TRAINING UPDATE

Lab Location:	GEC, SGMC & WAH	**Date Distributed:**	5/21/2019
Department:	Technical staff	**Due Date:**	6/21/2019
		Implementation:	**6/11/2019**

DESCRIPTION OF PROCEDURE REVISION

Name of procedure:
CAP Online Proficiency Testing   SGAH.QA26 v4
Description of change(s):
Section 5: updated CAP screen shots in part A; add online resulting via DI Section 9: removed Appendix since content was already within SOP   This revised SOP will be implemented on June 11, 2019

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

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

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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
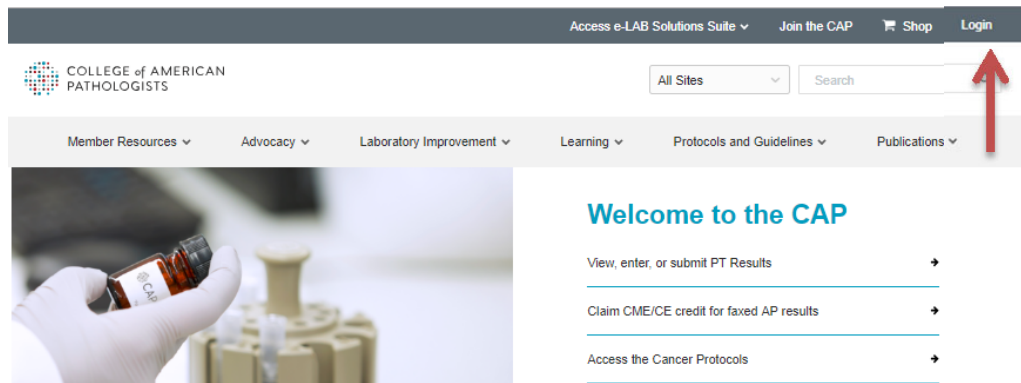
PT – proficiency testing

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.
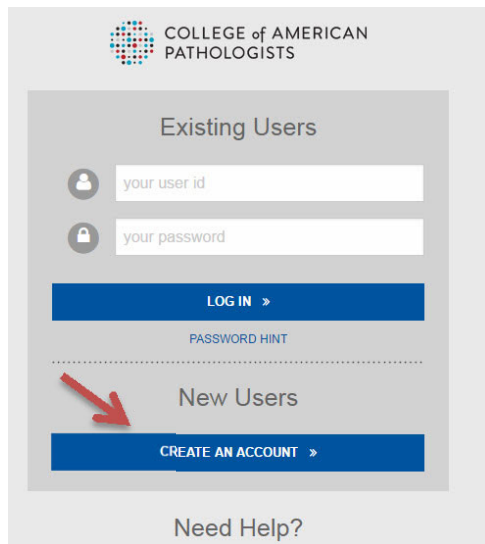
5.   PROCEDURE

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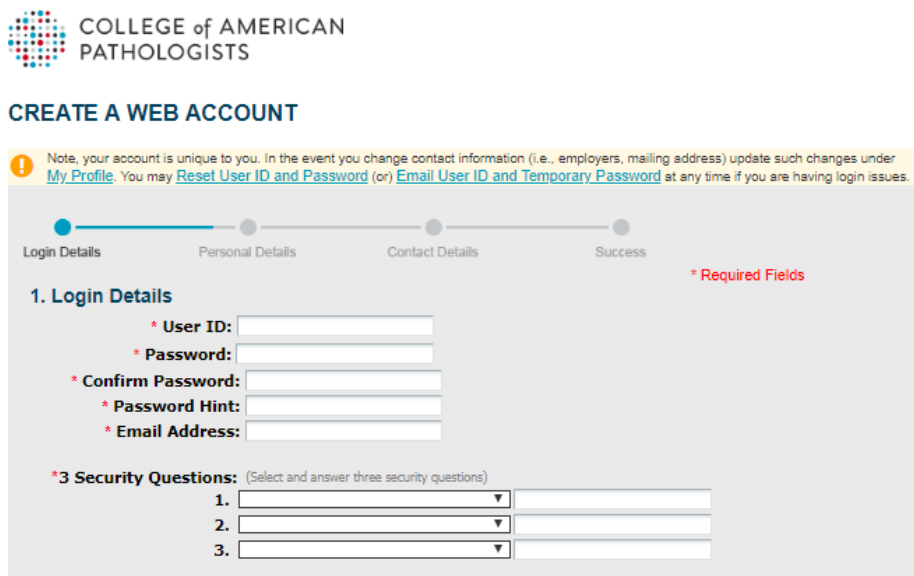   a. Go to www.cap.org

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b. Click on **LOG IN** in upper right corner

c. Click on **Create an account**

d. A page opens to 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. Note you can log directly into the **e-LAB Solutions Suite** by selecting that option from the upper bar.

    b. On the right side of the screen, under quick links, click on **Request Access to Laboratory Data**. (If you manage multiple sites, you must request access to each site.)

    c. Enter the 7 digit CAP number for the site, then click **submit**
- WAH – 7185324
- SGAH –7185322
- GEC – 7196153

    d. On the confirmation screen, review information and click **submit**

    e. 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)

    f. 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 only 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, go to the **e-LAB Solutions Suite**.

b.   The next screen contains a **Lab Selector** area in a bar near the top. Click the drop down arrow to the right to display all laboratories for which you have privileges.

c.   Choose the laboratory that corresponds to your physical location at the time of selection by clicking on the radio button on the left side.
d.   The dropdown list will disappear from the screen, leaving the e-LAB Solutions Menu for the selected lab.

