UK NEQAS

Histocompatibility & Immunogenetics



Participant Portal User Guide



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1. Introduction

The UK NEQAS for H&I Participant Portal allows users to manage their EQA Scheme participation. This includes: Managing registration details, Viewing fees and invoices, Annual re-registration, Result entry, Access to Performance Reports, Complete CAPA forms

The system gives participant's full control for managing their laboratory details, scheme registration, data entry, reports and view payments.

Note: All the above functions are available to laboratories that register with UK NEQAS for H&I directly. Labs that register through a third party Agent/Distributor will not have access to fee and invoice information. A separate user guide for Agent's is available.

A link to the system can be found on the UK NEQAS for H&I webpage: <u>https://neqas.welsh-blood.org.uk/</u> or by visiting: <u>https://ukneqashandi.naqoda.cloud</u>.



2. Key Notes for the System

Mandatory fields within the system are highlighted with a * (there will be two * if it is part of the HLA nomenclature <u>and</u> a mandatory field).

Once logged in to the system clicking on the UK NEQAS H&I text in the top right corner will return you to the home page.

The data shown (e.g. performance tables, reports, assessment criteria) will relate to the distribution year you are currently viewing. You can view/change the distribution year using the button at the top-right of the screen:

Clicking on any of the table/column titles will sort the table results by that field.

Should you require assistance at any time please contact UK NEQAS for H&I directly on +44(0)1443 622185 or by email on <u>ukneqashandi@wales.nhs.uk</u>.

3. System Basics

3.1. Accessing the System

• Enter your user name (e-mail address) and password.

Note: If your laboratory is not yet a participant of UK NEQAS for H&I, follow the <u>new</u> <u>laboratory registration process</u> (section 4.3).

- If this is your first time logging in after registration, please use the forgotten password link (section 3.2).
- If you are a new user, you will be told that the password assigned to you has expired.
- Please create a password that is at least 8 characters long and contains at least one uppercase character, symbol **and** number



3.2. Forgotten Password

If you forget your password, please use the forgotten password link.

- Click on Lost your login data on the login page
- Enter your email address and click Send

You will now receive an email from <u>no-reply.ukneqashandi@welsh-blood.org.uk</u> with a link to reset your password. Please be patient as this email may not come through immediately and may go to a spam/junk folder so please check these folders.

The link in the email will take you to a page which will show a notification informing that your password has expired. Please create a new password (following the guidance in <u>section 3.1</u>), you will then receive the following message:



You can now click login to access the system with your email address and new password.

3.3. Home Page

After successful login you will be taken to your laboratory homepage. Here you can easily view any 'unread' notices and see any samples that are active (i.e. due for result entry).

My Lab	Registration	Staff	Results	Reports	Invoices	▼							UK NEQAS H&I
											Distri	ibution 2019	 Messages (1)
New No	tices					All Notices	Result	entries					
Date	Body				Priority	Status	Scheme	Sample	Due date	Date received	Date tested	Submitted	Attachment
16-Apr-20	20 Welcome to the Dear Participar	e UK NEQAS nt	S for H&I Particip	oant Portal	Medium	Active				No Result entr	ies recorded		
	Please familiar	ise with the r	new Participant F	Portal.									

The main menu buttons at the top of the page can be used to access all functions of the system. The buttons you see will depend on your user access (see <u>section 5</u>).

Click on the UK NEQAS for H&I logo at the top right of the screen from anywhere in the system to return to the homepage.

3.4. Exiting the System

To exit the system, click the drop down arrow from the top menu and select Logout

Note: although the page will remain on the screen, users will automatically be logged out of the system after 120 minutes of inactivity and any data that has not been saved/submitted will be lost.



My Lab	Registration	Staff	Results	Reports	Invoices								UK NEQAS HAI
						Profil	e				Distr	ibution 2019	* Messages (1)
New Not	lices					Pass	word	tries					
Date	Body				Priority	Long		iample	Due date	Date received	Date tested	Submitted	Attachment
17-Apr-202	Welcome to the Dear Participar	UK NEQAS	s for H&I Particip	perit Portal	Medium	rado	or.			No Result entr	les recorded		
	Please familiar	ise with the r	new Participant I	Portal.									

3.5. My Lab Information

The My Lab menu displays the general contact details of the laboratory.

The name of the lab, as assigned by UK NEQAS for H&I, is displayed here.

The lab number is also displayed on this page under 'Reference'. Please quote the lab name and reference number in any contact with UK NEQAS for H&I.

To maintain participant anonymity your lab will be allocated a unique number each year.

You will see this number appear on performance tables/downloads.

3.6. View User Profile

This page displays the user details.

- Click the drop down arrow from the top menu and select Profile.
- Make any necessary changes to your details and click Save.

Note: Changes to the e-mail address will change your login name for access to the system.

3.7. Password Change

- Click the drop down arrow from the top menu and select Password.
- Enter your new password twice and click Save.

Note: the password must be at least 8 characters long, including at least one uppercase character, one symbol and one number.

3.8. Notices/Messages

New messages from UK NEQAS for H&I are displayed on the homepage of the system.

Please note: Clicking on a message will mark it as 'read' and remove it from the homepage. To view previously read notices click on All Notices/Messages.

My Lab	Registration	Staff	Results	Reports	Invoices	•			UK NEQAS H&
Home Messag	es						All Messages	Distribution 2019	 Messages (1)
	Date	From							
	Body								
	Status		~ 2						
						Search			
Date	Во	dy						Priority	Status
17-Apr-202	20 We De	lcome to ti ar Participa	he UK NEQAS ant	S for H&I Parti	cipant Portal			Medium	Active
	Ple	ase familia	arise with the	new Participa	nt Portal.				

Use the All Messages button and the Messages button (which displays the number of 'unread' messages in brackets), to switch between viewing 'read' and 'unread' notices.

4. Registration

4.1. Scheme Registration Pages

The Scheme registration pages contain the information required to register a laboratory with UK NEQAS for H&I.

• Click on Registration from the top menu, then select Scheme Registration.

My Lab	Registration	Staff	Results	Reports	Invoices	•				JK NEQAS H&I	
Scheme Registration Distribution 2019 Messages (1)											
Distribution	year	Lab				Date	Agent	Scheme Entries	Status		
2019		WELSH	H BLOOD SE	RVICE		08-Mar-2019		14	Completed	*	
2018		WELSH	H BLOOD SE	RVICE		01-Jan-2018		14	Completed		

You will see a row for the current and previous registrations years. The status of the registration will show as one of the following:

Pending: The registration process needs to be completed (New laboratories or for annual re-registration of existing laboratories)

Draft: The registration forms have been saved, but not yet fully completed.

Incomplete: The <u>schemes' assessment criteria</u> (section 4.2) have not been completed

Complete: All aspects of the registration are complete

• Click on the relevant year/row to access the registration forms

Note: At any point during completion of the forms click save and continue to save the information entered so far and return at a later date. Otherwise click next to advance to the next page.

