

PTC Customer Portal Overview

December 8, 2023

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Portal Overview

1.0 Logging In

The login page is the first view you will see when logging into the Portal. This page has three options:

- [Register now](#): A new Participant will select this option. This will open subsequent pages for recording Participant information such as organization name, contact information, shipping address, etc.
- [Forgotten Password](#): If you have forgotten your password, selecting this will send you an email with a link to change your password. (**Note:** following go-live of the new system, all existing customers will have to use the [Forgotten Password](#) option upon their first login so that they can set their password).
- [Login](#): This button will take you to the Lab Management page

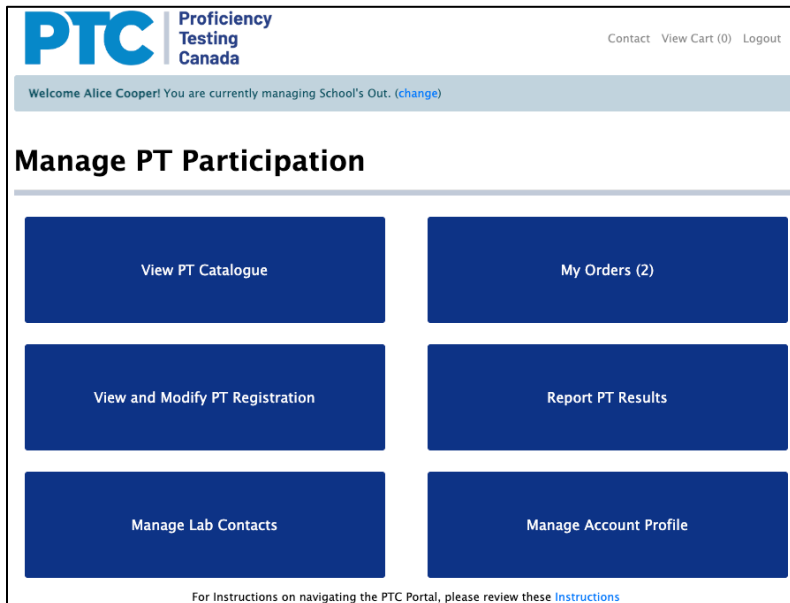
The screenshot shows the PTC Proficiency Testing Canada login page. At the top left is the PTC logo and the text 'Proficiency Testing Canada'. At the top right is a 'Contact' link. Below the header is a 'Welcome!' message. The main section is titled 'Log in' and contains two input fields: 'Email / Username' with the value 'communications@ptcanada.org' and 'Password' with a masked password. To the right of the password field is a 'Forgotten Password' link. At the bottom right is a 'Log in' button. At the bottom left, there is a link for 'Not registered yet?' and a 'Register now' link.

1.1 LAB SELECTION

If you are a contact for more than one Laboratory, you will select the Laboratory name from the drop-down list that you want to view and then press the [Select](#) button. This will take you to the main Portal page.

The screenshot shows the PTC Proficiency Testing Canada Lab Management page. At the top left is the PTC logo and the text 'Proficiency Testing Canada'. At the top right are 'Contact' and 'Logout' links. Below the header is a 'Welcome Alice Cooper!' message. The main section is titled 'Lab Management'. There are two main panels: 'Company Information' and 'Contact Information'. The 'Company Information' panel shows 'dghdg' and 'Ottawa K1C 5V5'. It has a 'Select Laboratory' dropdown menu with 'School's Out' selected and a 'Select' button. The 'Contact Information' panel shows 'Alice Cooper' and 'communications@ptcanada.org', with an 'Update Contact Information' link.

