TRAINING UPDATE

Lab Location:	GEC, SGMC & WAH	**Date Distributed:**	6/8/2015
Department:	Technical Staff , Mgmt & QA	**Due**	6/30/2015
		Implementation:	**7/1/2015**

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:
CAP Online Proficiency Testing GEC/ SGAH / WAH.QA26 v2
Description of change(s):
Section 5: A.1 registration / log in instruction and screen shot updated This revised SOP will be implemented on July 1, 2015

Document your compliance with this training update by taking the quiz in the MTS system.

Approved draft for training (version 2)

Non-Technical SOP

Title	**CAP Online Proficiency Testing**
Prepared by	Marilyn VanDegrift Date: 10/20/2009
Owner	Cynthia Bowman-Gholston Date: 10/20/2009

Laboratory Approval		
Print Name and Title	**Signature**	**Date**
Refer to the electronic signature page for approval and approval dates.		
Local Issue Date:	Local Effective Date:	

Review:		
Print Name	**Signature**	**Date**

Form revised 3/31/00

TABLE OF CONTENTS

---

1. PURPOSE

This procedure defines the process for online entry of proficiency testing (PT).

2. SCOPE

This procedure is utilized for Result Form management of PT surveys, and view / verify receipt of data.

3. RESPONSIBILITY

All laboratory staff, trained on the proper handling, testing, and reporting of PT results must comply with this procedure.

4. DEFINITIONS

CAP – College of American Pathologists

e-*LAB* Solutions – CAP online proficiency testing program for result management, interactive evaluations and summary reports

PT – proficiency testing

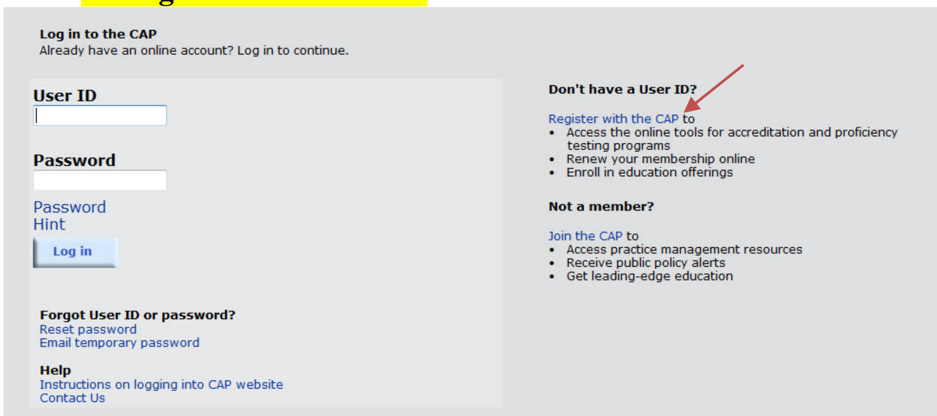
Site Administrator – person within the laboratory who is responsible for setting up and maintaining user privileges to view laboratory data on the CAP Web site.

5. PROCEDURE

A. General Information
   1. Each user must first create an account and login
      a. Go to www.cap.org

Form revised 3/31/00

b. Click on **HELLO, LOG IN** in upper right corner and then select **Log In** from drop down window
c. Click on **Register with the CAP**



d. Registration page opens, enter personal data and choose user ID/password
e. Provide answers to security questions, including email address
   - Email may be personal or business, it may **not** be a business email for another facility
   - The supervisor's business email may be used
f. Provide business or home address
g. CAP will notify you, by email, once your account has been activated. Proceed to step #2.