• **Page 1 General Information:** The laboratory information is displayed here. Carefully check the information. The address may be edited if required.

 Page 2 Scheme Registration: The schemes selected during initial registration will be selected (or the schemes you are currently registered for will be selected if you are completing annual re-registration). Schemes may be added or removed at this point as required by selecting/dissecting the 'Entries' tickbox.

Note: Once registration is finalised, schemes may be added or removed at any point during the distribution year (see <u>section 4.4.1</u> for more information on <u>adding and removing</u> <u>schemes during a distribution year</u>).

The relevant Scheme fee (excluding delivery fees) is displayed in the final column. If you are joining part way through a distribution year, the displayed fees are based on the number of distributions remaining. They will include additional costs such as choosing Isolated Lymphocytes or DNA as the "Material" (see below).

Note: If a scheme is due to be distributed in the next 7 days, it is not possible to join that particular distribution of samples, but you can still register for the scheme and you will be included in any subsequent distributions.

Scheme	Entries	Material	Samples Delivery	Fei
Scheme 1A - HLA Phenotyping 0 out of 5 distributions remaining		Blood samples ~	First Class	£0
Scheme 1B - HLA-B27 Testing 0 out of 5 distributions remaining				
Scheme 2A - Cytotoxic Crossmatching 0 out of 5 distributions remaining	Ð	Blood samples \sim	Courier	~ £0
Scheme 2B - Crossmatching by Flow Cytometry 0 out of 5 distributions remaining	e	Blood samples \vee		~ £0
Scheme 3 - HLA Antibody Specificity Analysis 0 out of 2 distributions remaining				
Scheme 4A1 - HLA Typing at 1st Field Resolution 0 out of 2 distributions remaining		Blood samples \sim		~ £0
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0 out of 2 distributions remaining		Blood samples \backsim		~ £0
Scheme 5A - HFE Typing 0 out of 2 distributions remaining				
Scheme 5B - Interpretative: HFE Genotype and HH 0 out of 2 distributions remaining				
Scheme 6 - HLA Antibody Detection 0 out of 2 distributions remaining				
Scheme 7 - HLA-8*57:01 Typing for Drug Hypersensitivity 0 out of 2 distributions remaining				
Scheme 8 - HLA Genotyping for Coeliac and other HLA associated diseases 0 out of 2 distributions remaining				
Scheme 9 - KIR Genotyping 0 out of 2 distributions remaining				
Scheme 10 - HPA Genotyping	100			

- The "material" column shows the material that is distributed for each scheme.
 - For Scheme 1A, 1B, 2A or 2B if you are a laboratory from outside the UK and Ireland, you can opt to receive Whole Blood or Isolated Lymphocyte samples
 - For Scheme 8, all labs have the option of Whole Blood or DNA

Note: there is a surcharge applicable for isolated lymphocyte and DNA samples.

• For each selected scheme, choose the sample delivery method.

Note: For laboratories outside the UK and Ireland courier delivery is mandatory for schemes that require viable cells for testing.

Note: Some schemes are distributed together to minimise delivery costs. If different delivery options are selected for schemes that are distributed together the "courier" delivery method will be used. Further information on delivery costs is available on the following registration page.

• If you wish to include any special comments about your registration, please

complete these in the 'notes' box.

• Page 3 Redirection Information: The default setting is that EQA samples are sent to the named individual at the laboratory address supplied during initial registration. This can be changed so that each scheme is addressed to the most relevant individual or, in the case of laboratories on different sites, sent to a

cheme Registration										
43% completed										
cheme Addressee										
Please indicate below if you wish any of the samples to be redirected for specific schemes.										
You can add additional users after completion of this registration by visiting the Staff menu.										
	gioradon of norang are etall mona.									
cheme Entries	giotation of holding the etail month.									
cheme Entries		Scheme	Entry Administrator							
cheme Entries Scheme Entry	First Name	Scheme Last Name	Entry Administrator Telephone	Email						
cheme Entries Scheme Entry 1A Scheme 1A - HLA Phenotyping	First Name Test	Scheme Last Name Example	Entry Administrator Telephone 0123456789	Email test.example@nhs.com						
cheme Entries Scheme Entry 1A Scheme 1A - HLA Phenotyping	First Name Test Add another ad	Scheme Last Name CExample Idress	Entry Administrator Telephone 0123456789	Email [test.example@nhs.com						

different address.

• Make any necessary changes to the named scheme contact by clicking in the relevant first, last name boxes as well as updating the telephone and e-mail contact details.

Note: individuals entered on this page may be given <u>access to the Participant Portal</u> after registration is completed, if required (<u>section 5</u>)

- To redirect samples to a different address, click in the address box dropdown and click on Add another address. Complete the pop up window with the relevant address details. You can give addresses specific names for quick reference by completing the Name field (e.g. 'main lab', 'molecular lab', 'serology lab' etc.).
- Page 4 Postage: This page displays a summary of postage fees and takes into account the chosen delivery options on the Scheme selection page, the number of distributions and any schemes distributed on the same date. To change delivery selection, navigate back to the scheme selection page using the previous button at the bottom of the page.
- Page 5 Invoice Information: Provide a purchase order number (if required).

	71% com	pleted		
nvoice Information				
We recommend that you supply Invoices issued without a valid A quote will be available once y Scheme Registration)	a Purchase Order Number with urchase Order Number will not ur registration is completed - th	your registration (where applicable) be re-issued. is can be found using the drop-dowr	n arrow to the right side of the relevan	t distribution year (Registration tab >
Invoices are issued by our host Please do not send payment un Participants with unpaid invoice	rganisation, Velindre University I the invoice has been issued. will be suspended until full pay	NHS Trust, and sent to the e-mail li ment is received.	isted on file.	
Purchase order *				
 I want to specify a purchas I will provide a purchase or My institution does not required 	order number now er number at a later date re a purchase order number			
Purchase order number				
nvoice Address *				
H&I Lab Pathology Depart	nent Hospital X Hospital Ro	ad, Hospital Way, AB12 3CD		\sim

- Add a relevant finance address/named finance contact by clicking in the address box and selecting add another address if necessary.
- Complete any relevant invoicing notes, e.g. request hard copies.
- Page 6 Almost Done: View the UK NEQAS for H&I terms and conditions of participation: click the terms and conditions link at the bottom of the screen (opens in new window). Tick the box to confirm acceptance.
 There is also a Tick box is confirm is you are happy to receive marketing emails

from UK NEQAS.

• Save the information completed so far by clicking save and continue to scheme assessment criteria.

