

UK NEQAS

Histocompatibility & Immunogenetics



Participant Portal User Guide

Contents

1. [Introduction](#)
2. [Key Notes for the System](#)
3. [System Basics](#)
 - 3.1. [Accessing the System](#)
 - 3.2. [Forgotten Password](#)
 - 3.3. [Home Page](#)
 - 3.4. [Exiting the System](#)
 - 3.5. [My Lab Information](#)
 - 3.6. [View User Profile](#)
 - 3.7. [Password Change](#)
 - 3.8. [Notices/Messages](#)
4. [Registration](#)
 - 4.1. [Scheme Registration Pages](#)
 - 4.2. [Scheme Entries](#) (assessment criteria)
 - 4.3. [New Laboratory Registration Process](#)
 - 4.4. [Amending Registration](#)
 - 4.4.1. [Add/Remove Schemes](#)
 - 4.4.2. [Change Delivery or Sample Material](#)
 - 4.4.3. [Amend Scheme Assessment Criteria](#)
 - 4.5. [Annual Re-registration](#)
 - 4.6. [Registration Certificate and Scheme fee Quotation](#)
 - 4.7. [Cancellation of Participation](#)
5. [Staff](#)
 - 5.1. [Adding a New User](#)
 - 5.2. [Editing User Details/Role](#)
 - 5.3. [Add/Remove Assigned schemes](#)
 - 5.4. [Remove a User](#)
6. [Result Entry](#)
 - 6.1. [Entering Results](#)
 - 6.2. [Method Pages](#)
 - 6.3. [Result Entry Pages](#)
 - 6.4. [View/Save/Print Entered Results](#)
 - 6.5. [Submit Previously Saved Results](#)
 - 6.6. [Editing Submitted Results](#)
7. [Assessment Reports](#)
 - 7.1. [Performance Tables](#)
 - 7.2. [Rolling Summary](#)
 - 7.3. [Unsatisfactory Performance/CAPA](#)
 - 7.4. [Annual Performance Certificate](#)
8. [Invoices](#)

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: <https://neqas.welsh-blood.org.uk/> or by visiting: <https://uknegashandi.naqoda.cloud>.



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 and 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 uknegashandi@wales.nhs.uk.

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 [new laboratory registration process \(section 4.3\)](#).

- **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 no-reply.uknegashandi@welsh-blood.org.uk 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.

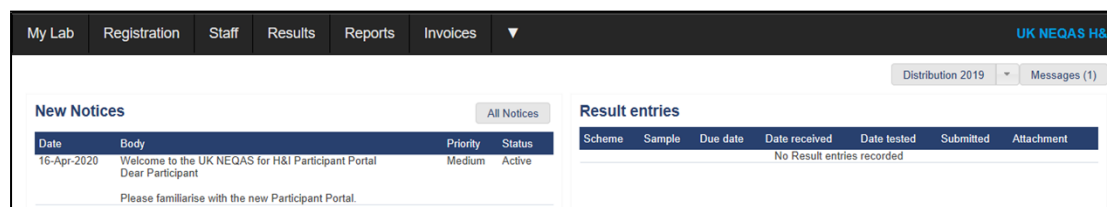
The link in the email will take you to a page which will show a notification informing that your password has expired. Please create a new password (following the guidance in [section 3.1](#)), you will then receive the following message:



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).



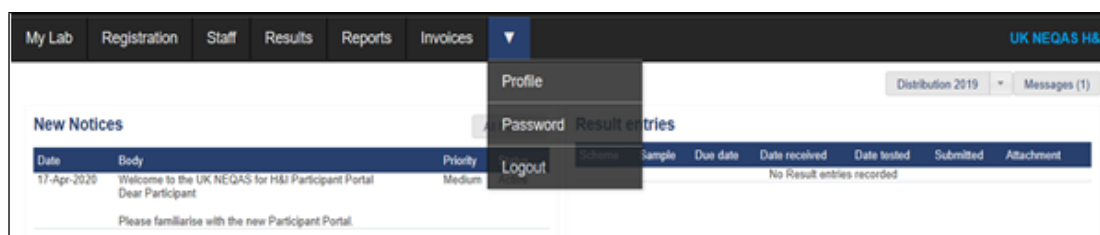
The main menu buttons at the top of the page can be used to access all functions of the system. The buttons you see will depend on your user access (see [section 5](#)).

