

TRAINING UPDATE

Lab Location:

GEC, SGMC & WAH

Date Distributed:

4/8/2016

Department:

Technical Mgmt & QA

Due Date:

4/20/2016

Implementation:

4/20/2016

DESCRIPTION OF PROCEDURE

Name of procedure:

**CAP Activity Menu Changes/Updates
GEC.QA241, SGAH.QA929, WAH.QA920 v0**

Description:

New SOP to define process for review and update of
CAP activity menu

[This SOP will be implemented on April 20, 2016](#)

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

Approved draft for training (version 0)

Non-Technical SOP

Title	CAP Activity Menu Changes/Updates	
Prepared by	Cynthia Bowman-Gholston	Date: 3/17/2016
Owner	Cynthia Bowman-Gholston	Date: 3/17/2016

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

Review:		
Print Name	Signature	Date

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1. PURPOSE

This procedure will establish the process for the ongoing maintenance of the CAP (College of American Pathologist) Activity Menu:

- Provide the steps for electronic update of information via e-lab solutions.
- Provide the steps for manual paper update of the information.

2. SCOPE

This procedure applies to all QA team members, supervisory, or management personnel who may need to update or revise the test activity list.

3. RESPONSIBILITY

- The Supervisory/Management team performs the test review and submits any changes to the QA team for processing.
- The QA team ensures the update of the annual update of activity menus by:
 - Circulating the current menu with the annual proficiency test review.
 - Updating the activity menu and saving a copy on the shared drive.

4. DEFINITIONS

CAP: College of American Pathologists, the laboratory accrediting agency

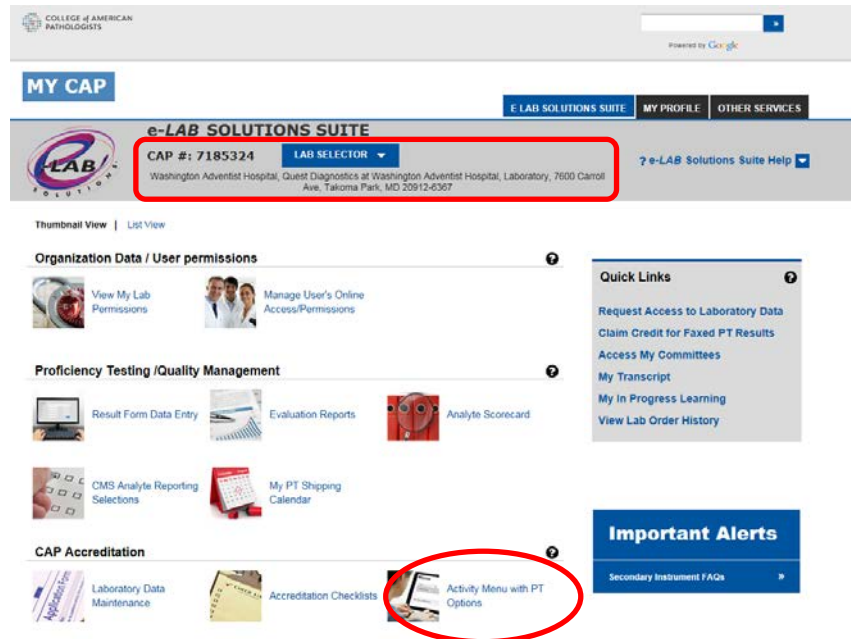
PT: Proficiency Test – A standardized testing program that distributes unknown samples to laboratories and uses the peer group performance to grade each laboratory’s accuracy by the specified allowable error for each test or peer group limitations.

QM: Quality Management – Processes that track and monitor laboratory quality.

