

# UK NEQAS

Histocompatibility & Immunogenetics



## Participant System User Guide - Agents/Distributors

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## 1. Introduction

The UK NEQAS for H&I Participant System allows users to manage their EQA Scheme participation. This includes:

- Result entry
- Access to Reports
- Manage registration details
- Annual re-registration
- Complete CAPA forms
- View fees and invoices

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

A link to the system can be found on the UK NEQAS for H&I webpage <https://negas.welsh-blood.org.uk/> or by typing <https://uknegashandi.nagoda.cloud> into an internet browser.

## 2. Key Notes for the System

Mandatory fields within the system are highlighted with a \*.

Once logged in to the system clicking on the [UK NEQAS for H&I](#) text in the top right corner will return you to the home page.

Clicking on any of the table 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 [uknegashandi@wales.nhs.uk](mailto:uknegashandi@wales.nhs.uk).

## 3. System Basics

### 3.1. Accessing the System

Navigate to the login page from the link on the UK NEQAS for H&I website.

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

*Note: If you are not yet a participant of UK NEQAS for H&I, follow the [new agent registration process](#) (section 4.3).*

- If you are a new user, you will be told that the password assigned to you has expired.

- Please create a password noting the following: passwords should be at least eight characters long including at least one uppercase character, one symbol and one 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 with a temporary password, please use this to login.

When accessing the system with a temporary password, a notification will appear that your password has expired. Please create a new password, you will then receive the following message:



### 3.3. Home Page

After successful login you will be taken to your distributor homepage. Here you can easily view any 'unread' notices.



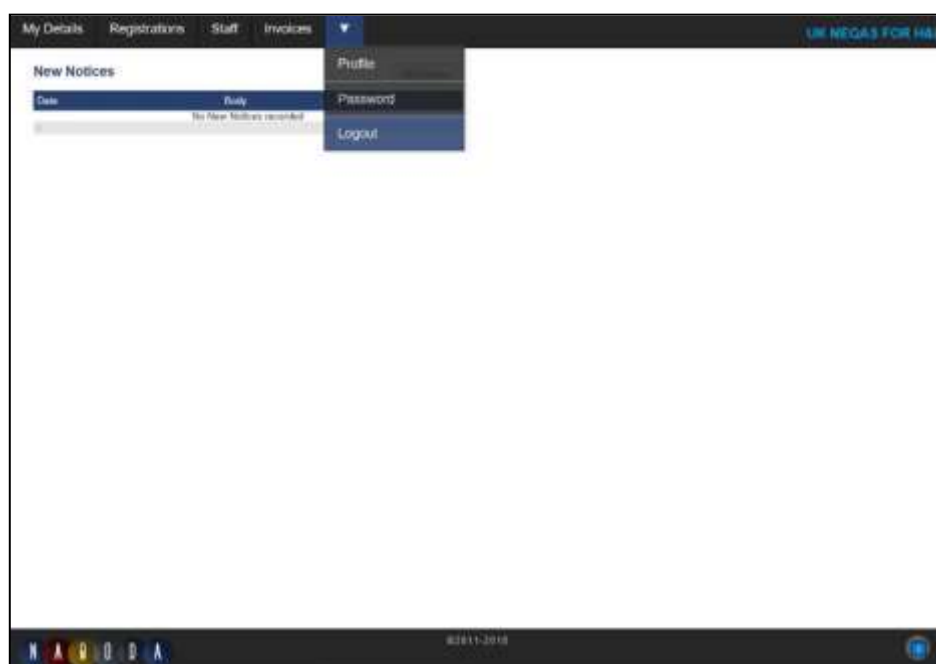
The main menu at the top of the page can be used to access all functions of the system.

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: users will automatically be logged out of the system after 60 minutes of inactivity.*



### 3.5. My Information

The [My Details](#) menu displays the general contact details of the Agent/Distributor.

The 'name' of the Agent, as assigned by UK NEQAS for H&I is displayed here. Information can be edited here. Ensure to click '[save](#)' if any updates are made.

### 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

To change your password.