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.



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 (Lab ID) 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.

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

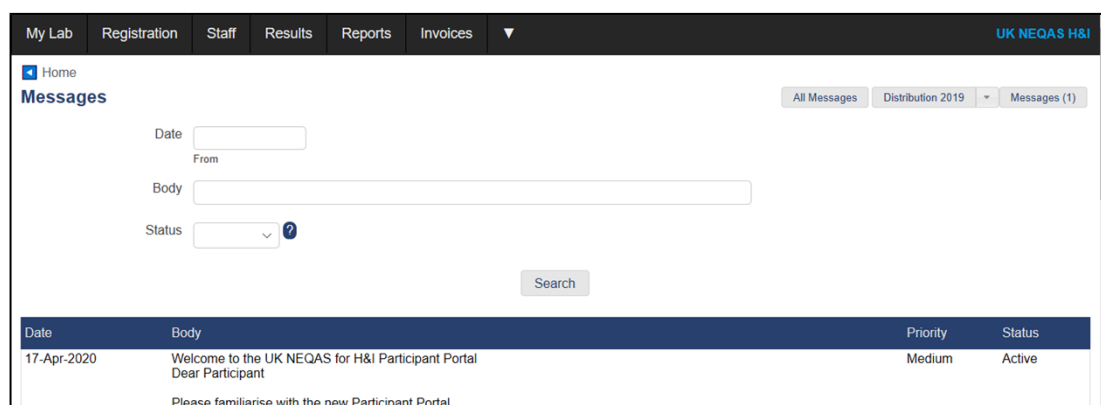
- Click the [drop down arrow](#) from the top menu and select [Password](#).
- Enter your new password twice and click [Save](#).

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](#).



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](#).

Distribution year	Lab	Date	Agent	Scheme Entries	Status
2019	WELSH BLOOD SERVICE	08-Mar-2019		14	Completed
2018	WELSH BLOOD SERVICE	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 [schemes' assessment criteria](#) ([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 [section 4.4.1](#) 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 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	Fee
Scheme 1A - HLA Phenotyping 0 out of 5 distributions remaining	<input checked="" type="checkbox"/>	Blood samples ▾	First Class ▾	£ 0
Scheme 1B - HLA-B27 Testing 0 out of 5 distributions remaining	<input type="checkbox"/>			
Scheme 2A - Cytotoxic Crossmatching 0 out of 5 distributions remaining	<input checked="" type="checkbox"/>	Blood samples ▾	Courier ▾	£ 0
Scheme 2B - Crossmatching by Flow Cytometry 0 out of 5 distributions remaining	<input checked="" type="checkbox"/>	Blood samples ▾	▾	£ 0
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 checked="" type="checkbox"/>	Blood samples ▾	▾	£ 0
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution 0 out of 2 distributions remaining	<input checked="" type="checkbox"/>	Blood samples ▾	▾	£ 0
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	<input type="checkbox"/>			

- 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 different address.

Scheme Registration

43% completed

Scheme 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.

Scheme Entries

Scheme Entry	Scheme Entry Administrator			
	First Name	Last Name	Telephone	Email
1A Scheme 1A - HLA Phenotyping	Test	Example	0123456789	test.example@nhs.com
	Add another address			
1B Scheme 1B - HLA-B27 Testing	Test	Example	0123456789	test.example@nhs.com

- 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 [access to the Participant Portal](#) after registration is completed, if required ([section 5](#))

- 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).

Scheme Registration

71% completed

Invoice Information

We recommend that you supply a Purchase Order Number with your registration (where applicable).
Invoices issued without a valid Purchase Order Number will not be re-issued.
A quote will be available once your registration is completed - this can be found using the drop-down arrow to the right side of the relevant distribution year (Registration tab > Scheme Registration)

Invoices are issued by our host organisation, Velindre University NHS Trust, and sent to the e-mail listed on file.
Please do not send payment until the invoice has been issued.
Participants with unpaid invoices will be suspended until full payment is received.