2. Request access
   a. Log onto the CAP website, http://www.cap.org/, using your new user ID/ password.
   b. Locate the section for **e-*LAB* solutions**, along the left sidebar of the web page. You may need to select e-Lab Solutions Suite from drop down menu after logging in.
   c. Select the link for "**Proficiency Testing / Quality Management**"
   d. Locate the yellow section on the page for "Using e-*LAB* Solutions"
   e. Click on **Request Access to Laboratory Data**. (If you manage multiple sites, you must request access to each site.)
   f. Enter the 7 digit CAP number for the site, then click **submit**
      - WAH – 7185324
      - SGAH –7185322
      - GEC – 7196153
   g. On the confirmation screen, review information and click **submit**
   h. The laboratory's site administrator will be notified of your request, and will assign your rights based upon your job category (technologist, Group Lead, supervisor, or manager)
   i. You will receive an email when access has been granted

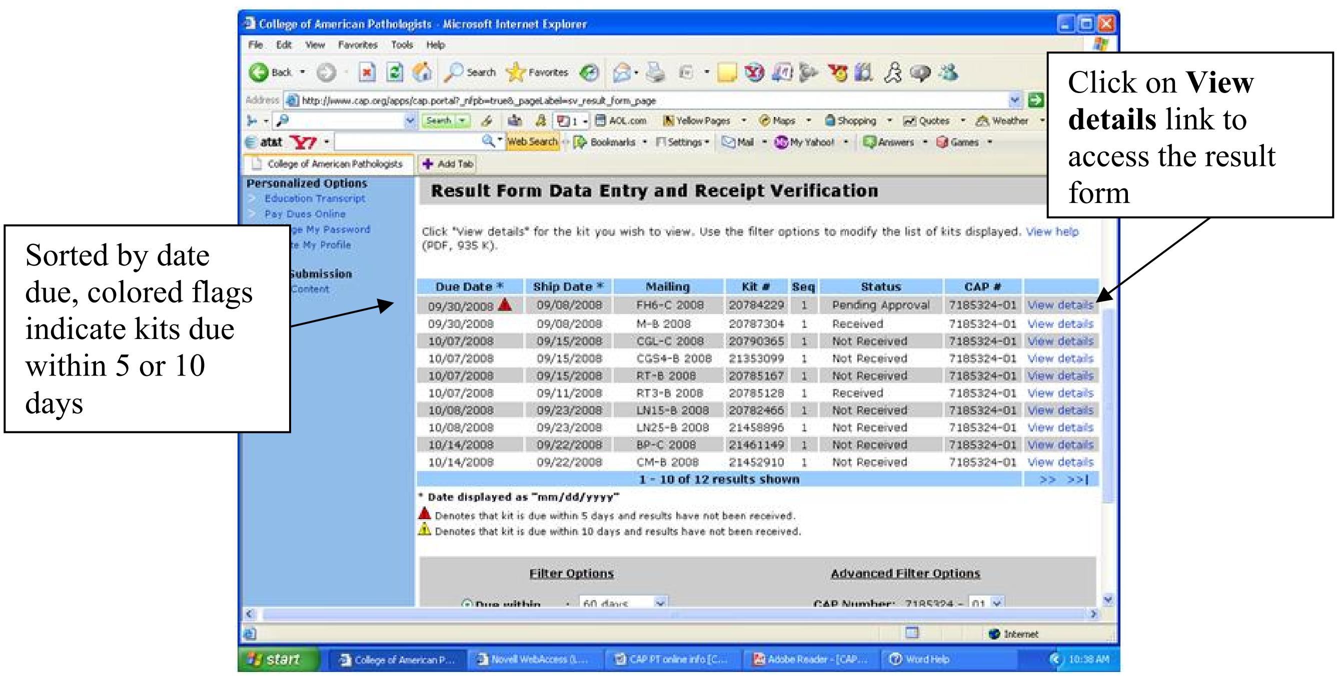
3. Granting access
   a. The Quality Assurance (QA) team receives email notification of access requests. Subject line of email will state 'Request Access to Lab xxxxxxx'
   b. The body of email includes the requestor's name and email, and the facility. If access for multiple sites was requested, separate emails are sent for each.

c. QA personnel will grant the appropriate access. The email is forwarded to the QA team stating access has been completed.