- 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.*

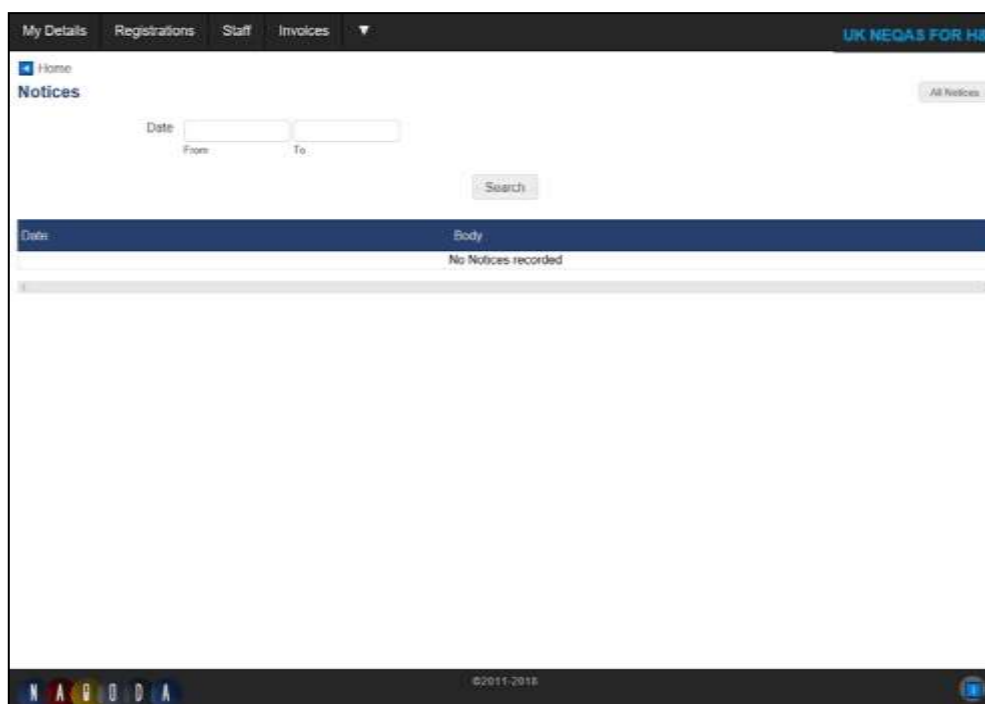
Your password has now been updated.

### 3.8. Notices

New notices from UK NEQAS for H&I are displayed on the homepage when a user login to the system.

Click on a notice to mark it as 'read' and remove it from the homepage.

To view previously read notices click on [All Notices](#).



In the [Notices](#) page you can search for a specific notice by date.

Use the [All Notices](#) button and the [Notices](#) button, which displays the number of 'unread' messages, to switch between viewing 'read' and 'unread' notices.

Click on a message to mark it as 'read' or 'unread'.

## 4. Registrations

### 4.1. All Labs

The Scheme Registration page contain the information required to register a lab under an Agent/Distributor for schemes provided by UK NEQAS for H&I.

- Click on [Registration](#) from the top menu, then select [All Labs](#).

My Details	Registrations	Staff	Invoices		UK NEQAS FOR H&I
<b>Scheme Registration</b>					
Distribution year:	Lab	Date	Scheme Entries	Status	
2018	NewLab1	08-Nov-2018	0	Pending	
2018	New Lab 2	08-Nov-2018	0	Pending	

Once a new lab registration has been approved by UK NEQAS for H&I office it will appear in the Scheme Registration page. The status will appear as 'Pending'.

Click the row of the relevant lab, a Scheme Registration page will open:



The screenshot shows the 'Scheme Registration' page with a progress bar at 25% completed. The 'General Information' section includes a warning about outstanding payments. Fields for 'Lab \*' (NewLab1), 'Address \*' (New Lab, New Lab Street, NL1 1NL, City, NewLabTown, State/Region, United Kingdom, Country), 'Date \*' (06-Nov-2018), and 'Distribution year \*' (2018) are visible. Navigation buttons 'Next >' and 'Save And Continue Later' are at the bottom.

- Progress through the pages using the [save and continue to next scheme button](#).
- **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 the 'Entries' tickbox.

The screenshot shows the 'Scheme Registration' page with a progress bar at 50% completed. The 'Registration' section contains delivery notes. The 'Schemes' section lists various testing schemes with checkboxes for 'Entries', 'Material', 'Samples Delivery', and 'Fee'.