You will now be asked to confirm the assessment criteria for each registered scheme e.g. HLA loci for assessment. Schemes with no options will not be shown (e.g. 1B, 5B, 7, 11)

Scheme Registration Scheme 1A Registration
TYPING FOR HLA-A, B, C, DR, DQ
Depending on their typing strategies participants may register for HLA- A, B, C, DR, DQ assessment. Participants must only register to be assessed on those loci tested using serological methods. The Steering Committee acknowledges that many laboratories use supplementary techniques to aid in the definition and refinement of HLA specificities.
Participants will retain their assessment level for all samples tested throughout the year.
Please indicate the loci to be assessed:
HLA-A
HLA-CW
HLA-DR
HLA-DQ

Please ensure this information is correct as this will be used for scheme assessment. Failure to submit all registered results will result in unacceptable performance. This information can be viewed and edited at a later date via <u>Scheme entries</u> (see <u>section 4.2</u>).



• Progress through the pages using the save and continue to next scheme button.

Once all schemes assessment criteria have been completed you will return to the main Scheme Registration page.

The Scheme registration status should now show as 'complete'. Your registration with UK NEQAS for H&I for the current distribution year is now complete.

If it is showing as 'draft' or 'incomplete' click on your lab to re-enter the registration forms and complete any missing information. Please note you will not need to re-enter information you have already submitted.

4.2. Scheme Entries (assessment criteria)

• Click on Registration from the top menu, then select Scheme Entries.

The Scheme entries page displays the registered scheme(s) for your laboratory and allows you to view and edit the analytes selected for assessment (e.g. HLA loci for assessment - for relevant schemes only).

My Lab	Registration	Staff	Results	Reports	Invoices	•			UK NE	QAS FOR H&I
Schen	ne Entries									
	Scheme									
						Search				
Year	Scheme					Postage Type	Material	Status	Participation Notes	
2018	Scheme 1A - HLA P	henotypin	g			First Class	Blood samples	Active		
2018	Scheme 2A - Cytoto	xic Crossr	natching			First Class	Blood samples	Active		
2018	Scheme 2B - Crossi	matching t	y Flow Cytom	netry		First Class	Blood samples	Active		
2018	Scheme 4A1 - HLA	Typing at	1st Field Resc	olution		Courier	Blood samples	Active		
2018	Scheme 4A2 - HLA	Typing to 2	2nd or 3rd Fie	ld Resolution		Courier	Blood samples	Active		
X										Σ

The scheme entry status will be displayed as:

Incomplete: Requires at least one scheme analyte for assessment to be selected

Active: At least one scheme entry for assessment has been selected

Click on a scheme to view the assessment criteria selected and amend if necessary. Ensure you press Submit to save any changes.

4.3. New Laboratory Registration Process

Laboratories that are not currently registered for any UK NEQAS for H&I Schemes can register their interest to participate using the system.

Stage 1

On the Participant Portal home page click on New Lab Registration.

UK NEQAS International Quality Expertise	Histocompatibility & Immunogenetics
Login name Password	gin
	Lost your login data?
New Lab Registration	New Agent Registration

Complete the relevant information and progress through the pages by clicking the Next button.

Note: "VAT liable = Yes" means you are subject to and will be charged UK VAT (Value Added Tax) on top of your registration fees.

• **Page 1 General Information**: Address of the laboratory. This should be the primary laboratory address where the majority of samples will be sent.

Note: It is possible to set up multiple address for delivery of samples to different sites later in the registration process.

• Page 2 Contact Information: Contact details for a relevant staff member

Note: The contact details provided will be used to send email instructions to complete the registration process and to create an account to access the UK NEQAS for H&I system. This user will be set up as a 'primary' user of the system and must have authority to register the laboratory. Once successfully registered and accepted, other users can be added to your account (see <u>section 5 Staff</u>).

• Page 3 Scheme Registration: Select the UK NEQAS for H&I Schemes you are interested in joining. Add any notes regarding your registration that you wish UK NEQAS for H&I to consider.

	UK NEQAS FOR H&I
New Lab Registration	
100% completed	
Scheme Information	
Please indicate the schemes you intend to register for.	
Scheme Registration	
Scheme	Please select
Scheme 1A - HLA Phenotyping 0 out of 5 distributions remaining	
Scheme 1B - HLA-B27 Testing 0 out of 5 distributions remaining	
Scheme 2A - Cytotoxic Crossmatching 0 out of 5 distributions remaining	
Scheme 2B - Crossmatching by Flow Cytometry 0 out of 5 distributions remaining	
Scheme 3 - HLA Antibody Specificity Analysis 0 out of 2 distributions remaining	D
Scheme 4A1 - HLA Typing at 1st Field Resolution 0 out of 2 distributions remaining	
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0 out of 2 distributions remaining	
Scheme 5A - HFE Typing 0 out of 2 distributions remaining	
Scheme 5B - Interpretative: HFE Genotype and HH	

Note: Scheme selection can be finalised/amended during the full registration process once the initial application has been accepted.

• Complete the "Captcha" and click Submit at the bottom of the page.

Your application will be reviewed by UK NEQAS for H&I. You will receive an e-mail to the address supplied with further information once the application has been reviewed.

Stage 2

Once your application for registration in UK NEQAS for H&I Schemes has been accepted, you will be sent an e-mail with your login details. You will need to access the system to complete the registration process.

Please note that your registration will not be finalised until this process is complete.

• Login to the system (section 3.1).

Once successfully logged in to the system, you will be taken to the participant homepage.

• Complete the <u>Registration information (section 4.1)</u>.

Note: On the Scheme Registration page (Registration - Scheme Registration) new labs will have the registration status 'pending'. The registration process will not be complete until all required information has been supplied and the status is shown as 'complete'.

• Add additional <u>system users</u> for your laboratory (<u>section 5</u>).

You are now fully registered to participate in UK NEQAS for H&I Schemes. You will receive notifications when samples are distributed, result deadlines are approaching and when reports are available to view.

4.4. Amending Registration

At any time after initial registration/annual re-registration is complete changes can be made through the system.

These changes include:

- Add additional scheme(s)
- Remove Scheme(s)
- Change delivery options
- Change sample material
- Change the scheme assessment criteria

Changes to registration can only be made by a primary user.

4.4.1. Add/Remove Schemes

Schemes can be added or removed from your registration at any time during the distribution year. For new schemes, your laboratory will be added to the remaining distributions (if any). If all distributions have been completed, you can still add a scheme and it will take effect the following year (following annual re-registration). Scheme fees are reduced to reflect the number of remaining distributions. If you require additional samples, please contact UK NEQAS for H&I directly who may be able to provide samples from missed distributions.

- To access the registration forms, click registration and scheme registration.
- Click the distribution year you wish to amend.
- Progress through the registration pages to the scheme selection page (page 2).
- On the Scheme registration page, select any additional scheme(s) you wish to add, or deselect any scheme(s) no longer required.

Note: Schemes added after initial registration may require an additional invoice if an invoice has already been produced. Withdrawal from a scheme after initial registration/re- registration does not result in refund of fees.

Note: It is not possible to join a distribution that is scheduled in the next 7 days. You may still register for the scheme and you will be included in any subsequent distributions

• Select the delivery method and sample material (relevant schemes only) for any additional schemes.

Scheme fees displayed are based on the number of distributions remaining.