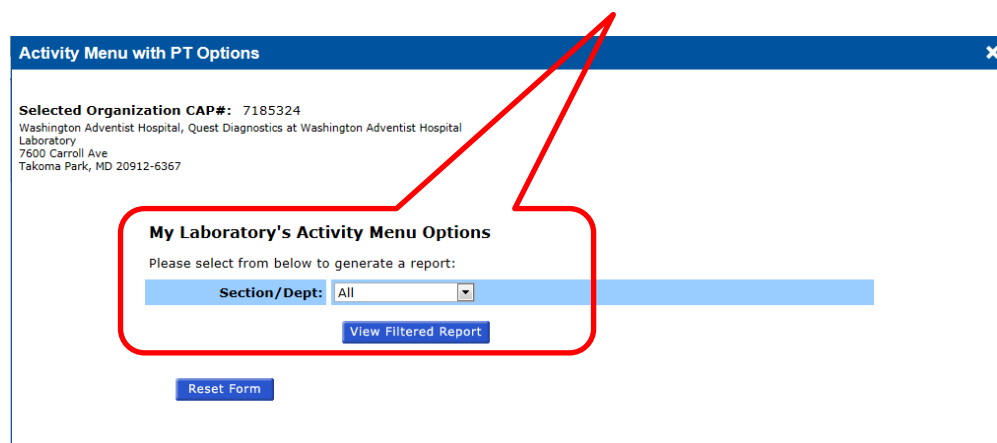
5. PROCEDURE

A. Pulling the current Activity Menu from the CAP website:

- Sign onto the CAP website, with your user name and password
- Use the down arrow to the right of your name and select the dropdown menu for E-Lab Solutions Suite
- Look to the center of this webpage and locate the CAP identification number.
- Use the dropdown arrow on the right of this field and select the appropriate laboratory. The name of that laboratory will appear on the screen.



- Select the icon for Activity Menu with PT Options, located within the CAP Accreditation section of the page.
- A selection screen opens and defaults to all sections / departments (use the drop to filter the report as appropriate). Select the blue button to View Filtered Report.



A PDF of the Activity Menu appears on the screen:

Contents First Prev Next Last Goto Page 1 of 10 100% **Excel Export** PDF Export Print

COLLEGE of AMERICAN PATHOLOGISTS
 225 Washington Road, Northfield, Illinois 60093-2760
 800-323-4040 • cap.org

Laboratory Accreditation Program
 Laboratory Activity Menu
 SU: ALL

Page 1 of 10
 03/16/2016 10:17 AM

CAP Number: 7185324
 Laboratory: Washington Adventist Hospital Quest Diagnostics at
 City/State/Province: Takoma Park, MD

[Checklist Selection Report](#)
[Master Activity Menu](#)
[Missing PT Enrollment Report](#)
[PT Enrollment Guide](#)
[Test Menu Change Form](#)

Department /Section: Blood Bank-AABB

Subdiscipline	Test/Activity	Test / Activity ID	PT Required	Alternative Assessment Required	Scope of Service/Analytic Method	2016 Missing PT Enrollment
All Common	Common (CAP Office use)	4334			Y	
Immunohematology	ABO blood grouping	2946	Y			
Immunohematology	Antibody elutions	3361		Y		
Immunohematology	Antibody identification	2924	Y			
Immunohematology	Antibody screen	2947	Y			
Immunohematology	Automated blood banking test system	2912			Y	
Immunohematology	Compatibility testing	2932	Y			
Immunohematology	Direct antiglobulin test (DAT), non-automated	2952	Y			
Immunohematology	Donor unit retyping	2914			Y	
Immunohematology	RBC antigen typing	2944		Y		
Immunohematology	Rh type (includes weak D)	2955	Y			
Immunohematology	Sickle cell screening on donor units	2922		Y		
Immunohematology	Solid phase techniques	2920			Y	
Transfusion Services	Blood/component issuance for transfusion	2925			Y	
Transfusion Services	Blood/component processing (pool, thaw, aliquot)	2919			Y	
Transfusion Services	Blood/component storage	2926			Y	
Transfusion Services	Blood/component transfusion in this facility	4993			Y	

For activities requiring alternative assessment, laboratories can use PT provided by the CAP or other providers.
 NOTE: Activities noted as Scope of Service / Analytical Method do not require PT or alternative assessment.