Scheme	Entries	Material	Samples Delivery	Fee
Scheme 1A - HLA Phenotyping 0 out of 5 distributions remaining	<input type="checkbox"/>			
Scheme 1B - HLA-B27 Testing 0 out of 6 distributions remaining	<input checked="" type="checkbox"/>	Blood samples	Courier	£0
Scheme 2A - Cytotoxic Crossmatching 0 out of 5 distributions remaining	<input type="checkbox"/>			
Scheme 2B - Crossmatching by Flow Cytometry 0 out of 5 distributions remaining	<input type="checkbox"/>			
Scheme 3 - HLA Antibody Specificity Analysis 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 4A1 - HLA Typing at 1st Field Resolution 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 5A - HFE Typing 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 6B - Interpretative: HFE Genotype and HH 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 6 - HLA Antibody Detection	<input type="checkbox"/>			



*Note: Once registration is finalised, schemes may be added or removed at any point during the distribution year (see section 4.4.2 for more information on [adding and removing schemes during a distribution year](#)).*

The relevant Scheme fee (excluding delivery fees) is displayed in the final column. If a lab is joining part way through a distribution year, the displayed fees are based on the number of distributions remaining.

*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 the lab for the scheme and it will be included in any subsequent distributions.*

- The 'material' column shows the material that is distributed for each scheme. If you wish to register a lab for Scheme 1A, 1B, 2A or 2B and it is located outside the UK and Ireland, please select if you wish to receive Whole Blood or Isolated Lymphocyte samples (please note that a surcharge is applicable for isolated lymphocyte 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 'quickest' 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 the 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 different address.

The screenshot shows the 'Scheme Registration' page with a progress bar at 75% completed. The page includes sections for 'Redirection Information', 'Scheme Entries', and 'Terms & Conditions'. The 'Scheme Entries' section contains a table for 'Scheme Entry Administrator' with columns for Scheme Entry, First Name, Last Name, Telephone, and Email. The 'Terms & Conditions' section has a checkbox for 'Tick to accept T&C's' and a link to 'Terms & conditions'.

Scheme Entry	First Name	Last Name	Telephone	Email
1B Scheme 1B - HLA-B27 Testing	Staff	New Lab	1111111111	Staff1@NewLab.com

Navigation buttons: < Previous, Next >, Save And Continue Later

- 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.
- 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.
- **Page 4 Almost Done:** Save the information completed so far by clicking [submit](#).

The screenshot shows the 'Scheme Registration' page with a progress bar at 100% completed. The page displays the message 'Almost done' and a button to 'Click the button below to confirm your registration'. The navigation buttons are '< Previous' and 'Submit'.

You now be returned to the Scheme Registration page where you will notice the registration has been updated and the status of the registration has changed to 'Completed'.

My Details Registrations Staff Invoices ▼ UK NEQAS FOR H&I				
Registration updated				
Scheme Registration				
Distribution year	Lab	Date	Scheme Entries	Status
2018	NewLab1	08-Nov-2018	1	Completed
2018	New Lab 2	08-Nov-2018	0	Pending

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 the 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. New Lab Registrations

- Click on [Registration](#) from the top menu, then select [New Registrations](#).

The 'New Lab Registration' entries page allows you to enter the details of any labs you wish to distribute to. Click Add to register a new lab.

My Details	Registrations	Staff	Invoices	▼	UK NEQAS FOR H&I
------------	---------------	-------	----------	---	------------------

**New Lab Registration - Add**

33% completed

**General Information**

Status \*  
Pending

Agent \*  
New Agent

Address \*

Street

City Postal code

State/Region

United Kingdom

Country

Registration Date \*  
08-Nov-2018

Distribution year \*

Next >

Cancel

- **Page 1 General Information:** Submit an address and select a distribution year. Click Next to progress to the next screen or cancel to exit without saving.
- **Page 2 Contact Information:** Submit personnel details in this screen.
- **Page 3 Scheme Information:** Indicate the Scheme(s) you would like to register the lab for.
  - The 'material' column shows the material that is distributed for each scheme. If you wish to register for Scheme 1A, 1B, 2A or 2B for a laboratory from outside the UK and Ireland, please select if you wish to receive Whole Blood or Isolated Lymphocyte samples (please note that a surcharge is applicable for isolated lymphocyte samples).
  - Select the method of sample delivery. This page takes into account the chosen delivery options, the number of distributions and any schemes distributed on the same date.
  - If you wish to include any special comments about your registration, please complete these in the 'notes' box.
  - Click submit when you have finished.