- Continue through the registration pages, making any changes to sample redirection if required.
- If you need to supply an additional purchase order number, record this on the invoice page.
- On the final registration page, save the information competed by clicking save and continue to scheme assessment criteria.

• You will be taken through the assessment criteria (e.g. HLA loci for assessment) for all registered schemes. For any additional scheme(s), ensure the assessment criteria are selected for registration of the new scheme(s) to be compete.

4.4.2. Change Delivery or Sample Material

Sample delivery options and sample material type can be changed at any time during the distribution year.

Some sample material options are only available for relevant schemes or non-UK participants (who have the option of isolated lymphocyte samples). Isolated lymphocyte or DNA samples incur an additional fee. If you are unsure of the best sample material for your laboratory or to discuss sample material options in more detail, please contact UK NEQAS for H&I.

Note: For laboratories outside the UK and Ireland courier delivery is mandatory for schemes that require viable cells for testing.

Note: Some schemes are distributed together to minimise delivery costs. If different delivery options are selected for schemes that are distributed together the 'courier' delivery method will be used.

Changes to sample delivery or material type will take effect for the next distribution, unless a distribution is scheduled to take place in the next 7 days, in which case it will be the following distribution that the change takes place.

- To access the registration forms, click registration and scheme registration.
- Click the distribution year you wish to amend.
- Progress through the registration pages to the scheme selection page (see <u>section</u> <u>4.1</u> for detailed description of each registration page).
- On the Scheme registration page, make any necessary changes to sample delivery or material type. Delivery costs associated with the selected option(s) are displayed on a subsequent registration page.
- Continue through the registration pages.
- If you need to supply an additional purchase order number for any additional fees associated with changes to delivery or sample material, record this on the invoice page.
- On the final registration page, save the information competed by clicking save and continue to scheme assessment criteria.

4.4.3. Amend Scheme Assessment Criteria

Schemes analytes for assessment can be altered at any time during the distribution year (e.g. if you start to test an additional HLA Loci).

Changes to scheme analytes can only be made by a primary user.



- To access the scheme analytes, click registration and scheme entries.
- From the list of registered schemes, select the scheme you wish to amend.
- Make the necessary changes to the assessment criteria and click submit.

The changes will take effect for the next assessment of samples.

My Lab	Registration	Staff	Results	Reports	Invoices	▼	UK NEQAS FOR H&I
Scheme	Entries						
Scheme	2A Registra	ation					
TEST	ING WITH PE		OR T-CE	ELLS AND	OR B-CE	ELLS WITH AND WITHOUT DITHIOTHREITOL	TREATMENT
Particip Particip	oants may register oants will retain the	for periphe	eral blood lym nent level for	phocyte PBL/ all samples te	T-cell assessn sted throughou	nent and/or B-cell assessment with or without dithiothreitol (DTT) tre ut the year.	atment.
PBL ass	essment without	DTT					
	a a a a manufactura da traite a su data a	ADTT					
	sessment withou						
B-cell as	ssessment withou	ut DTT					
PBL ass	essment with DT	т					
		**					
	sessment with D	11					
B-cell as	ssessment with D	тт					
L							

4.5. Annual Re-registration

Annual re-registration takes place each year, with existing participants confirming their details and scheme registrations before commencement of the new distribution year. It is the laboratory's responsibility to ensure that all details are correct.

If re-registration is not completed, UK NEQAS for H&I will continue to send samples on the same basis as the previous year, unless a request to <u>cancel participation</u> is received (<u>section 4.7</u>). Any material sent will be charged for. Laboratories will be unable to enter EQA results until re-registration is completed.

UK NEQAS for H&I will notify participants when re-registration is necessary. Scheme registration and lab/user details will be copied across to the next distribution year for checking and amending as necessary.

Re-registration must be completed by a primary user.

- To access the registration forms, click 'registration' and 'scheme registration'
- On the Scheme Registration page you will see the upcoming distribution year registration status as 'pending'. The re-registration process will not be complete until all required information has been checked and the status is shown as 'complete'. Click on your laboratory name to access the registration forms.
- Progress through the registration pages, checking all details and making updates

as necessary. Scheme assessment criteria also need to be confirmed (see <u>section</u> <u>4.1</u> for a full explanation of the <u>registration pages</u>).

During re-registration we would also recommend checking the <u>staff members with access</u> to the EQA system (<u>section 5</u>) to remove any users for whom access is no longer required or add new staff as relevant.

4.6. **Registration Certificate and Scheme fees Quotation**

Any time after initial registration is complete, a certificate of registration and scheme fee quotation can be produced.

- Click Registration > Scheme Registration
- On the row for the relevant distribution year, click the drop down arrow and select 'Certificate' or 'Quote' as required

Note: the dropdown arrow is only visible after registration status is 'Completed'

My Lab	Registration	Staff	Results	Reports	Invoices	▼				UK NEQAS H&I
Scheme	Registratio	n								Distribution 2019
Distributior	n year	Lab			Date	Э	Agent	Scheme Entries	Status	
2019		UK	NEQAS for H	&I	29-4	Apr-2020		1	Completed	•
										Certificate
										Quote

- A copy of the registration certificate/quote will be emailed to you
- It may not be received immediately, but please ensure you check spam/junk email folders

Note: A certificate of registration only confirms that the laboratory has registered to participate in the EQA Schemes outlined in the certificate and does not provide any performance information.

4.7. Cancellation of Participation

To withdraw your laboratory from all UK NEQAS for H&I Schemes.

- Click Registration and Withdrawal
- We would be grateful if you could complete the short questionnaire
- Click Submit. The cancellation will be reviewed by UK NEQAS for H&I and you will receive notification once it has been accepted
- If we believe this has possibly been done in error, we may contact you via email to confirm
- If you do submit a withdrawal request in error, please email us immediately to ensure we reject it

Note: Laboratories that have withdrawn will still be able to access the UK NEQAS for H&I Participant Portal for the remainder or the current distribution year for reports. However, after the end of the distribution year, access will be removed. We



recommend saving any reports to your local computer.

5. Staff

• Click on Staff from the top menu

The 'Lab Staff' page allows you to view/add/remove staff as users of the UK NEQAS for H&I Participant Portal.

Several different user access levels have been created to allow laboratories to assign different user roles to staff members using the system. There is no limit to the number of users that can be added. Users of the system will be able to see relevant notices and receive emails relating to EQA scheme operation.

Note: Only 'primary' users of the system can add new users/remove users in the system.

My Lab	Registration	Staff	Results	Reports	Invoices	•			UK NEQ/	AS FOR H&I
Lab Sta	ff									Add
First name	Last	name	Ema	ail i			Phone	Role	HOD	
Test	Exa	mple	test.	example@nh	s.com		0123456789	Primary User	V	
Tom	Jerry	/	tj@tj	j.com				Scheme User		*
Mickey	Mou	58	mm(@nhs.com			Ū.	Report Recipient		•

<u>User Roles</u>

Primary Users:

The 'super users' of the system, with access to view/edit all system functions. This role is designed for senior members of staff who have the authority to register the laboratory, add/remove users to the system and manage EQA participation.