College of American Pathologists LAMT_LAMS

- Select the option to EXCEL Export the file:
- Follow the instruction shown on the screen and the EXCEL Activity Menu opens on the screen:

	A	B	C	D
1	Section Name	Subdiscipline	Activity Name	Activity ID P
2	Blood Bank-AABB	All Common	Common (CAP Office use)	4334
3	Blood Bank-AABB	Immunohematology	ABO blood grouping	2946 Y
4	Blood Bank-AABB	Immunohematology	Antibody elutions	3361
5	Blood Bank-AABB	Immunohematology	Antibody identification	2924 Y
6	Blood Bank-AABB	Immunohematology	Antibody screen	2947 Y
7	Blood Bank-AABB	Immunohematology	Automated blood banking test system	2912
8	Blood Bank-AABB	Immunohematology	Compatibility testing	2932 Y
9	Blood Bank-AABB	Immunohematology	Direct antiglobulin test (DAT), non-automated	2952 Y
10	Blood Bank-AABB	Immunohematology	Donor unit retyping	2914
11	Blood Bank-AABB	Immunohematology	RBC antigen typing	2944
12	Blood Bank-AABB	Immunohematology	Rh type (includes weak D)	2955 Y

- Save this file on the G drive within the G:\AHC_Lab\Quality Assurance\Proficiency Testing\CAP current year\Activity Menus.
- Name the EXCEL file using the CAP number and date.
- Customize the margins to 0.2” on each side and all columns on same page. (If the view is too small to read, hide any columns that are not essential to the test name and activity menu code prior to printing the file.)

Form revised 3/31/00

B. Printing the Manual Activity Menu Change Form from the CAP website:
Return to the PDF view of the Activity Menu:

Contents First Prev Next Last Goto Page 1 of 10 100% Excel Export PDF Export Print

COLLEGE of AMERICAN PATHOLOGISTS
225 Washington Road, Northville, MI 48168-1000
800-323-4040 • www.cap.org

Laboratory Accreditation Program
Laboratory Activity Menu
SU: ALL

Page 1 of 10
03/16/2016 10:17 AM

CAP Number: 7185324
Laboratory: Washington Adventist Hospital Quest Diagnostics at
City/State/Province: Takoma Park, MD

Checklist Selection Report
Master Activity Menu
Missing PT Enrollment Report
Test Menu Change Form


Department /Section: Blood Bank-AABB

Subdiscipline	Test/Activity	Test/Activity ID	PT Required	Alternative Assessment Required	Scope of Service / Analytical Method	2016 Missing PT Enrollment
All Common	Common (CAP Office use)	4334			Y	
Immunohematology	ABO blood grouping	2946	Y			
Immunohematology	Antibody elutions	3361		Y		
Immunohematology	Antibody identification	2924	Y			
Immunohematology	Antibody screen	2947	Y			
Immunohematology	Automated blood banking test system	2912			Y	
Immunohematology	Compatibility testing	2932	Y			
Immunohematology	Direct antiglobulin test (DAT), non-automated	2952	Y			
Immunohematology	Donor unit retyping	2914			Y	
Immunohematology	RBC antigen typing	2944		Y		
Immunohematology	Rh type (includes weak D)	2955	Y			
Immunohematology	Sickle cell screening on donor units	2922		Y		
Immunohematology	Solid phase techniques	2920			Y	
Transfusion Services	Blood component issuance for transfusion	2925			Y	
Transfusion Services	Blood component processing (pool, thaw, aliquot)	2919			Y	
Transfusion Services	Blood component storage	2926			Y	
Transfusion Services	Blood component transfusion in this facility	4363			Y	

For activities requiring alternative assessment, laboratories can use PT provided by the CAP or other providers.
NOTE: Activities noted as Scope of Service / Analytical Method do not require PT or alternative assessment.

College of American Pathologists
LAMT_LAMS

Select the link labeled Test Menu Change Form from the upper right of the PDF screen:
The blank Activity Menu Change form will appear on the screen:

 **cap**

**Accreditation Program
Test/Activity Menu Change Form**

Step 1: CAP Number and AU ID Number (Required)

CAP #

AU ID #

Laboratory Name

City State

Important Notes for CAP PT Customers

- Do not use this form to order, cancel, or make changes to method codes for proficiency testing (PT) Surveys.
- Changes to your laboratory's Activity Menu will not result in changes to your CMS regulatory reporting selection for PT. A current CMS Analyte Reporting Selection report can be viewed through e-LAB Solutions.
- For more information call Customer Contact Center at 1-800-323-4040, option 1.