Purchase order *

☒ I want to specify a purchase order number now
☐ I will provide a purchase order number at a later date
☐ My institution does not require a purchase order number

Purchase order number

Invoice Address *

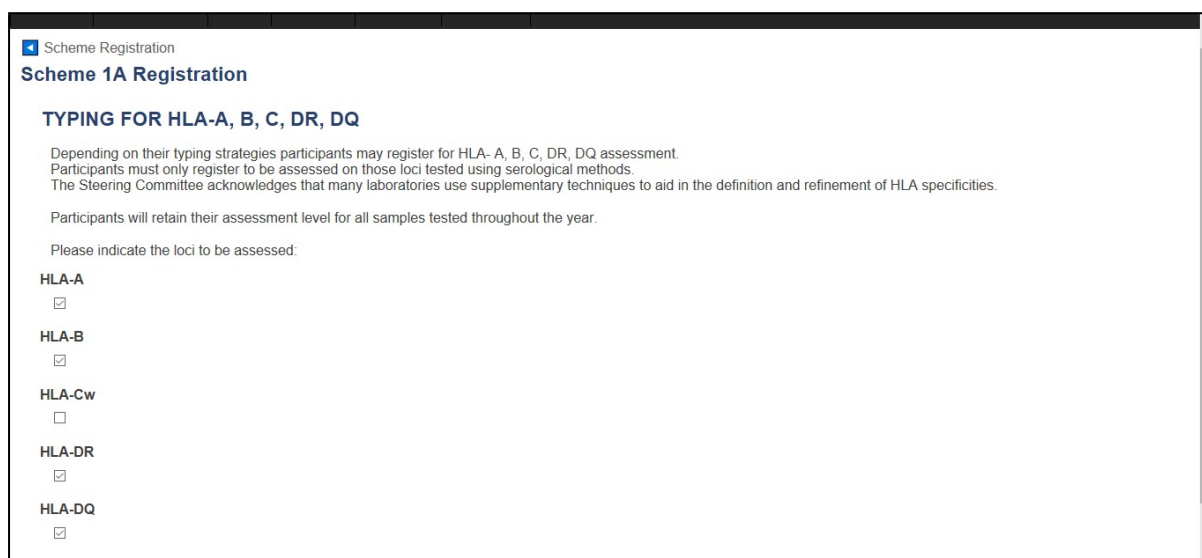
H&I Lab Pathology Department Hospital X Hospital Road, Hospital Way, AB12 3CD

Invoice Notes

- 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.
- 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)



The screenshot shows a web form titled 'Scheme 1A Registration' under the heading 'Scheme Registration'. The section is 'TYPING FOR HLA-A, B, C, DR, DQ'. It contains explanatory text about registration requirements and a list of HLA loci with checkboxes. The checkboxes for HLA-A, HLA-B, HLA-DR, and HLA-DQ are checked, while HLA-Cw is unchecked.

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-B ☒

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 [Scheme entries](#) (see [section 4.2](#)).

- 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 NEQAS FOR H&I

Scheme Entries

Scheme

Year	Scheme	Postage Type	Material	Status	Participation Notes
2018	Scheme 1A - HLA Phenotyping	First Class	Blood samples	Active	<input type="button" value="v"/>
2018	Scheme 2A - Cytotoxic Crossmatching	First Class	Blood samples	Active	<input type="button" value="v"/>
2018	Scheme 2B - Crossmatching by Flow Cytometry	First Class	Blood samples	Active	<input type="button" value="v"/>
2018	Scheme 4A1 - HLA Typing at 1st Field Resolution	Courier	Blood samples	Active	<input type="button" value="v"/>
2018	Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution	Courier	Blood samples	Active	<input type="button" value="v"/>

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

[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.