This role is assigned to the individual who completes new registrations.

Menu buttons visible:

It is the primary users' responsibility to ensure users of the system are regularly reviewed to maintain appropriate access for your laboratory and confidentiality of your EQA results.

Scheme Users:

This role is designed for staff to enter scheme result/method information and view reports for their assigned scheme(s).

Menu buttons visible:



My Lab Registration Staff Results Reports Invoices

Note: We recommend having enough scheme users/primary users set up in the system for each scheme to allow results to be entered by one user and verified/submitted by a second user to minimise the risk of data entry errors. See <u>section 6.1 Result Entry</u> for further information on entering and submitting results.

Report Recipient:

Report recipients are able to login to the system to view reports only. This role may be relevant for laboratory directors/quality managers who do not wish to be involved in the daily EQA scheme operations, but wish to be able to view scheme performance reports.



Menu buttons visible:

My Lab Staff Results Reports ▼

Please ensure that the Head of Department/Laboratory Director is given access to the system and identified by ticking the 'Head of Department' box. Depending on their preference and involvement in EQA Scheme management, they can be set up as any type of user. The Head of Department will be notified in the event of any unsatisfactory performance.

User Role Summary

	Ра	rticipant F	Portal Function		
User Role	Administer Registration/Scheme assessment criteria	Manage Users	Enter results	View reports	View Invoices
Primary User	\checkmark	\checkmark	√ All Schemes	√ All Schemes	\checkmark
Scheme User	Х	х	√ Assigned Schemes only	√ Assigned Schemes only	х
Report Recipient	Х	х	х	√ Assigned Schemes only	х

5.1. Adding A New User

• Click on the Add button in the top right corner of the 'Lab Staff' homepage.

My Lab	Registration	Staff	Results	Reports	Invoices	▼		ι	IK NEQAS FOR	R H&I	^
✓ Lab Sta Lab Sta	^{ff} ff - Add				-	-					
	Lab*	Example	Laboratory								
	First name *										
	Last name *										
	Email *	Email			Confirm						
	Phone				Commit						
	HOD										
	Role *		~								
	Last activity										
						Save					

 Complete the required name and contact information and select the relevant <u>user</u> role. If the user is the Head of Department/Laboratory Director, tick the 'HOD' box. *Note:* All labs should have at least one individual identified as the Head of Department/Laboratory Director.

• Once all required information is complete, click save and the staff member will be sent an e-mail detailing how to access the system.

New Scheme Users and Report Recipients will have access to enter results/view reports for all registered schemes. To change the Scheme(s) a user has access to see <u>section 5.3</u> - <u>Add/Remove assigned Schemes</u>.

5.2. Editing User Details/Role

Primary Users can edit any user contact details (e.g. name, e-mail address) and change the <u>user role</u> of lab staff.

Note: Staff can edit their own contact details via the *Profile* page (section 3.6).

• Click on the relevant staff member from the Lab Staff homepage.

The staff member's details are shown on the left side of the page. These can be updated as necessary.

Note: If changes are made to the users e-mail address this will also affect their login username.

The user role may be changed by clicking in the user role field. See <u>section 5</u> for further information on <u>user roles</u>.

• Click save to save any changes.

5.3. Add/Remove Assigned Schemes

Scheme Users and Report Recipients can be given access to certain schemes, for example depending on their specific area of work. This allows staff to only access and receive emails about schemes relevant to them.

New users are set up with access to all registered schemes by default. A list of registered schemes that the user is assigned to can be viewed by accessing the Staff tab then clicking on the row of the relevant staff member. The Scheme Staff Links are then displayed.

• If you would like to make changes to the schemes linked to a staff member please contact the UK NEQAS for H&I office at <u>UKNEQASHandI@wales.nhs.uk</u>

5.4. Remove a User

Primary users must regularly review the list of staff users and remove any user who should no longer be able to access the system, to maintain the confidentiality of lab EQA results.

To remove a user:

• From the Lab Staff homepage, click on the drop down arrow next to the user to be removed and click on archive.

A summary of the user details will be displayed. Click 'confirm' to confirm the user is to be archived. Archived users will no longer be able to login to the EQA system. The user will be shown with a strikethrough on the list of users in the 'Lab staff' homepage. To reinstate a user follow the process again and confirm which should remove the strikethrough and the user will regain access.

6. Result Entry

The result entry pages can be accessed via the Results menu.

Choose Pending Results to view active samples for which results can be entered. Choose All Results to see previously submitted results, upcoming samples as well as active distributions.

This option will display the **Result Entries** table which contains a list of the Schemes and samples which have been sent to your laboratory.

Scheme	Scheme Name
Sample	The particular sample from the scheme. Each sample is a unique entry in the table.
Due date	The result deadline for the sample
Date received	This field is blank until completed by a user during scheme entry for the date the sample was received.
Date tested	This field is blank until completed by a user during scheme entry for the date the sample was tested.
Status	Shows the status of the sample in the EQA process – see below
Submitted	Box will be ticked when results have been entered and submitted
Attachment	Relevant for certain schemes where laboratory reports are submitted
	for assessment (e.g. Scheme 5B)

Description of Result Entries Table

There are several distribution statuses which reflect the position of a particular sample in the EQA distribution process.

- **1. Pending Distribution:** This signifies upcoming distributions for your laboratory
- **2. Preparing Distribution:** 7 days prior to a distribution the status will change to 'Preparing Distribution'
- **3. Pending Results:** Active samples for which users are able to enter results. Samples with this status are shown in the 'Pending Results' menu option and on the homepage

- **4. Assessing Results:** Signifies UK NEQAS for H&I are assessing the results and it is no longer possible to submit or edit results
- **5. Assessment Completed:** Assessment has been completed and reports will be available shortly
- **6. Reports Published:** Distribution is complete. The result summary and individual lab report are available (see <u>section 7 Assessment Reports</u> and <u>7.1 Performance</u> <u>Tables</u>)

Use the scheme and/or status fields to search for results relating to particular scheme or with a certain status.

Note: Clicking on any of the table titles within the blue header will sort the table results by that field.

My Lab	Registration	Staff	Results	Reports	Invoices	V			UK NEQAS FOR H&I
Result e	entries								
	Scheme								
	Status			\sim					
						Search			
Scheme				Sample	e Due date	Date received	Date tested	Status	- Submitted Attachment
Scheme 2	3 - Crossmatching	by Flow C	ytometry	01/201	8 09-Mar-20	018		Reports Published	
Scheme 2	3 - Crossmatching	by Flow C	ytometry	02/201	8 09-Mar-20	018		Reports Published	
Scheme 1	3 - HLA-B27 Testin	g		07/201	8 22-Oct-20	18 02-Oct-2018	09-Oct-2018	Pending Results	
Scheme 1	3 - HLA-B27 Testin	<u>a</u>		08/201	8 22-Oct-20	18 09-Oct-2018	09-Oct-2018	Pending Results	V
iED - Intern	pretive Clinical Sce	narios		03/201	8 06-Nov-20	018		Pending Results	
Scheme 2/	A - Cytotoxic Cross	matching		01/201	8 30-Mar-20)18		Assessment Completed	

6.1. Entering Results

The system is designed to allow results to be entered, review and submitted by a single or multiple users, depending how your laboratory wishes to submit EQA results.