Step 2: Instructions


- To add a test/activity: refer to the CAP Master Activity Menu to determine test/activity code(s). If unable to find an appropriate code just submit a description in the Test/Activity field and a code will be assigned.
- To delete a test/activity: refer to your laboratory's Activity Menu with PT Options or Laboratory Data Report (both available through e-LAB Solutions) to determine the appropriate code(s) to delete.
- Indicate the Section Unit/Department affected by the addition/deletion.
- Submit test menu changes by one of these methods:
 - Preferred method of modifying your laboratory's Activity Menu is online through e-LAB Solutions (Laboratory Accreditation).
 - Email completed form to testmenu@cap.org. The form is available as a fillable pdf through e-LAB Solutions.
 - Fax completed form to 847-832-8171.

Add/Delete	Test/Activity Name	Activity Code	Section Unit/Department
<input checked="" type="radio"/> Add <input type="radio"/> Delete	Iron EXAMPLE	1 5 2 7	Core Lab EXAMPLE
<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
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<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
<input type="radio"/> Add <input type="radio"/> Delete		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Step 3: Authorization Information

Print Name Phone/Ext.

Email Date:

1515  41546

- Print the Test/Activity Menu Change Form and attach it to the printed copy of the Test/Activity Menu.
- Give the materials to the section supervisor or manager for review.

Form revised 3/31/00

C. Supervisor/Manager Process:

- Review the Activity Test Menu against the laboratory reported tests.
- Identify any missing or extra tests on the activity menu.
- Document changes by adding the test name and code on the printed Test/Activity Menu Change Form
- Return the updated Test/Activity Menu Change Form to the QA team for processing.

D. QA Specialist Process:

Manual submission of changes

- Review Test Menu Change form for any additions or deletions.
- If no adjustments are indicated; no changes will be made. Scan the entire Test Menu and the menu change form into a file labeled by the CAP ID number and save the document into the current year CAP folder/Activity Menus. Saving the file indicates the date reviewed.
- If changes are needed, the QA specialist will locate the CAP identification number for the test, update the form with the number, fill out the bottom of the form, and fax it to the fax number printed on the form.
 - Attach a copy of the menu change form and the fax confirmation along with the other activity menu sheets and save the document into the current year CAP folder/Activity Menus. Saving the file indicates the date reviewed.

Electronic Submission of Changes

- CAP allows electronic submission of changes. The process is easy, but lengthy and limited to only users with Accreditation privileges. See Addendum A for details.

6. RELATED DOCUMENTS

N/A

7. REFERENCES

N/A

8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By

9. ADDENDA AND APPENDICES

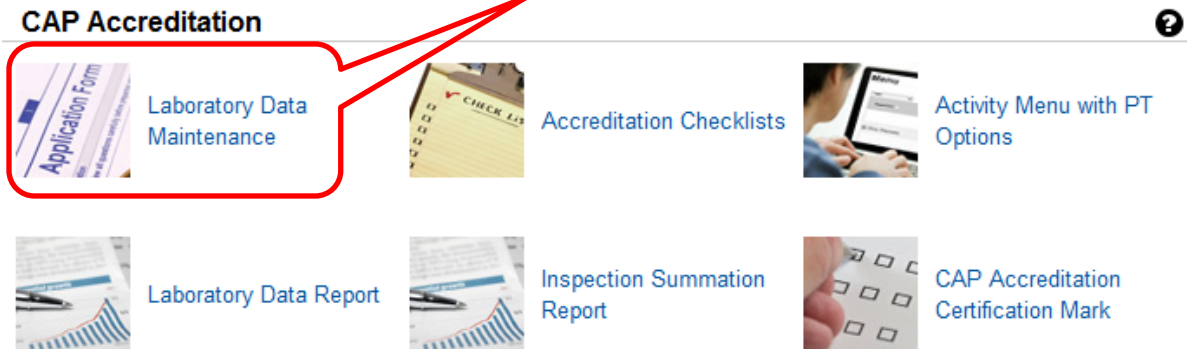
Maintaining Accreditation Information via CAP Website

Form revised 3/31/00

Addenda A

Updating Activity Menu Changes via the CAP Accreditation Module

1. Log onto the CAP Website and access E-Lab Solutions. If you have access to multiple sites, select the CAP number that corresponds to the appropriate site.
2. Select the Laboratory Data Maintenance Link