4. With access to a single laboratory, your log on will default into your laboratory.

5. Privileges to multiple laboratories will require a special step to ensure that you are working with the intended laboratory.
   a. Once you log onto the CAP site, select "Proficiency Testing /Quality Management" under **e-*LAB* solutions** (see above, steps 2.b and c).
   b. Click on the link for **Select or Change Laboratory** (dark blue bar). All laboratories for which you have privileges will appear on the screen with radio buttons to the left of the laboratory name.
   c. Choose only the laboratory that corresponds to your physical location at the time of selection.
   d. Press the gray button at the bottom of the page [Select Lab]. The line for the selected laboratory will back light in pale blue.

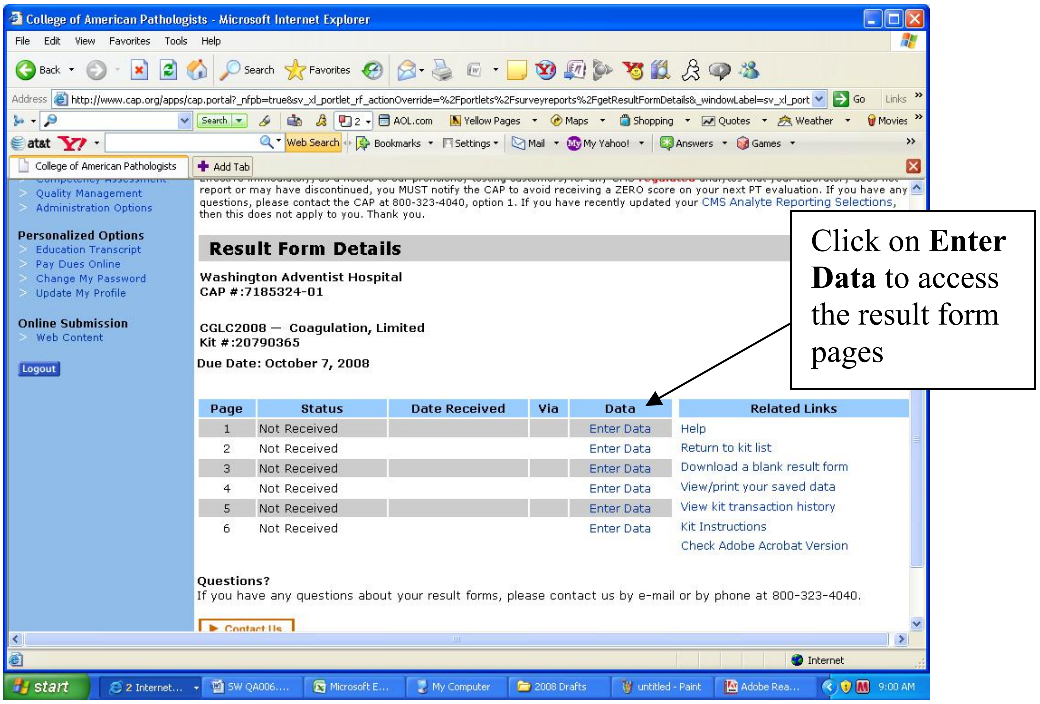
B. Navigating to PT Result Forms – Data Entry
1. Accessing Kits and Forms
   a. Log in
   b. Under **e-*LAB* solutions,** along the left side bar of the page, select the link for Proficiency Testing / Quality Management
   c. Locate the gray section, titled **"My Laboratory"**
   d. Select the link for *Result Forms*
   e. A list of outstanding and received PT kits will display in order by Due Date.