To remove the risk of data entry errors we recommend that one user enters the results, then another user access the system to review and submit the results.

Results can be entered and submitted by the same user (either immediately or at a later date). In this instance, we would recommend entered results are saved and the summary downloaded/printed (<u>see below</u>) prior to submitting and checked by a second person outside of the system.

Note: data entry, nomenclature and typographical errors are considered as part of the assessment and will be considered as unacceptable.

As samples are treated independently in the system, multiple users can enter/submit results for specific samples in a distribution.

	Results er submitted us	ntered and by a single ser	Results en submitte differer	tered and d by two nt users	Results entered and submitted by multiple users		
Sample	e Result Entry Verify/Submit		Result Entry	Verify/Submit	Result Entry	Verify/Submit	
01/2018	User 1 User 1		User 1	User 2	User 1	User 3	
02/2018	User 1	User 1	User 1	User 2	User 2	User 4	

Examples of how results can be entered and submitted by single or multiple users:

Results can only be entered/submitted by primary users or scheme users with the relevant scheme assigned to them.

- Select Results from the main menu and Pending Results.
- Click the row of the relevant sample to access the methods and result entry pages.
- To view a summary of entered results and the person(s) who entered/verified them see section <u>6.4. View/Save/Print Entered Results</u>

You will initially be taken through the method pages (<u>Section 6.2</u>) followed by the result entry pages (<u>Section 6.3</u>).

6.2. Method Pages

If this is the first time you have entered results for a scheme or a new question is added, please complete your laboratory testing methods by completing the methodology questions.

If method information has previously been entered it will be displayed. Review the information and update any answers in line with your laboratories testing.

Use the Next button to progress through the method questions. Click Continue to Results to save the entered/updated method information.

Use the Skip methods and continue to result entry button if the method information has already been reviewed (e.g. for subsequent samples in a distribution) to progress directly to the result entry pages.

6.3. Result Entry Pages

The analytes for assessment selected during registration (e.g. HLA loci or PBL/T/B cells) will be displayed (for applicable schemes). Results entry is mandatory for all registered categories, indicated by a * (there will be two * if it is part of the HLA nomenclature **and** a mandatory field). If you no longer test for and do not want to enter a result for a particular analyte you will need to amend your <u>assessment criteria</u> (see <u>section 4.4.3</u>). This can only be done by a Primary User.

• Enter the EQA results for the relevant sample.

• General guidance will be provided on the results entry pages and will include a link to scheme specific guidance on our website.

If a sample could not be tested/reported select 'not tested' or enter 'NT' in mandatory fields to progress through the result entry pages. Reasons for not testing/reporting samples will be requested on the final page. Not tested results are excluded from assessment if a valid reason is supplied.

You can use the 'tab' button on your keyboard to quickly move between fields after clicking the first field.

You may enter results for analytes not registered for, but will not form part of the assessment. The anonymised results will be available to all participants in the result summary.

- At the end of each sample there is a comments box to record comments on any issues with the sample or general comments for UK NEQAS for H&I.
- Click save and continue to progress to the result submission page.
- Select if the sample was:
 - Fully tested the sample was fully tested without issue.
 - Partially tested only some of the required test(s) could be performed or not all registered analytes could be reported e.g. T cell results reported but not B cell results for crossmatching.
 - Not tested the sample could not be tested/reported.
- Enter the date the sample was received by the laboratory.
- For fully and partially tested samples, select the date of sample testing. If testing was performed over several days, select the first day of testing.
- For samples that were only partially tested/reported or unable to be tested/reported, select the reason from the list of most common not tested/reported issues. Provide full details of the reason and any other comments in the confirm reason for not testing box.
- If you wish to submit the results at this point, tick the Submit box to confirm you wish the results to be submitted for assessment. However, we strongly recommend another user accessing the system to review and submit results to avoid data entry errors.

The user that entered results 'User (data entry)' and the user that submitted results 'User (verify)' will automatically be populated by the system as an audit trail after entry.

Note: If a sample could not be tested/reported due to sample quality issues or technical failure you must still complete and submit the result forms to inform us of this. Participants that do not submit results will be assessed as unacceptable even if the samples could not be tested.

Results for Scheme 8 - HLA Genotyping for Coeliac and other HLA associated diseases: Sample 06/2018
Not tested
Date received
Reason for non-testing
v
Confirm reason Please confirm reason for not testing.
User (data entry)
User mito entereu nie results uala. Wili automatically de updateu.
User (verify)
User who verified and submitted the results. Will automatically be updated.
Submit
Check this box to submit your results or save the form if you want to come back here later.
Note that results that have not been submitted will not be assessed.

• Click Save to complete the result entry for that sample.

Note: Results that are not submitted, will not be included in assessment.

You will be taken back to the result entry homepage. Repeat the above process for any other samples you wish to enter results for.

6.4. View/Save/Print Entered Results

A summary of the entered results and who enter/submitted them for all samples in a distribution can be viewed together.

- Select Results from the main menu and Pending Results or All Results.
- Click the drop down arrow at the end of the row and select "Summary"

My Lab	Registration	Staff	Results	Reports	Invoices	•				UK NEQAS H&I
Result e	entries									Distribution 2019
	Scheme									
	Status			\sim						
						Search				
Scheme				San	nple Due o	late Date red	ceived Date tested	Status	Submitted	Attachment
Scheme 2E	3 - Crossmatching	by Flow C	ytometry	01/2	019 12-A	or-2019 03-Apr-2	2019 03-Apr-2019	Reports Published	V	•
Scheme 2E	3 - Crossmatching	by Flow C	ytometry	02/2	019 12-Ap	or-2019 03-Apr-2	2019 04-Apr-2019	Reports Published	V	Summary

This will take you to a summary of entered results which you can view or download as a PDF. The report can then be saved to your computer or printed.

6.5. Submit Previously Saved Results

Results entered and saved by a user can be submitted by the same or a different user (see section 6.1).

• Select Results from the main menu and Pending Results.

Samples that do not have a tick in the 'submit' box require submitting for assessment



before the result deadline.