B.   Navigating to PT Result Forms – Data Entry

1.   Accessing Kits and Forms once you've selected your lab:
   a.   The first page of the **Access e-LAB Solutions Suite** displays a main menu
   b.   Look in the Proficiency Testing/Quality Management category and select the link for Result Form Data Entry.
   c.   The next page displays the list of outstanding and received PT kits in order by Due Date.

RESULT FORM DATA ENTRY   ← Back to e-LAB Solutions Main

> Click here for filter option(s) to modify the list of kits displayed or search for other kits.

Applied Filters: Due within 75 days, All

⚠ Denotes that kit is due within 10 days and results have not been received.   🔺 Denotes that kit is due within 5 days and results have not been received.   * Date: mm/dd/yyyy

Due Date ▲▼	Ship Date ▲▼	Mailing ▲▼	Kit # ▲▼	Seq ▲▼	Status ▲▼	CAP # ▲▼
❭ 04/09/2019	03/18/2019	ELU-A 2019	31777403	1	Received	7185322-01
❭ 04/09/2019	03/18/2019	UAA-A 2019	31776574	1	Received	7185322-01
❭ 04/10/2019	03/19/2019	CAR-A 2019	31780480	1	Received	7185322-01
❭ 04/16/2019	03/25/2019	RBCAT-A 2019	31779027	1	Not Received	7185322-01
❭ 04/16/2019	03/25/2019	S-A 2019	31776007	1	Pending Approval	7185322-01
❭ 04/23/2019	04/01/2019	AHIV-A 2019	31776210	1	Not Received	7185322-01
❭ 04/23/2019	04/01/2019	D9-A 2019	31777243	1	Not Received	7185322-01

Click on **Drop down arrow** to access the result form

Sorted by date due, colored flags indicate kits due within 5 or 10 days

d. Click on **Black arrow** that corresponds to the PT kit that you need to enter.
e. 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.

🔽 03/15/2017   02/21/2017   ABF3-A 2017   29736415   1   Not Received   7185324-01

Step 1: Enter/Edit/View results   Washington Adventist Hospital
                                                                      Takoma Park,MD 20912-6367
Total of **2** page(s)
                                                                      OTHER ACTIONS

Page	Status	Date Received	Via	Data
1	Not Received			Enter Data
2	Not Received			Enter Data

PRINT A BLANK RESULT FORM
VIEW/PRINT YOUR SAVED DATA
VIEW KIT TRANSACTION HISTORY
VIEW KIT INSTRUCTIONS
CONTACT US

Step 2: Review and submit results
This button is enabled only when results are entered and saved.

APPROVE AND SUBMIT TO CAP

Results entered and saved online must be approved before they can be processed and evaluated by the CAP. Pages/data left in "Pending Approval" status after the due date will not be processed/evaluated. Click APPROVE AND SUBMIT TO CAP to review and submit your results.

Click on **Enter Data** to access the result form pages

2. Entering Test Data
   a. Once testing has been completed in accordance with the applicable technical procedure and QA procedure *Proficiency Test Handling and Result Submission*, you will either perform manual data entry to the CAP site or the results will transmit online through Data Innovations for quantitative tests. **Note:** results that exceed the CRR (contain qualifying symbols, such as > or <) will NOT transmit via DI. These must be manually entered.
   b. For manual entry, transfer results from hard copy 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*

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RESULT FORM DATA ENTRY

Mailing: CM-A 2017 / Kit: 29737363

View Kit Instructions >> | View Images >> | View / Print >> | Back to Result Form Data Entry Kit Details

Step 1: Enter/Edit/View Results

<< <   Go to   Page 2 ▼   > >>   **SAVE**

Last Updated: January 20, 2017

CM-A
2017
(CMP,CMP2,CMP3)

CAP

Page 2

Results must be received at the CAP no later than
midnight, Central Time by the due date below:

March 15, 2017

KIT 29737363 6 02 05

CAP # 7185324 - 01 SEQ # 01

Products:CMP
Washington Adventist Hospital
Zanetta Morrow MLS(ASCP)
TEL# 1-301-891-5681 FAX# 1-301-891-5037

> Click on data entry fields (boxes) to key in results, method codes, etc.

Specific Gravity   Alert! When reporting a high quantitative value, do not choose a response greater than

	Method Code 010	1534	Instrument Code 020	2676	Exception Code 030 ○ 1 ○ 33
	CM-01		CM-02		CM-03
	040 #.###		060 #.###		080 #.###

   c. Key data into each applicable field.

   d. Before leaving the page verify that the Method Code, Instrument Code, and unit of measure correspond with our method, instrument, and reporting unit of measure.

       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.

   e. Save each page using the 'SAVE' button at bottom of each page.

   f. NOTE: **Select and save <u>each</u> page, even when there is no data to enter**

   g. On the Attestation page, type in name(s) of technologist(s) who performed testing.

   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 'Other Actions' 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.

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

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

3.   When data is submitted via the DI interface, the Kit Transaction History will display the User as LAB2PT:

Kit Transaction History is the only way to determine how the results were input into the CAP. Review each page to verify method, instrument and units of measure as described for manual data entry and submit all paperwork to the supervisor when complete. **(See step 4-g** for use and printing Kit Transaction History)

4.   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**

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.

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5. View data
    a. Log in, select **e-*LAB* solutions**, select Proficiency Testing / Quality Management, "select or change lab" (as needed), select **Result Form Data Entry**
    b. Click the **Drop down arrow** 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-Gholston
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-Gholston
2	3/6/2017	Header: add other sites Section 5: update CAP screen shots and instructions	L Barrett	C Bowman-Gholston
3	5/17/19	Header: updated parent facility Section 5: updated CAP screen shots, add online resulting via DI Section 9: deleted appendix (content is within SOP)	L Barrett C Bowman-Gholston	C Bowman-Gholston

9.   ADDENDA AND APPENDICES
        None

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