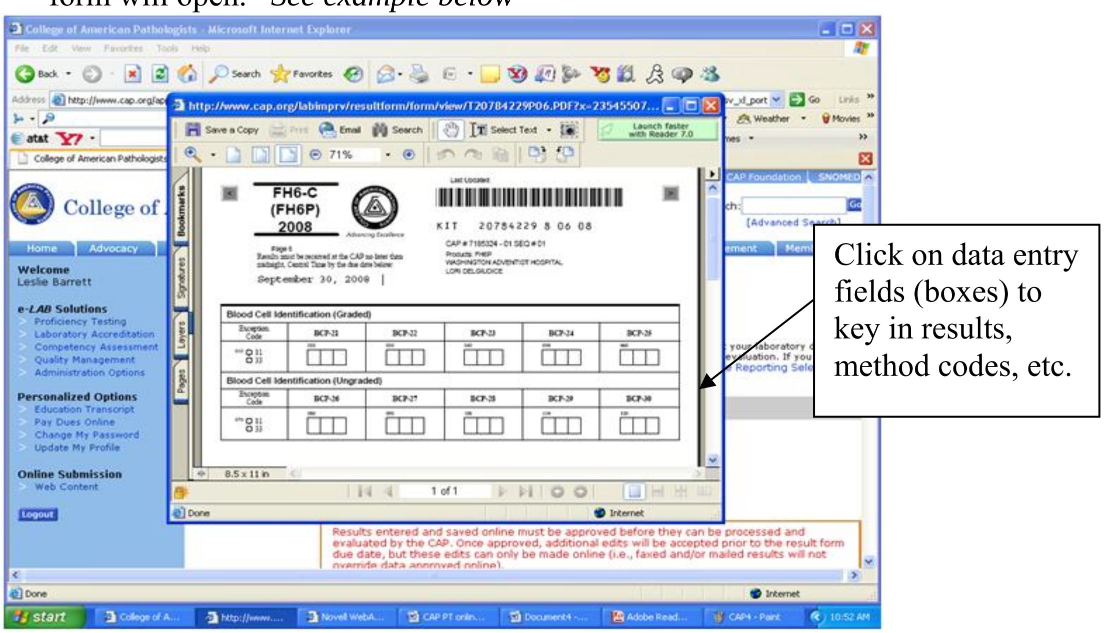
   f. Click on **View Details** that corresponds to the row for the PT kit that you need to enter.

Form revised 3/31/00

g. A list of each individual result page that shipped with the kit will build on the screen, with its status and receipt information. The 'data' column displays the options for each page, enter/view data.