My Details Registrations Staff Invoices ▼ UK NEQAS FOR H&I

### New Lab Registration

100% completed

#### Scheme Information

Please indicate the schemes you intend to register for.

Scheme Registration

Scheme	Entries	Material	Samples Delivery	Fee
Scheme 1A - HLA Phenotyping 0 out of 5 distributions remaining	<input type="checkbox"/>			
Scheme 1B - HLA-B27 Testing 0 out of 6 distributions remaining	<input type="checkbox"/>	Blood samples ▼		£0
Scheme 2A - Cytotoxic Crossmatching 0 out of 5 distributions remaining	<input type="checkbox"/>		First Class Special Delivery (SD) 9am Special Delivery (SD) 1pm Courier 10:30 am Courier noon Courier	
Scheme 2B - Crossmatching by Flow Cytometry 0 out of 5 distributions remaining	<input type="checkbox"/>			
Scheme 3 - HLA Antibody Specificity Analysis 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 4A1 - HLA Typing at 1st Field Resolution 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 5A - HFE Typing 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 5B - Interpretative: HFE Genotype and HH 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 6 - HLA Antibody Detection 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 7 - HLA-B*57:01 Typing for Drug Hypersensitivity 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 8 - HLA Genotyping for Coeliac and other HLA associated diseases 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 9 - KIR Genotyping 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 10 - HPA Genotyping 0 out of 2 distributions remaining	<input type="checkbox"/>			
Scheme 11 - HPA Antibody Detection/Specification	<input type="checkbox"/>			

- Click on [Registration](#) from the top menu, then select [New Registrations](#).

Once Labs have been entered you will see them listed in the 'New Lab Registrations' page. Click on the down arrow on the right side to 'view' the Lab details:

My Details Registrations Staff Invoices ▼								UK NEQAS FOR H&I	
New Lab Registrations								Add	All Registrations
Registration Date	City	Country	First name	Last name	Email	Distribution year	Scheme Registration		
08-Nov-2018	New Lab Street	United Kingdom	Staff	New Lab	Staff1@NewLab.com	2018	1		
08-Nov-2018	New Lab2 Street	United Kingdom	New Lab2	Staff	Staff1@NewLab2.com	2018	2	View	

Click on 'Add' button to register further labs. Click on the 'All Registrations' button to search labs by status:

My Details

Registrations

Staff

Invoices

UK NEQAS FOR H&I

New Lab Registrations

Add

All Registrations

Status

Pending

Search

Registration Date	City	Agent	Country	First name	Last name	Email	Distribution year	Scheme Registration	Status
08-Nov-2018	New Lab Street	New Agent	United Kingdom	Staff	New Lab	Staff1@NewLab.com	2018	1	Pending
08-Nov-2018	New Lab2 Street	New Agent	United Kingdom	New Lab2	Staff	Staff1@NewLab2.com	2018	2	Pending

Labs will be classes as 'Pending' until they have been approved by UK NEQAS for H&I office.

Note: Until labs have been approved by UK NEQAS for H&I office you can only view them in this screen.

### 4.3. New Agent Registration Process

Agents/Distributors 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 System home page click on [New Agent Registration](#).

Complete the relevant information for the Agent you wish to register, progressing through the pages by clicking the **Next** button.

- **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 addresses/telephone number, etc. 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 Agent.*

- **Page 3 Scheme Registration:** Select the UK NEQAS for H&I Schemes you are interested in joining. Add approximately how many laboratories you would wish to act as a distributor for so NEQAS for H&I can consider this in their logistics and planning.

Scheme	Number of labs
<b>Scheme 1A - HLA Phenotyping</b> 0 out of 5 distributions remaining	
<b>Scheme 1B - HLA-B27 Testing</b> 0 out of 6 distributions remaining	
<b>Scheme 2A - Cytotoxic Crossmatching</b> 0 out of 5 distributions remaining	
<b>Scheme 2B - Crossmatching by Flow Cytometry</b> 0 out of 5 distributions remaining	
<b>Scheme 3 - HLA Antibody Specificity Analysis</b> 0 out of 2 distributions remaining	
<b>Scheme 4A1 - HLA Typing at 1st Field Resolution</b> 0 out of 2 distributions remaining	
<b>Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution</b> 0 out of 2 distributions remaining	
<b>Scheme 5A - HFE Typing</b> 0 out of 2 distributions remaining	

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

- 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 Agent homepage.