3. The Accreditation Window opens. Select the tab “Laboratory Section Information.” Choose the appropriate lab section.
4. Along the left side of the screen, select the button for Activities. Notice that the link attached to the My Section Unit Activities indicates “Remove Existing Activity” and the link above the Newly Added Activities offers the option “View CAP Master Activity Menu to Add (or remove) New Activities”

COLLEGE of AMERICAN PATHOLOGISTS

Welcome cbg130

Selected Organization AU ID: 1406322
 Selected Organization CAP#: 7185324
 Washington Adventist Hospital, Quest Diagnostics at Washington Adventist Hospital
 Laboratory
 7600 Carroll Ave
 Takoma Park, MD 20912-6367

Exit

When making any updates, you must also click the "Submit to CAP" button under the Finish/Submit tab. Only then will your data be submitted to CAP.

Contact the CAP

Home
Laboratory Data/Director Information
Laboratory Section Information
Personnel Forms
Attachments
Finish/Submit

Section Maintenance (Core Laboratory - 1406451)

Items listed below in Red have missing or invalid data.

"*" indicates required data "!" indicates modified data

- Review the activities listed in "My Section Unit/Department Activities"
- To remove activities click the "Remove Existing Activity" link
- To add additional activities, click the "View CAP Master Activity Menu to Add (or remove) New Activities" link

NOTE: Changes to the laboratory's Activity Menu will not result in changes to your CMS regulatory reporting selections for proficiency testing. For CAP proficiency testing participants, a current CMS Analyte Reporting Selections report can be viewed online or obtained by calling 800-323-4040.

* At least one activity must be selected.

Demographics

Activities

Test Sites

Section Address

My Section Unit/Department Activities
Remove Existing Activity

ID	Name	Subdiscipline	Category
! 1643	Gentamicin, serum	Special Chemistry	Reportable Assays - Basic List
! 1590	Myoglobin, serum/plasma	Chemistry	Reportable Assays - Basic List
! 1651	Phenobarbital	Special Chemistry	Reportable Assays - Basic List
! 1670	Tobramycin, serum	Special Chemistry	Reportable Assays - Basic List

Newly Added Activities
View CAP Master Activity Menu to Add (or remove) New Activities

ID	Name	Subdiscipline	Category

Could not find the test on the CAP Master Activity Menu?
Add/Remove Miscellaneous Activity

Name	Subdiscipline (Discipline)

5. Selecting either add or remove will open a second page, one page with a search field, for adding tests or a page of existing tests to select tests for removal. Add or remove tests as necessary and press the Confirm Selection button at the bottom left of the active web page. This will dissolve into the original activity page. You must select the Save and Close button at the bottom left of this page

Selected Organization AU ID: 1406322
Selected Organization CAP#: 7185324
Washington Adventist Hospital, Quest Diagnostics at Washington Adventist Hospital
Laboratory
7600 Carroll Ave
Takoma Park, MD 20912-6367

Welcome cbg130

When making any updates, you must also click the "Submit to CAP" button under the Finish/Submit tab. Only then will your data be submitted to CAP.

Home Laboratory Data/Director Information Laboratory Section Information Personnel Forms Attachments Finish/Submit

Section Maintenance (Cap Laboratory - 086451)

My Section Unit/Department Activities Use the fields under "Search Criteria" to filter the list of activities. Help

Search Criteria
Disciplines: All Subdisciplines: All
Category: Show All Scope of Service/Method Only Activity Name: Search