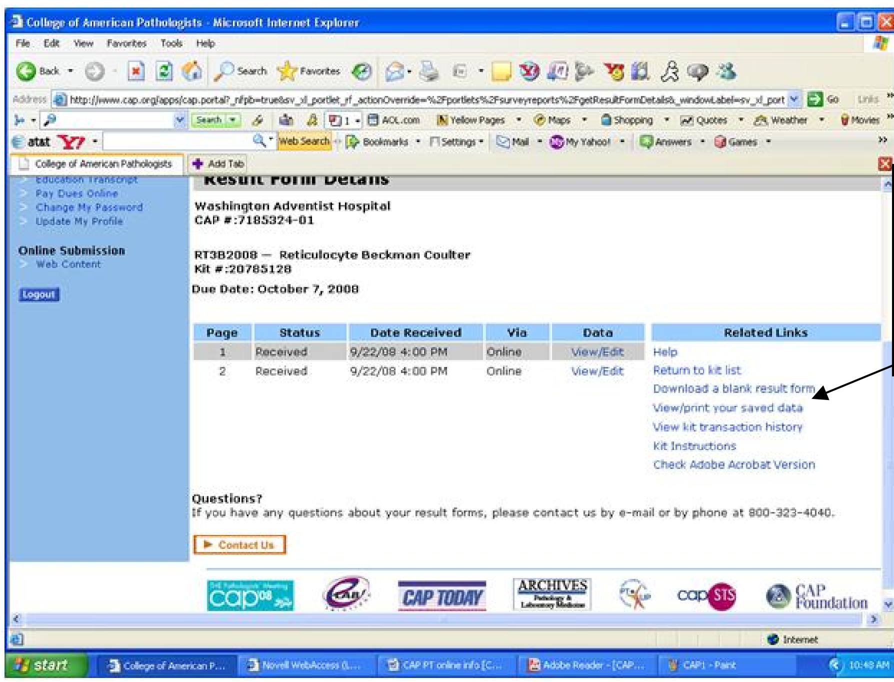


2. Entering Test Data
   a. Perform testing according to applicable technical procedure and QA procedure Proficiency Test Handling and Result Submission.
   b. Transfer results from worksheet or instrument printouts to online – see section 1 above to access kit and forms.
   As you select **Enter Data** for each page, a document identical to the printed form will open. *See example below*



   c. Key data into each applicable field.

d. Save each page using the 'SAVE' button at bottom of each page.
e. NOTE: **Select and save each page, even if there is no data to enter**
f. On the Attestation page, type in name(s) of technologist(s) who performed testing.
g. To enter or verify methods and instruments –
   1) Place cursor in Instrument Code field and a drop-down box will open to provide an alphabetical list of valid instruments and codes.
   2) Only codes from this list can be used.
   3) If your instrument or method is not listed, enter 010 in the corresponding boxes and save. On the last page, under 'Use of Other' type in name of instrument or method.
h. NOTE: Once data has been entered for a particular page, the 'status' column will update to Received and 'data' column will update to View/Edit.
i. On 'Related Link' list pick **View/print your saved data** – print and compare the submitted results to the worksheets or instrument printouts, verify no clerical errors. If errors detected, correct online and reprint applicable page(s).
j. Initial each page.



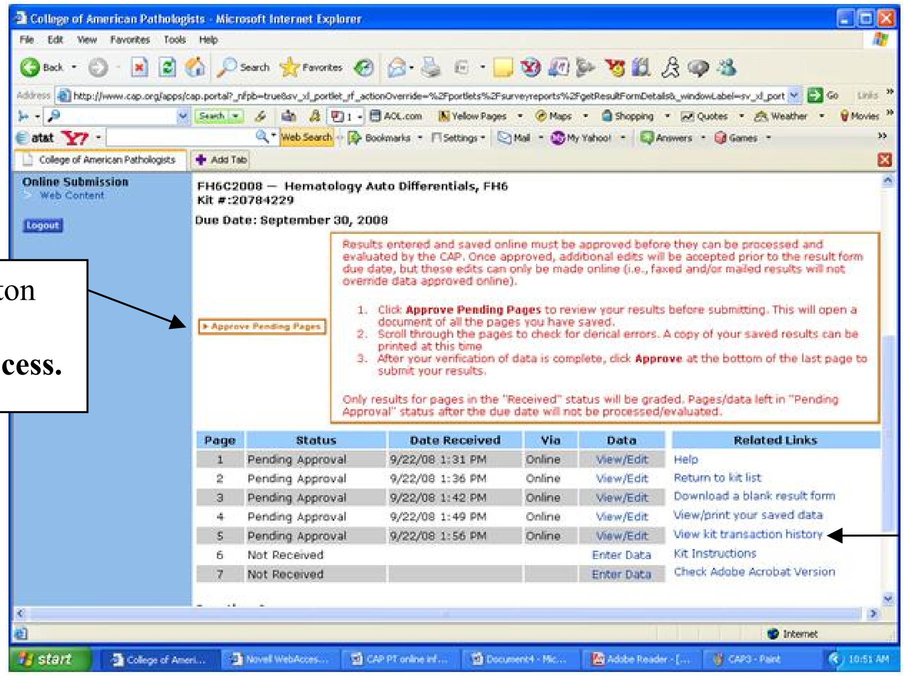
Click on **View/print your saved data** to print forms

k. Submit all paperwork (electronic documents, manual worksheets, instrument printouts, etc.) to the supervisor.