- Complete the [New Lab Registrations](#) (section 4.1) for all labs you wish to distribute to.

*Note: On the Scheme Registration page ([Registration- Scheme Registration](#)) new laboratories 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'.*

## **4.4. Amending Registration**

### **4.4.1. Introduction**

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](#) (non-UK participants only)

Changes to registration can only be made by an agent primary user.

### **4.4.2. Add/Remove Schemes**



Schemes can be added or removed from a lab registration at any time during the distribution year. For new schemes, a 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. Scheme fees are reduced to reflect the number of remaining distributions. If a lab requires 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 [Registrations](#) and [All Labs](#).
- Click on the lab 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 (non-UK labs for 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.
- On the final registration page, save the information completed by clicking [submit](#).

#### **4.4.3. Change delivery or sample material**

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

A sample material option is only available to non-UK participants, who have the option of isolated lymphocyte samples or whole blood samples for certain schemes. Isolated lymphocyte samples incur an additional fee. If you are unsure of the best sample material for a 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 'quickest' 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 [Registrations](#) and [All Labs](#).
- Click the lab you wish to amend.
- Progress through the registration pages to the scheme selection page (page 2).
- 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.
- On the final registration page, save the information completed by clicking [submit](#).

#### **4.4.4. Amend Scheme Assessment Criteria**

Schemes analytes for assessment can be altered at any time during the distribution year (e.g. if a lab would like to test an additional HLA Loci). *Changes to scheme analytes can only be made within the system by a lab primary user.* They will need to access the system using their log on details. Please refer the lab to the Participant System User Guide specifically for laboratories.

### **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 agent'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 [cancel participation](#) is received (see section 4.7). 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 an agent primary user.*

- To access the registration forms, click '[Registrations](#)' and '[All Labs](#)'
- 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 a laboratory name to access the registration forms.



Distribution year	Lab	Date	Scheme Entries	Status
2019	New Lab	31-Oct-2018	1	Pending
2019	New Lab	31-Oct-2018	1	Pending

- Progress through the registration pages, checking all details and making updates as necessary. Scheme assessment criteria also need to be confirmed (see section 4.1 for a full explanation of the [registration pages](#)).

During re-registration we would also recommend checking the [staff members with access](#) to the EQA system (section 5.1) to remove any users for whom access is no longer relevant.

#### **4.6. Registration Certificate**

Any time after initial registration is complete, a lab registered under an agent/distributor can produce a certificate of registration. They will need to access the system using their log on details to produce/view the certificate. Please refer the lab to the Participant System User Guide specifically for laboratories.

*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 from being a distributor for UK NEQAS for H&I Schemes please contact UK NEQAS for H&I office.

Should you wish to remove a lab from your distribution list please contact the UK NEQAS for H&I office.

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

## 5. Staff

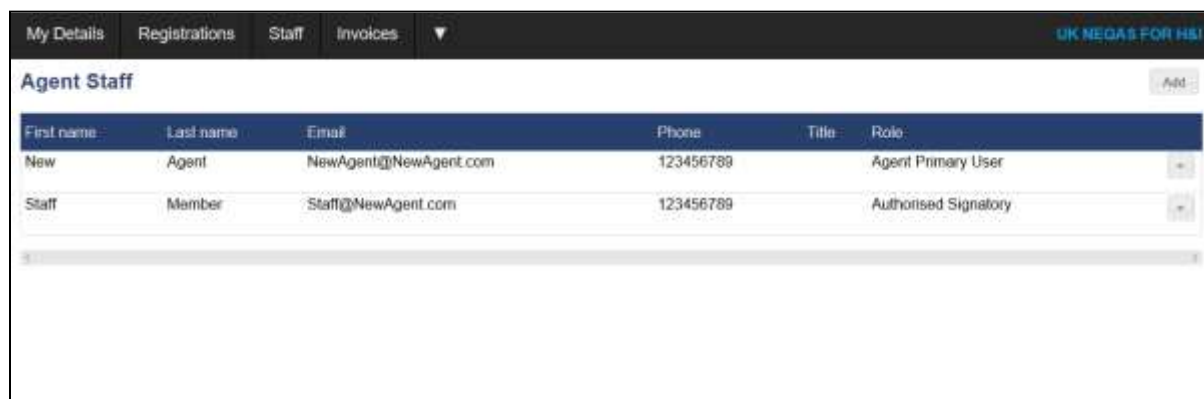
### 5.1. Introduction

- Click on [Staff](#) from the top menu

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

Two different user access levels have been created to allow companies 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.*