My Lab	Registration	Staff	Results	Reports	Invoices	•					NEQAS FOR H	a) ^
Result e	ntries											
	Scheme											
	Status			~								
						Search						
Scheme				Samp	le Due date	Date received	Date tested	Status	÷	Submitted	Attachment	Ľ.
Scheme 2E	3 - Crossmatching	by Flow C	ytometry	01/20	18 09-Mar-2	018		Reports Published				
Scheme 2E	3 - Crossmatching	by Flow C	ytometry	02/20	18 09-Mar-2	018		Reports Published				
Scheme 1E	3 - HLA-B27 Testin	<u>D</u>		07/20	18 22-Oct-20	018 02-Oct-2018	09-Oct-2018	Pending Results				
Scheme 1E	<u>} - HLA-B27 Testin</u>	<u>D</u>		08/20	18 22-Oct-20	018 09-Oct-2018	09-Oct-2018	Pending Results		V		

- To review and submit the results follow the guidance in section <u>6.4 Result Entry</u> <u>Pages</u>
- Navigate through the method/result pages checking/editing data where necessary.
- On the result submission page ensure you tick the Submit box to confirm you wish the results to be submitted for assessment before saving.

The user that entered results and the user that submitted results will automatically be populated by the system as an audit trail.

6.6. Editing Submitted Results

Submitted results may be edited and resubmitted anytime up to the result deadline. This can only be performed by a primary user.

- To edit previously submitted results follow the guidance in section <u>6.4 Result Entry</u> <u>Pages</u>
- Navigate through the method/result pages checking/editing data where necessary.

7. Assessment Reports

Notification will be sent when your report is available to view in the Participant Portal.

• Click on Reports and Performance Reports to access all laboratory reports.

The table will display a list of available Scheme Assessment Reports and Annual Performance Reports. Unsatisfactory performance and close-out letters will also appear in this list. Documents for the distribution year you are viewing will be visible (see <u>section</u> <u>2. Key Notes for the System</u>).

• You can search by type of document, scheme or distribution date. Or click on the table headers to 'sort' the contents by that field.

The status field will show if the reports is original, replaced or reissued

• Click on the relevant scheme/report to then click the hyperlink next to

'Document' to open it. The documents can be saved to a local server or printed.

7.1. Performance Tables

The performance tables are used to view results and method information reported by all participants.

• Click on Reports and Performance Tables to access the results summaries.

The table shows all the schemes/distributions your laboratory has been involved in for the distribution year you are viewing (see <u>section 2. Key Notes for the System</u>).

• Click on the relevant scheme and sample number to view detailed results for that sample.

At the top of the performance table is a summary of the number of laboratories involved in the distribution, along with numbers of laboratories that were assessed as acceptable/unacceptable for each result. The consensus (and reference result if used) will also be displayed in this summary.

Below the summary is a breakdown of each laboratory's report results. **Your laboratory's result will be highlighted by a dashed line box**. Note the assigned lab number (which will be different from your lab reference number and can vary annually) if you plan to download the results.

Red	Assessed as 'Unacceptable'									
Grey	Laboratory	Laboratory not registered for that								
	assessment	catego	ry							
Strike-through	Not Assessed	Not Assessed (e.g. consensus not reached)								
Italic	Not Tested									

The performance table uses the following formatting to highlight results:

For schemes with multiple assessment categories (e.g. T and B cell results) each set of results will be shown on a separate tab. Click on the different tabs to view the results.

Use the Toggle View button to see extra information reported by labs, such as cell viability, date received /tested, cytometer readings etc.

To download a copy of the results in .xlsx format (i.e. for viewing in Microsoft Excel), click the Download Results button at the bottom of the page. Methodology information will also be downloaded simultaneously into a separate tab in the document.

To see method information reported by laboratories, click the Method button at the top right of the page.

7.2. Rolling Summary

• Click Reports from the top menu and select Performance Rolling Summary.

The rolling summary page displays your ongoing performance in a scheme for the current distribution year you are viewing (see <u>section 2. Key Notes for the System</u>).

The table displays the schemes and categories you are registered for assessment, i.e. if you are registered for Scheme 2B assessment of T and B cells, these will be shown as separate lines in the table. The 'Assessment' result is the current percent of samples that have been assessed as 'acceptable' and updates after each distribution is complete.

My Lab	Staff	Results	Reports	▼					UK NEQAS FOR H&I				
Rolling	Rolling summary												
Scheme					Test	Number tested	Number correct	Number assessed	Assessment				
Scheme 1/	a - Hla Pi	nenotyping			*	2	2	3	66.7%				
Scheme 18	B - HLA-B2	27 Testing			*	3	2	3	66.7%				
Scheme 2/	A - Cytotox	kic Crossmatc	hing		B cell with DTT	16	14	15	93.3%				
Scheme 2/	A - Cytoto	cic Crossmatc	hing		B cell without DTT	16	11	11	100%				
Scheme 2/	A - Cytotox	cic Crossmatc	hing		PBL with DTT	16	15	15	100%				
Scheme 2/	A - Cytotox	cic Crossmatc	hing		PBL without DTT	16	14	16	87.5%				
Scheme 2/	A - Cytoto	cic Crossmatc	hing		T cell with DTT	4	0	0	Not Assessed				
Scheme 2/	A - Cytoto	cic Crossmatc	hing		T cell without DTT	4	4	4	100%				
Scheme 28	B - Crossn	natching by Fl	ow Cytometry		B cell	24	20	21	95.2%				
Scheme 28	B - Crossn	natching by Fl	ow Cytometry		T cell	24	20	21	95.2%				
Scheme 4/	A2 - HLA 1	yping to 2nd	or 3rd Field Re	solution	2nd Field Resolution	0	0	0	Not tested				
Scheme 4/	A2 - HLA 1	yping to 2nd	or 3rd Field Re	esolution	3rd Field Resolution	0	0	0	Not tested				

Description of Rolling Summary Table

Scheme	Scheme Name
Test	The assessment category e.g. T Cell, B Cell (* means not applicable)
Number Tested	Number of samples for which 'assessable' results were reported by
	your laboratory
Number Correct	Number of samples assessed as 'acceptable' for your laboratory
Number Assessed	Number of samples that were assessed, e.g. reached consensus
Assessment	The percentage of 'assessed' samples assessed as 'acceptable'

• Click on a scheme to view a breakdown of all the individual sample results in the current distribution year.

7.3. Unsatisfactory Performance/CAPA

If your laboratory fails to meet the Schemes' minimum performance criteria (see Participant Manual on our website <u>ukneqashandi.org.uk</u>), your laboratory will receive notification that you are an unsatisfactory performer (UP) and will be asked to complete a Corrective and Preventative Action (CAPA) form.

• Click on Reports and Unsatisfactory Performance to access the CAPA forms.

Guidance is available at the top of the CAPA form. We advise using the CAPA Form template available on the external guidance page to complete then copy/paste the data in to prevent loss of data if the page times out.