3. Approve data
   a. Supervisor performs routine review process per QA procedure Proficiency Test Handling and Result Submission
   b. Data can be edited as outlined in step 2 as needed.
   c. Supervisor logs onto e-*LAB* solutions and selects appropriate kit, then selects **Approve Pending Pages**

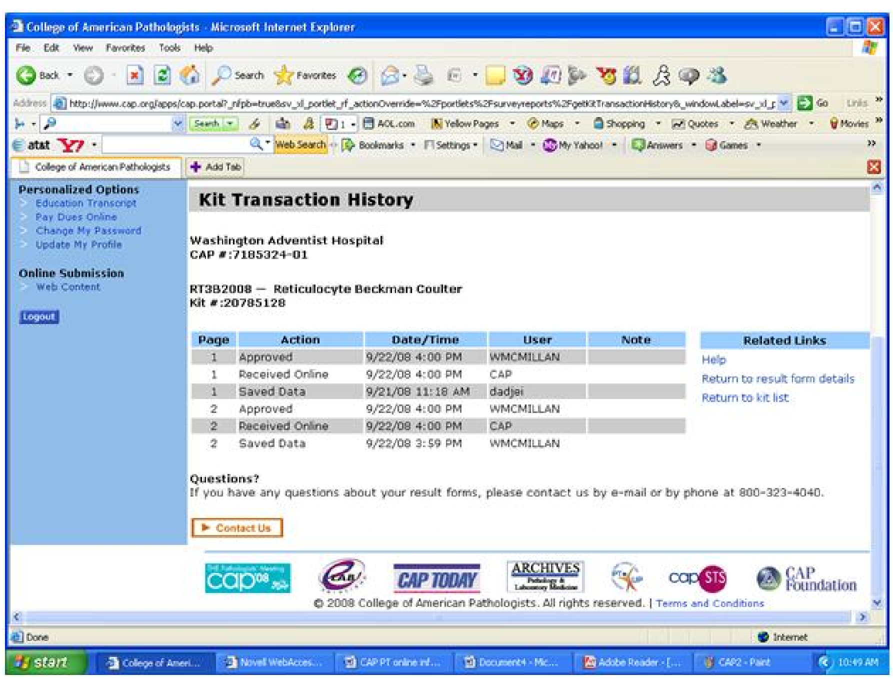
Form revised 3/31/00

Click this button to complete **approval process.**



For transaction history - click this link

d. Scroll through the forms, paying attention to methodology number codes and units of measure for each reported assay.
e. Verify that ALL pages, even those with no data, have 'Pending Approval' status and are reviewed. For any page that does NOT have the appropriate status, select **Enter Data** and **SAVE**, to change the status.
f. Click **Approve** on last page
g. Print the Kit Transaction History to document submission
   - On kit summary page, select View Kit Transaction History. Example shown below
   - Print this page and retain with all survey paperwork.



Form revised 3/31/00

4. View data
   a. Log in, select **e-*LAB* solutions**, select Proficiency Testing / Quality Management, "select or change lab" (as needed), select **Result Forms** (under **My Laboratory** section)
   b. Click **View details** for the appropriate kit (see screen shot under B.1)
   c. Click on link for View/Edit or View in the 'data' column (option depends on individual user's access)
   d. These pages will show until the kit's due date. The link will open a PDF version of the result form.

6. RELATED DOCUMENTS

Proficiency Test Handling and Result Submission, QA procedure

7. REFERENCES

College of American Pathologists, User Guide, Using e-*LAB* Solutions

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP QA006.000		
000	5/6/2013	Section 5: A.1 added email address specifications A.3 added B.3 added verification of page status to ensure all are reviewed and submitted	L Barrett	C Bowman
001	5/26/2015	Section 5: A.1 registration / log in instruction and screen shot updated Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13	L Barrett	C Bowman

9. ADDENDA AND APPENDICES

Frequently Asked Questions About Using e-*LAB* Solutions

Form revised 3/31/00

Frequently Asked Questions About Using e-*LAB* Solutions

Where can I find information on how to use e-*LAB* Solutions?
On the home page, look for the e-*LAB* Solutions logo at the bottom of the page. Click on "Learn more about e-*LAB* Solutions," then click on "Users Guide" to access the PDF document. You may print or save the document. Click on "What can e-*LAB* Solutions do for you?" to view an online presentation.