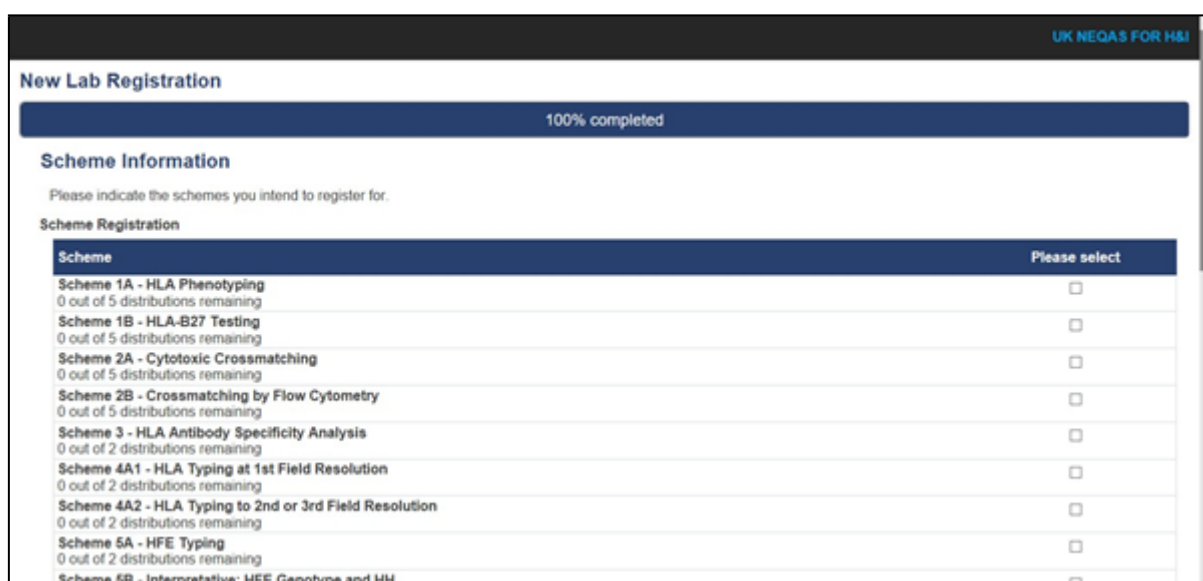
- **Page 1 General Information:** Address of the laboratory. This should be the primary laboratory address where the majority of samples will be sent.

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 [section 5 Staff](#)).

- **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.



The screenshot shows the 'New Lab Registration' page for UK NEQAS for H&I. A progress bar indicates '100% completed'. The 'Scheme Information' section prompts the user to 'Please indicate the schemes you intend to register for.' Below this is a table with the following columns: 'Scheme' and 'Please select'.

Scheme	Please select
Scheme 1A - HLA Phenotyping 0 out of 5 distributions remaining	<input type="checkbox"/>
Scheme 1B - HLA-B27 Testing 0 out of 5 distributions remaining	<input type="checkbox"/>
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 5B - Interpretative: HFE Genotype and HH	<input type="checkbox"/>

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 [Registration information](#) ([section 4.1](#)).

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 [system users](#) for your laboratory ([section 5](#)).

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 completed 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 [section 4.1](#) 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 completed by clicking [save and continue to scheme assessment criteria](#).