First name	Last name	Email	Phone	Title	Role
New	Agent	NewAgent@NewAgent.com	123456789		Agent Primary User
Staff	Member	Staff@NewAgent.com	123456789		Authorised Signatory

### User Roles

**Agent 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 company as an agent/distributor, add/remove users to the system and manage EQA participation.

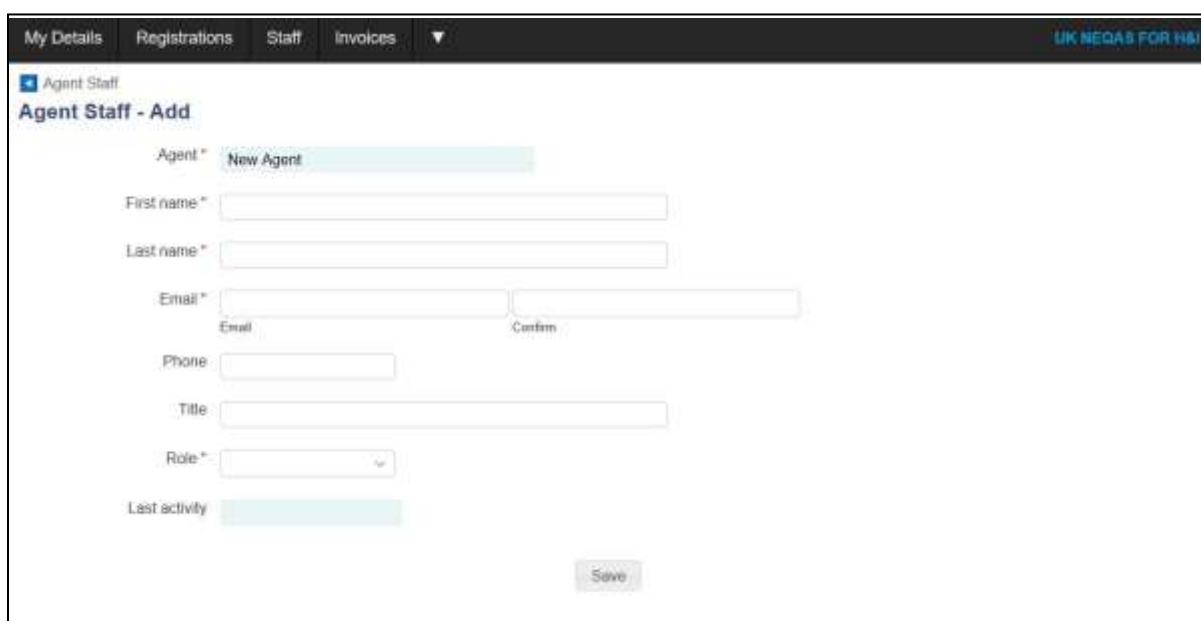
This role is assigned to the individual who completes new registrations.

*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.*

**Authorised Signatory:** Staff that have this role are actually not classed as users in the system as they do not have an email address.

## 5.2. Adding A New User

- Click on the [Add](#) button in the top right corner of the 'Staff' homepage.



The screenshot shows the 'Agent Staff - Add' form. At the top, there is a navigation bar with 'My Details', 'Registrations', 'Staff', and 'Invoices'. The 'Staff' tab is selected. The form title is 'Agent Staff - Add'. The form fields are: 'Agent' (pre-filled with 'New Agent'), 'First name', 'Last name', 'Email' (with a 'Confirm' field), 'Phone', 'Title', 'Role' (a dropdown menu), and 'Last activity'. A 'Save' button is located at the bottom right of the form.

- Complete the required name and contact information and select the relevant [user role](#) (see section 5.1).
- Once all required information is complete, click [save](#) and the staff member will be sent an e-mail detailing how to access the system.

## 5.3. Editing User Details/Role

Agent primary Users can edit any user contact details (e.g. name, e-mail address) and change the [user role](#) of staff.

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

- Click on the relevant staff member from the [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 section 5.1 for further information on [user roles](#).