What do I have to do to use e-*LAB* Solutions?
Access to e-*LAB* Solutions is initiated by a three-step process.
First, your site administrator (designated as the laboratory director) must opt in to create a laboratory account. Each lab was sent a one-time PIN to activate (opt in) the lab's online account. If you do not have your PIN, call the CAP Customer Contact Center at 800-323-4040 option 1.
Second, each user must create a personal Web account. There is a 24-hour turnaround time for creating personal accounts.
Third, each user must request access to the laboratory's account. An e-mail message will be sent to your site administrator once you have requested access. He or she will then approve you to use the system and assign permissions.

What is the difference between Create an Account and Request Access?
"Create an Account" will set up an individual user account. An individual user account allows you to log in to the CAP Web site and be recognized. "Request Access" triggers an e-mail to your site administrator that you would like to have access to your laboratory's data.

Where do I go to enter my PT results?
Log in to your Web account at www.cap.org, then click on "e-*LAB* Solutions" in the Personalized Options list. Under Surveys/EXCEL, click on "Result Forms." Select the kit for which you wish to enter data, click on "View Details," and then click "Enter Data."

Why can't I find my kit online?
All products are grouped to match the organization of the CAP Surveys catalog, and will be found under the same categories as the tabs in the catalog. If you are entering anatomic pathology results, click on "Result Forms" under "Anatomic Pathology Education Programs." If you are entering results for Q-TRACKS and Q-PROBES, select "Result Forms" under "Q-PROBES" or "Q-TRACKS."
The default view of PT kits includes kits shipped to your laboratory in the last 60 days. If the kit you seek was shipped more than 60 days ago, use the filter criteria at the bottom of the list page to display earlier shipments.

How do I submit my results online?
This is a two-step process: "Enter/Save Data" and "Approve Pending Pages."
When you are entering data, the system asks you to save your pages. This captures the information, but does not send it to the CAP. Only those individuals with approval rights have an "Approve Pending Pages" option displayed after the results have been entered and saved. This allows a laboratory, if it chooses, to have another level of validation before the data is sent to the CAP for evaluation.

What happens if I forget to approve the data?
If for any reason we do not have your data for a particular Survey prior to our anticipated evaluation period, we will notify your site administrator(s) via e-mail. You will have at least one day to submit your data.

Form revised 3/31/00

The status of my kit reads pending approval, but I already approved it. What should I do?
In order to approve pending pages you must click on "Approve Pending Pages," scroll through your test result form, and click the "Approve" button on the last page.

How do I handle the attestation page online?
The attestation page has been made available for you to print and have your medical director sign. You should keep it on file with your proficiency testing records.

How do I know that the CAP has received my data?
Once you have approved your data online or submitted your data by fax or mail, you can log in to your Web account and confirm that the CAP has received your data.
Once you are logged in, click on "Result Forms," look for the kit you are interested in and check under the status column. "Received" means that the CAP has received data. Click on "View Details" to ensure that the CAP has received all of your pages.

How do I access my Surveys or EXCEL evaluation online?
Once you are logged in to your Web account, click on "e-*LAB* Solutions" in the Personalized Options list then "Evaluations and Reports" under "Surveys/EXCEL Proficiency Testing." Select the kit you are interested in and then select the evaluation report you want to view. The following reports are available from the drop down menu under Available Reports: Interactive Evaluation, Printed Evaluation and Participant Summary Report.