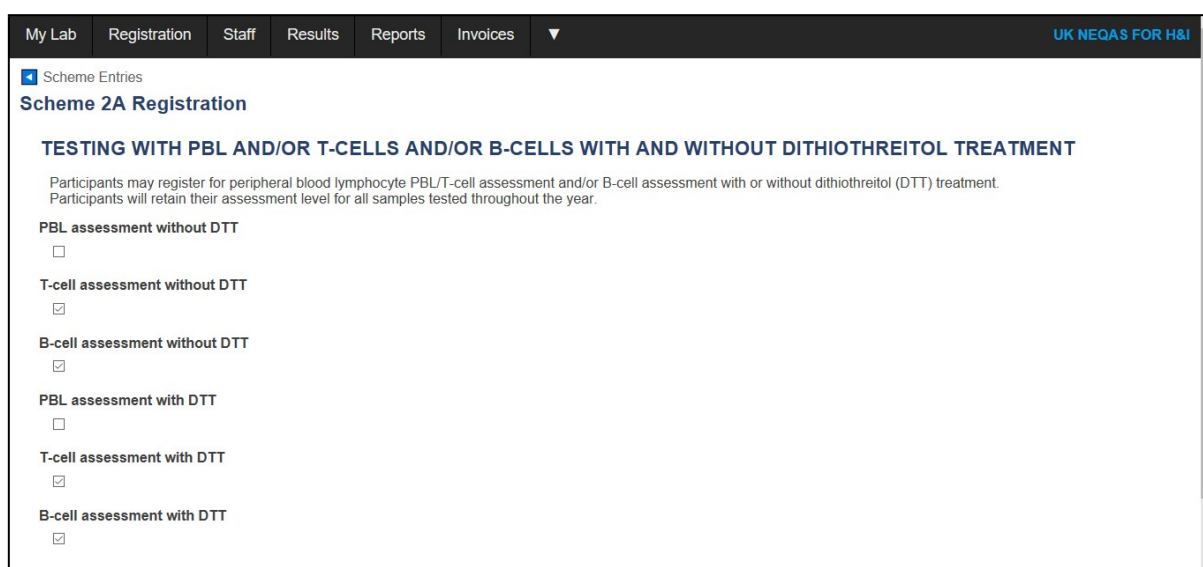
4.4.3. Amend Scheme Assessment Criteria

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.



The screenshot shows the 'Scheme Entries' page for 'Scheme 2A Registration'. The page title is 'TESTING WITH PBL AND/OR T-CELLS AND/OR B-CELLS WITH AND WITHOUT DITHIOTHREITOL TREATMENT'. Below the title, there is a paragraph explaining that participants may register for peripheral blood lymphocyte (PBL)/T-cell assessment and/or B-cell assessment with or without dithiothreitol (DTT) treatment, and that participants will retain their assessment level for all samples tested throughout the year. The form contains several checkboxes for different assessment types:

- PBL assessment without DTT: ☐
- T-cell assessment without DTT: ☒
- B-cell assessment without DTT: ☒
- PBL assessment with DTT: ☐
- T-cell assessment with DTT: ☒
- B-cell assessment with DTT: ☒

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 [cancel participation](#) is received ([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 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 [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](#)) 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 Registration							Distribution 2019 ▼
Distribution year	Lab	Date	Agent	Scheme Entries	Status		
2019	UK NEQAS for H&I	29-Apr-2020		1	Completed	<div> Certificate Quote </div>	

- 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 of 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 NEQAS FOR H&I					
Lab Staff Add					
First name	Last name	Email	Phone	Role	HOD
Test	Example	test.example@nhs.com	0123456789	Primary User	<input checked="" type="checkbox"/>
Tom	Jerry	tj@tj.com		Scheme User	<input type="checkbox"/>
Mickey	Mouse	mm@nhs.com		Report Recipient	<input type="checkbox"/>

User Roles

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:

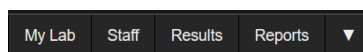
My Lab	Registration	Staff	Results	Reports	Invoices	▼
--------	--------------	--------------	---------	---------	----------	---

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:

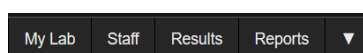


Note: We recommend having enough scheme users/primary users set up in the system for each scheme to allow results to be entered by one user and verified/submitted by a second user to minimise the risk of data entry errors. See [section 6.1 Result Entry](#) for further information on entering and submitting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



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

User Role	Participant Portal Function				
	Administer Registration/Scheme assessment criteria	Manage Users	Enter results	View reports	View Invoices
Primary User	✓	✓	✓ All Schemes	✓ All Schemes	✓
Scheme User	X	X	✓ Assigned Schemes only	✓ Assigned Schemes only	X
Report Recipient	X	X	X	✓ Assigned Schemes only	X

5.1. Adding A New User

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

The screenshot shows the 'Lab Staff - Add' form. At the top is a navigation bar with tabs: My Lab, Registration, Staff, Results, Reports, Invoices, and a dropdown arrow. The 'Staff' tab is active. The form title is 'Lab Staff - Add'. The form fields are: Lab (text box with 'Example Laboratory'), First name (text box), Last name (text box), Email (two text boxes labeled 'Email' and 'Confirm'), Phone (text box), HOD (checkbox), Role (dropdown menu), and Last activity (text box). 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](#). 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 [section 5.3 - Add/Remove assigned Schemes](#).