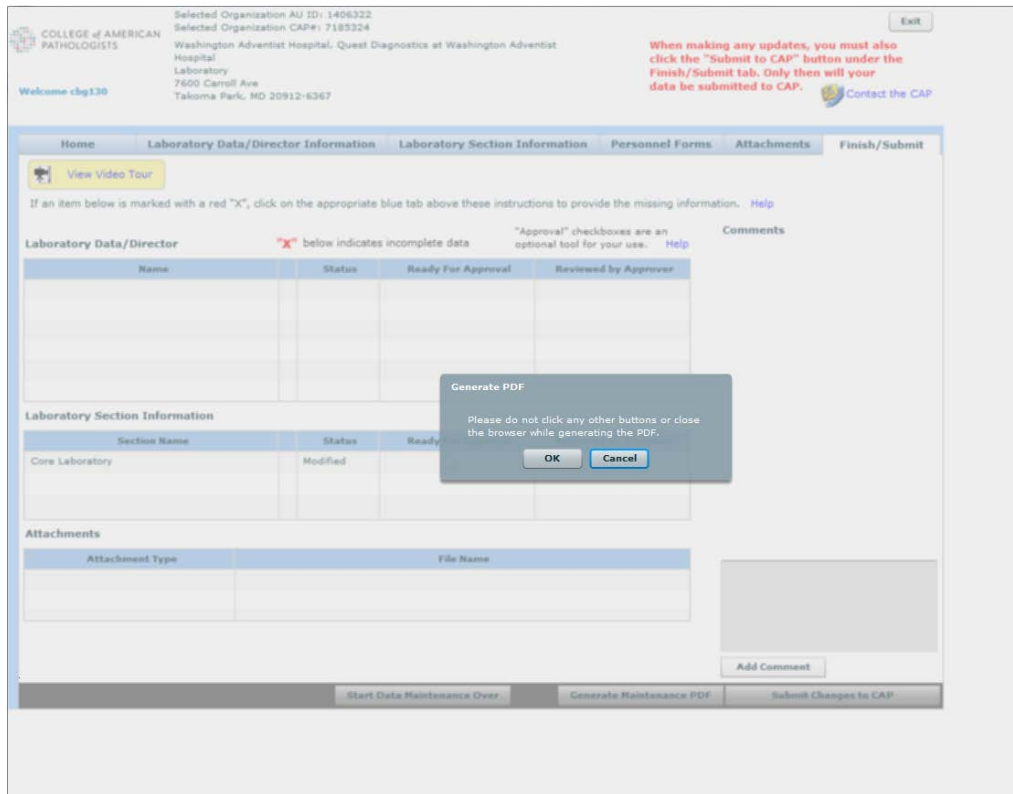
Remove	ID	Name	Subdiscipline	Category
<input checked="" type="checkbox"/>	1643	Gentamicin, serum	Special Chemistry	Reportable Assays - Basic List
<input checked="" type="checkbox"/>	1590	Myoglobin, serum/plasma	Chemistry	Reportable Assays - Basic List
<input checked="" type="checkbox"/>	1651	Phenobarbital	Special Chemistry	Reportable Assays - Basic List
<input checked="" type="checkbox"/>	1670	Tobramycin, serum	Special Chemistry	Reportable Assays - Basic List
<input type="checkbox"/>	4334	Common (CAP Office use)	All Common	Scope of Service/Analytic Method
<input type="checkbox"/>	1827	Enzyme immunoassay	Toxicology	Scope of Service/Analytic Method
<input type="checkbox"/>	1018	Plating cultures only (set-up)	Bacteriology	Scope of Service/Analytic Method
<input type="checkbox"/>	1798	Therapeutic drug monitoring	Special Chemistry	Scope of Service/Analytic Method
<input type="checkbox"/>	374	Bacterial culture, screen for growth only	Bacteriology	Reportable Assays - Extended List
<input type="checkbox"/>	4092	Blood cultures	Bacteriology	Reportable Assays - Extended List