Description of CAPA Table

Scheme	Scheme Name
Date	The date the CAPA was issued by UK NEQAS for H&I
Status	'Issued' denotes UK NEQAS for H&I has noted your laboratory has
	unacceptable performance for a scheme and has sent you a CAPA form
	to complete. 'Pending' denotes the CAPA form has been completed and
	submitted to UK NEQAS for H&I. 'Closed' denotes UK NEQAS for H&I
	have reviewed and closed out the matter
Attachments	You can attach documents to support your CAPA form submission

To complete a CAPA form for a Scheme click on the row. This will open up the CAPA form where can submit your responses. Click 'Upload' to attach any supporting documents if relevant:

How will you follow-up of and effectively?	- on these actions? What procedures will be used to review performance to ensure your corrective/preventative actions have been implemented successfully
3. Lessons learnt	
E.g. showing good prac	tice being implemented.
Attachments	
Please upload any supp	sorting documents
Upload	
Jacoba .	
CAPA	
supporting ~	
	Cubmit
	Subnit

Click Submit once you have completed the form. The status will now change to pending.

Please note only Primary Users can submit CAPA forms.

Once UK NEQAS for H&I have reviewed the submitted CAPA form they may contact you by email for further information/clarification or they may issue a close out letter if the matter has been sufficiently investigated and resolved.

You can view previously completed CAPA forms from the main CAPA page. You can also search the CAPA forms based on status.

Once the matter is closed, a close-out letter will be emailed to you, however you can also view close-out letters in Reports and Performance Reports.

7.4. Annual Performance Certificate

At the end of a UK NEQAS for H&I distribution year, UK NEQAS for H&I will produce an annual performance certificate for laboratories. Notification will be sent when the certificate is available to view. They are available to view in Reports > <u>Assessment Reports</u> (see <u>section 7</u>).

8. Invoices

Primary users can access invoices for EQA participation.

• Click Invoices from the top menu.

The invoice table lists invoices for UK NEQAS for H&I for EQA participation.

My Lab	Registration	Staff	Results	Reports	Invoices	▼				UK NEC	QAS FOR H&I
Invoices	\$										
	Invoice number										
	Status		~								
						Search					
Reference	Invoice number	Sta	tus	Descrip	tion		Date Issued	Due Date	Total	Paid	Currency
0006	INV-2018-00001	13 Voi	d	Scheme	Registration 1	B, 2A, 2B, 3, 4A1, 4A2, 6, 7, iED	11-Oct-2018	10-Nov-2018	165.00		GBP
0006A	INV-2018-00001	4 Aw	aiting Paymer	nt <u>Scheme</u>	Registration 1	B, 2A, 2B, 3, 4A1, 4A2, 6, 7, iED	11-Oct-2018	10-Nov-2018	162.50	50.00	GBP

Description of Invoice Table

Reference	An internal UK NEQAS for H&I reference number
Invoice Number	The unique UK NEQAS for H&I invoice number
Status	The status of the invoice:
	Draft: A draft invoice is prepared after registration is complete. Please
	note payment is not required until invoices have been finalised by UK
	NEQAS for H&I and formally issued.
	Awaiting Payment: Invoice have been formally issued and requires
	payment
	Paid: Full payment has been made against the invoice
	Void: The invoice has been cancelled by UK NEQAS for H&I
Description	A description of the items the invoice contains
Date Issued	Date of invoice issue
Date Due	The due date for payment
Total	The total invoice amount
Paid	Any amounts received by UK NEQAS for H&I
Currency	All Invoices are issued in £ GBP

Note: There may be more than one invoice per year, e.g. if extra schemes are added or changes to delivery are made after initial invoicing.



• Click on an invoice to view further details and a breakdown of costs.

Note: Clicking on the blue highlighted 'Description' text will take you to the <u>Scheme</u> <u>Entries</u> page.

Description	Unit price Qu	antity Amount	
UK NEQAS for H&I Registration 2018 Scheme 1B - HLA-B27 Testing	0.00 1	0.00	^
Scheme 2A - Cytotoxic Crossmatching	110.00 1	110.00	
Scheme 3 - HLA Antibody Specificity Analysis	0.00 1	0.00	
Scheme 4A1 - HLA Typing at 1st Field Resolution	0.00 1	0.00	
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution	0.00 1	0.00	
Scheme 6 - HLA Antibody Detection	0.00 1	0.00	
Scheme 7 - HLA-B*57:01 Typing for Drug Hypersensitivity	0.00 1	0.00	
Scheme 8 - HLA Genotyping for Coeliac and other HLA associated diseases	0.00 1	0.00	
iED - Interpretive Clinical Scenarios	0.00 1	0.00	
Postage Fees	19.50 1	19.50	
· 7			Ň
	UK NEQAS for H&I Registration 2018 Scheme 1B - HLA-B27 Testing Scheme 2A - Cytotoxic Crossmatching Scheme 3 - HLA Antibody Specificity Analysis Scheme 4A1 - HLA Typing at 1st Field Resolution Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution Scheme 6 - HLA Antibody Detection Scheme 7 - HLA-B'57.01 Typing for Drug Hypersensitivity Scheme 8 - HLA Genotyping for Coeliac and other HLA associated diseases iED - Interpretive Clinical Scenarios Postage Fees	UK NEQAS for H&I Registration 2018 Scheme 1B - HLA-B27 Testing 0.00 1 Scheme 2A - Cytotoxic Crossmatching 110.00 1 Scheme 3 - HLA Antibody Specificity Analysis 0.00 1 Scheme 4A1 - HLA Typing at 1st Field Resolution 0.00 1 Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0.00 1 Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0.00 1 Scheme 6 - HLA Antibody Detection 0.00 1 Scheme 7 - HLA-B*57:01 Typing for Drug Hypersensitivity 0.00 1 Scheme 8 - HLA Genotyping for Coeliac and other HLA associated diseases 0.00 1 iED - Interpretive Clinical Scenarios 0.00 1	UK NEQAS for H&I Registration 2018 Scheme 1B - HLA-B27 Testing 0.00 1 0.00 Scheme 2A - Cytotoxic Crossmatching 110.00 1 110.00 Scheme 3 - HLA Antibody Specificity Analysis 0.00 1 0.00 Scheme 4A1 - HLA Typing at 1st Field Resolution 0.00 1 0.00 Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0.00 1 0.00 Scheme 6 - HLA Antibody Detection 0.00 1 0.00 Scheme 6 - HLA Antibody Detection 0.00 1 0.00 Scheme 7 - HLA-B*57:01 Typing for Drug Hypersensitivity 0.00 1 0.00 Scheme 8 - HLA Genotyping for Coeliac and other HLA associated diseases 0.00 1 0.00 iED - Interpretive Clinical Scenarios 0.00 1 0.00 1 0.00

Once issued, the official invoice from UK NEQAS for H&I (issued by our host Velindre University NHS Trust) can be accessed by clicking on the document in the 'attachment' field. This document can be printed and saved as necessary to organise payment.

A copy of the invoices will be sent via email to the address in the finance details if provided, if not it will be sent to the main lab contact email address as default.

A breakdown of the invoice items is displayed on the right side of the page. Clicking on any item gives further information about that item.

At the bottom of the page are details of any payment(s) received by UK NEQAS for H&I.

Note: Received Invoice Payments are only updated when the information is provided by our finance team, therefore there may be a delay between a payment to UK NEQAS for H&I being made and it showing in the system.