5.2. Editing User Details/Role

Primary Users can edit any user contact details (e.g. name, e-mail address) and change the [user role](#) 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 [section 5](#) for further information on [user roles](#).

- 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.

- Click on the relevant staff member from the [Lab Staff](#) homepage.

The Schemes the staff member are assigned to are shown on the right side of the page under 'Scheme Staff Links'.

Note changes can only be made by primary users.

To remove a Scheme from a user:

- Click on the relevant Scheme for removal and select [Delete](#).

The scheme will have been removed from the list of schemes for that user.

To Add a Scheme to a user

- Click on the [add](#) button at the top of the list of schemes.

A list of registered schemes that the user is not assigned to will be displayed.

- Tick the box next to the relevant scheme(s) to add to that user. Selected schemes will move to the list at the bottom of the page.

- To confirm the selection, click [Add selected Scheme Entries to Scheme Staff Link](#).

The selected scheme(s) will be added to the user.

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.

Description of Result Entries Table

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)

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 [section 7 Assessment Reports](#) and [7.1 Performance Tables](#))

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
▼

UK NEQAS FOR H&I

Result entries

Scheme

Status

Search

Scheme	Sample	Due date	Date received	Date tested	Status	Submitted	Attachment
Scheme 2B - Crossmatching by Flow Cytometry	01/2018	09-Mar-2018			Reports Published	<input type="checkbox"/>	
Scheme 2B - Crossmatching by Flow Cytometry	02/2018	09-Mar-2018			Reports Published	<input type="checkbox"/>	
Scheme 1B - HLA-B27 Testing	07/2018	22-Oct-2018	02-Oct-2018	09-Oct-2018	Pending Results	<input type="checkbox"/>	
Scheme 1B - HLA-B27 Testing	08/2018	22-Oct-2018	09-Oct-2018	09-Oct-2018	Pending Results	<input checked="" type="checkbox"/>	
iED - Interpretive Clinical Scenarios	03/2018	06-Nov-2018			Pending Results	<input type="checkbox"/>	
Scheme 2A - Cytotoxic Crossmatching	01/2018	30-Mar-2018			Assessment Completed	<input type="checkbox"/>	

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 ([see below](#)) 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.

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

Sample	Results entered and submitted by a single user		Results entered and submitted by two different users		Results entered and submitted by multiple users	
	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

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 [6.4. View/Save/Print Entered Results](#)

You will initially be taken through the method pages ([Section 6.2](#)) followed by the result entry pages ([Section 6.3](#)).

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 [assessment criteria](#) (see [section 4.4.3](#)). 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

Tested
☐ Fully tested
☐ Partially tested
☐ Not tested

Date received

Reason for non-testing

Confirm reason
 Please confirm reason for not testing.

User (data entry)
 User who entered the results data. Will automatically be updated.