Confirm Selection

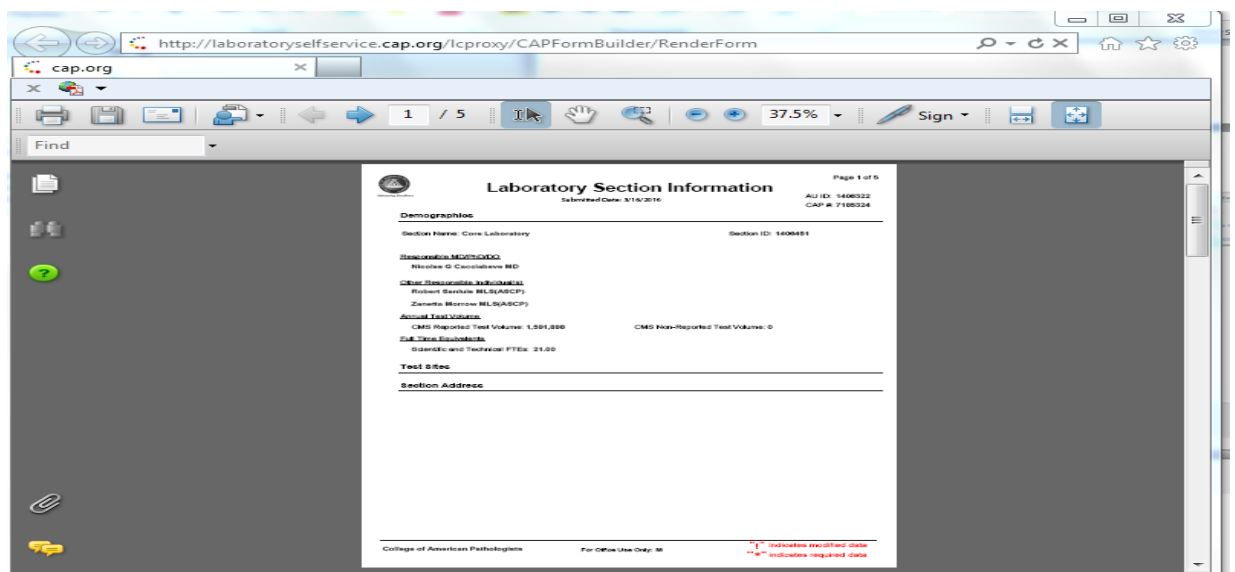
Could not find the test on the CAP Master Activity Menu? Add/Remove Miscellaneous Activity

Save And Close Close

- Once you have completed the work on this tab, select the tab for Finish/Submit. You will see a notice to generate a PDF of your information, select OK.

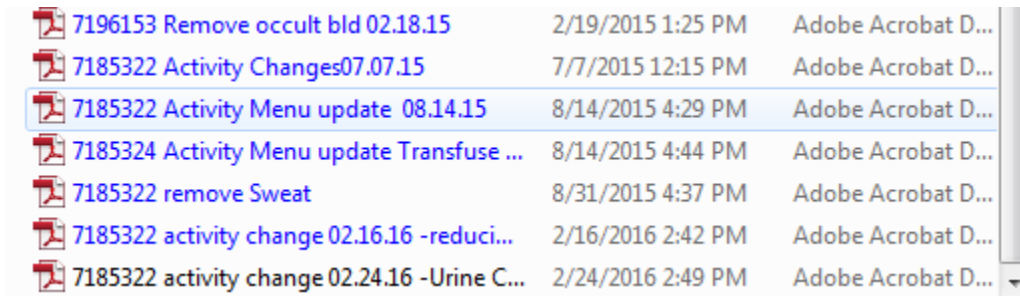


A PDF of the laboratory's current Section Accreditation Information, appears on the screen.