- Click [save](#) to save any changes.

## 5.4. Add/Remove Assigned Schemes

- Click on [Registrations](#) then [All Labs](#) and select the relevant laboratory from the list. The laboratories registration page (see Section 4.1) will open. Check the details entered and proceed to Page 2 Registration, schemes can be removed or added from this page.

Scheme	Number of labs
Scheme 1A - HLA Phenotyping 0 out of 5 distributions remaining	
Scheme 1B - HLA-B27 Testing 0 out of 6 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	
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	

Continue on to Page 3, Redirection Information, scheme entry administrator information can be amended on this page. The name, telephone and email address can be edited but the address field would need to be changed by the laboratory themselves. Please refer them to the Participant User Guide for Laboratories.

Scheme Entry	First Name	Last Name	Telephone	Email
1B Scheme SKML - HLA-B27 Testing	Name here	Name here		

Tick to accept T&C's ☐ [Terms & Conditions](#)

[< Previous](#) [Next >](#) [Save And Continue Later](#)

*Note changes can only be made by agent primary users.*

## 5.5. Remove a User

Agent 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 [Staff](#) homepage, click on the drop down arrow next to the user to be removed.
- 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 removed from the list of users in the 'Agent Staff' homepage.

## 6. Invoices

Agent 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. You can search the invoices listed by 'Status' or by typing the invoice number into the 'Invoice number' field.

The screenshot shows the 'Invoices' page of the UK NEQAS for H&I system. At the top, there is a navigation bar with 'My Details', 'Registrations', 'Staff', and 'Invoices'. The 'Invoices' section is active. Below the navigation bar, there is a search area with an 'Invoice number' input field and a 'Status' dropdown menu. The 'Status' dropdown is open, showing options: 'Draft', 'Awaiting Payment', 'Paid', and 'Void'. A 'Search' button is also present. Below the search area is a table of invoices. The table has the following columns: 'Reference', 'Invoice number', 'Status', 'Description', 'Date Issued', 'Due Date', 'Total', 'Paid', and 'Currency'. One invoice is listed with the following details: Reference 0009, Invoice number INV-2018-000029, Status Draft, Description Scheme Registration 1B, 2A, 2B, 3, 4A1, 4A2, 6, 7, 8, IED, Date Issued 30-Oct-2018, Due Date 29-Nov-2018, Total 5,190.00, and Currency GBP.

### Description of Invoice Table

<b>Reference</b>	A UK NEQAS for H&I reference number for the invoice
<b>Invoice Number</b>	The unique UK NEQAS for H&I reference number of the invoice
<b>Status</b>	The status of the invoice:



	<p><b>Draft:</b> 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&amp;I and formally issued.</p> <p><b>Awaiting Payment:</b> Invoice have been formally issued and requires payment</p> <p><b>Paid:</b> Full payment has been made against the invoice</p> <p><b>Void:</b> The invoice has been cancelled by UK NEQAS for H&amp;I</p>
<b>Description</b>	A description of the items the invoice contains
<b>Date Issued</b>	Date of invoice issue
<b>Date Due</b>	The due date for payment
<b>Total</b>	The total invoice amount
<b>Paid</b>	Any amounts received by UK NEQAS for H&I
<b>Currency</b>	All Invoices are issued in GBP

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

- Click on an [invoice number](#) to view further details.

*Note: Clicking on the blue highlighted description text will take you to the [Scheme Entries](#) page.*

**Invoice**

To:

Attachment: [Invoice.docx](#)

Invoice number: INV-2018-000021

Description: Scheme Registration 1B, 2A, 3, 4A1, 4A2, 6, 7, 8, IED

Date issued: 22-Oct-2018

Due date: 21-Nov-2018

Currency: GBP

Sub Total: 129.50

Tax: 25.98

**Invoice Payments**

Date	Reference	Amount	Notes
No Invoice Payments recorded			

**Invoice Items**

Description	Unit price	Quantity	Amount
UK NEQAS for H&I Registration 2016 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 Coskac 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

Once issued, the official invoice from UK NEQAS for H&I (issued by our host Velindre 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 breakdown of the invoice items is displayed on the right side of the page. Clicking on any item gives further information about that item.

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

*Note: Received payments are only updated weekly, so it might take several days for a payment to UK NEQAS for H&I to show in the system.*