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 entries Distribution 2019 ▼							
Scheme <input type="text"/> Status <input type="text"/>							
Search							
Scheme	Sample	Due date	Date received	Date tested	Status	Submitted	Attachment
Scheme 2B - Crossmatching by Flow Cytometry	01/2019	12-Apr-2019	03-Apr-2019	03-Apr-2019	Reports Published	<input checked="" type="checkbox"/>	▼
Scheme 2B - Crossmatching by Flow Cytometry	02/2019	12-Apr-2019	03-Apr-2019	04-Apr-2019	Reports Published	<input checked="" type="checkbox"/>	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 ▼ UK NEQAS FOR H&I							
Result entries							
Scheme <input type="text"/> Status <input type="text"/>							
Search							
Scheme	Sample	Due date	Date received	Date tested	Status	Submitted	Attachment
Scheme 2B - Crossmatching by Flow Cytometry	01/2018	09-Mar-2018			Reports Published	<input type="checkbox"/>	
Scheme 2B - Crossmatching by Flow Cytometry	02/2018	09-Mar-2018			Reports Published	<input type="checkbox"/>	
Scheme 1B - HLA-B27 Testing	07/2018	22-Oct-2018	02-Oct-2018	09-Oct-2018	Pending Results	<input type="checkbox"/>	
Scheme 1B - HLA-B27 Testing	08/2018	22-Oct-2018	09-Oct-2018	09-Oct-2018	Pending Results	<input checked="" type="checkbox"/>	

- To review and submit the results follow the guidance in section [6.4 Result Entry Pages](#)
- 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 [6.4 Result Entry Pages](#)
- 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 [section 2. Key Notes for the System](#)).

- 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 [section 2. Key Notes for the System](#)).

- 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 if you plan to download the results.

The performance table uses the following formatting to highlight results:

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

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.

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 [section 2. Key Notes for the System](#)).

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 summary					Zoom	1 Notice
Scheme	Test	Number tested	Number correct	Number assessed	Assessment	
Scheme 1A - HLA Phenotyping	*	2	2	3	66.7%	
Scheme 1B - HLA-B27 Testing	*	3	2	3	66.7%	
Scheme 2A - Cytotoxic Crossmatching	B cell with DTT	16	14	15	93.3%	
Scheme 2A - Cytotoxic Crossmatching	B cell without DTT	16	11	11	100%	
Scheme 2A - Cytotoxic Crossmatching	PBL with DTT	16	15	15	100%	
Scheme 2A - Cytotoxic Crossmatching	PBL without DTT	16	14	16	87.5%	
Scheme 2A - Cytotoxic Crossmatching	T cell with DTT	4	0	0	Not Assessed	
Scheme 2A - Cytotoxic Crossmatching	T cell without DTT	4	4	4	100%	
Scheme 2B - Crossmatching by Flow Cytometry	B cell	24	20	21	95.2%	
Scheme 2B - Crossmatching by Flow Cytometry	T cell	24	20	21	95.2%	
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution	2nd Field Resolution	0	0	0	Not tested	
Scheme 4A2 - HLA Typing to 2nd or 3rd Field Resolution	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 uknegashandi.org.uk), 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:

7. Action plan
How will you follow-up on these actions? What procedures will be used to review performance to ensure your corrective/preventative actions have been implemented successfully and effectively?

8. Lessons learnt
E.g. showing good practice being implemented.

Attachments
Please upload any supporting documents

Upload

PDF Adobe

CAPA supporting

Submit

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 > [Assessment Reports](#) (see [section 7](#)).

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 NEQAS FOR H&I

Invoices

Invoice number

Status

▼

Search

Reference	Invoice number	Status	Description	Date Issued	Due Date	Total	Paid	Currency
0006	INV-2018-000013	Void	Scheme Registration 1B, 2A, 2B, 3, 4A1, 4A2, 6, 7, iED	11-Oct-2018	10-Nov-2018	165.00		GBP
0006A	INV-2018-000014	Awaiting Payment	Scheme Registration 1B, 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	<p>The status of the invoice:</p> <p>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.</p> <p>Awaiting Payment: Invoice have been formally issued and requires payment</p> <p>Paid: Full payment has been made against the invoice</p> <p>Void: The invoice has been cancelled by UK NEQAS for H&I</p>
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 [Scheme Entries](#) page.

1 Notice

Invoice

To:

Attachment: [Invoice.docx](#)

Invoice number:

Description:

Date Issued:

Due Date:

Currency:

Sub Total:

Tax:

Invoice Items

Description	Unit price	Quantity	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

Invoice Payments

Date	Reference	Amount	Notes
No Invoice Payments recorded			

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.