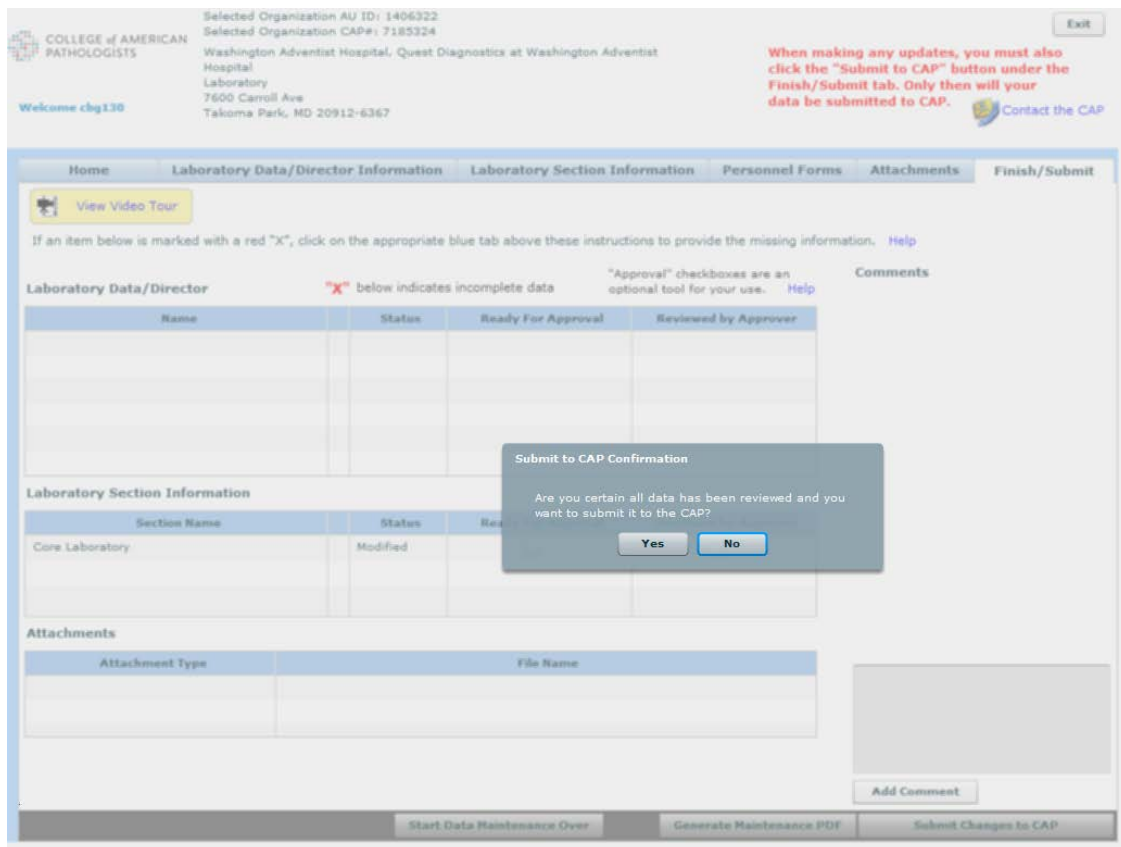
Form revised 3/31/00

7. Save this file on the G:\AHC_Lab\Quality Assurance\Regulatory Compliance\Accreditation\((site folder) SGAH (Site abbreviation) and date i.e.03.24.16



7196153 Remove occult bld 02.18.15	2/19/2015 1:25 PM	Adobe Acrobat D...
7185322 Activity Changes07.07.15	7/7/2015 12:15 PM	Adobe Acrobat D...
7185322 Activity Menu update 08.14.15	8/14/2015 4:29 PM	Adobe Acrobat D...
7185324 Activity Menu update Transfuse ...	8/14/2015 4:44 PM	Adobe Acrobat D...
7185322 remove Sweat	8/31/2015 4:37 PM	Adobe Acrobat D...
7185322 activity change 02.16.16 -reduci...	2/16/2016 2:42 PM	Adobe Acrobat D...
7185322 activity change 02.24.16 -Urine C...	2/24/2016 2:49 PM	Adobe Acrobat D...

8. After completion with the PDF file, the next screen asks you to 'Submit to CAP'. Respond YES.



Selected Organization AU ID: 1406322
Selected Organization CAP#: 7185324
Washington Adventist Hospital, Quest Diagnostics at Washington Adventist Hospital
Laboratory
7600 Carroll Ave.
Takoma Park, MD 20912-6367

When making any updates, you must also click the "Submit to CAP" button under the Finish/Submit tab. Only then will your data be submitted to CAP.

Home Laboratory Data/Director Information Laboratory Section Information Personnel Forms Attachments Finish/Submit

View Video Tour

If an item below is marked with a red "X", click on the appropriate blue tab above these instructions to provide the missing information. Help

Laboratory Data/Director "X" below indicates incomplete data "Approval" checkboxes are an optional tool for your use. Help

Name	Status	Ready For Approval	Reviewed by Approver

Laboratory Section Information

Section Name	Status	Ready
Core Laboratory	Modified	

Attachments

Attachment Type	File Name

Submit to CAP Confirmation

Are you certain all data has been reviewed and you want to submit it to the CAP?

Yes No

Add Comment

Start Data Maintenance Over Generate Maintenance PDF Submit Changes to CAP

9. The next screen confirms that the changes have been submitted to CAP

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Name	Status	Ready For Approval	Reviewed by Approver

Laboratory Section Information

Section Name	Status
Core Laboratory	Modified

Attachments

Attachment Type	File Name

Add Comment

Start Data Maintenance Over Generate Maintenance PDF Submit Changes to CAP

Submit to CAP Confirmation

You have submitted your data maintenance changes to the CAP. The information submitted must be processed by CAP before you will see the changes reflected online.

Exit

10. After three to four days, review the contents of the activity list to ensure that the changes have taken place.