2.0 Main Portal Page

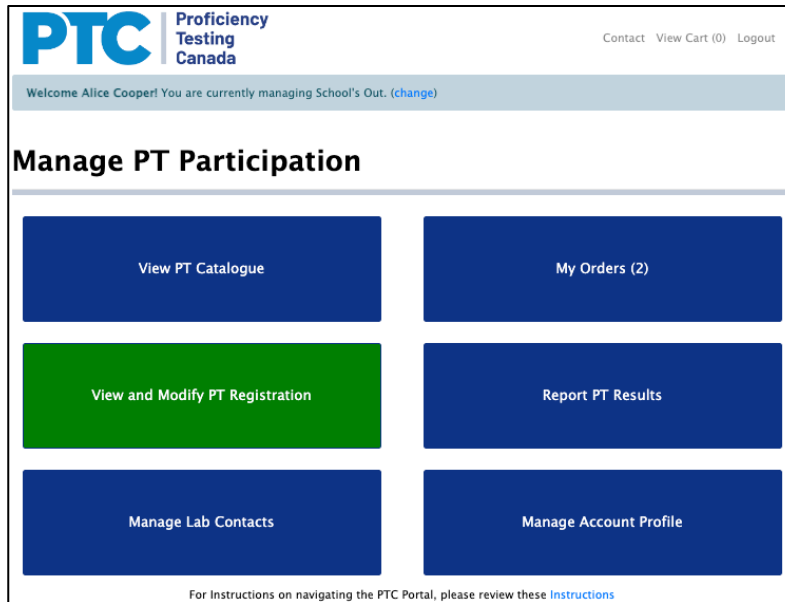


The Main Portal page has six options to select from:

- [View PT Catalogue](#): will open the PTC catalogue.
- [View and Modify PT Registration](#): will allow you to view what you are currently registered for and to add or remove PT registrations.
- [Manage Lab Contacts](#): will allow you to grant Portal access to other individuals and to grant them various permission levels.
- [My Orders](#): will allow you to view open orders and to pay them by credit card or to print an invoice for processing. The number beside [My Orders](#) indicates the number of orders that are open for payment.
- [Report PT Results](#): allows you to report results for a PT round.
- [Manage Account Profile](#) allows you to change information about the organization.

Depending on the level of permission that has been granted to you by your laboratory's primary contact, one or more of these options may not be available.

2.1 VIEW AND MODIFY PT REGISTRATION



Selecting the [View and Modify PT Participation](#) option opens a page containing a list of all PT Test Groups that are available. Your currently registered Test Groups will appear at the top of the grid and have a Y in the Registered column.

In addition to this, you can download a detailed list of your current registrations by selecting the [View Detailed PT Registration](#) button.

2.1.1 Modify PT Registration

For each registered test group there are four options available:

- **Test Group:** details such as volume provided, concentration range and preservative can be viewed by selecting the [Test Group](#) in the Test Group column
- **Delete:** Selecting this will remove all registration for that Test Group. This will also modify any open Order up until the published registration deadline.
- **Modify:** Selecting this will open another view that provides details about your registration for the selected Test Group.

The screenshot shows the 'Manage PT Registration' page. At the top, there is a navigation bar with the PTC logo, the text 'Proficiency Testing Canada', and links for 'Contact', 'View Cart (0)', and 'Logout'. Below this is a welcome message: 'Welcome Jonus Crump! You are currently managing ABC Labs. (change)'. The main heading is 'Manage PT Registration'. Below the heading is a button labeled 'View Detailed PT Registrations'. Below the button is a table with the following columns: 'Test Group...', 'Test Group', 'Schedule', 'Member Fee', 'Non Memb...', 'Registered', and 'Action'. The table contains five rows of data:

Test Group...	Test Group	Schedule	Member Fee	Non Memb...	Registered	Action
C01A	C01A Major Ions in Water	Mar/Oct	\$285.00	\$360.00	Y	Modify Delete
C01B	C01B Simple Nutrients in Water	Mar/Oct	\$235.00	\$305.00	Y	Modify Delete
C02A	C02A Metals in Water - Full Range	Mar/Oct	\$245.00	\$315.00	Y	Modify Delete
C02C	C02C Metals in Water - Total	Mar/Oct	\$255.00	\$325.00	Y	Modify Delete
C03	C03 Complex Nutrients in	Mar/Oct	\$210.00	\$265.00	Y	Modify Delete

Below the table is a pagination bar showing '1' selected, '100' items per page, and '1 - 60 of 60 items'. At the bottom right, there is a note: 'For Details on Test Groups, refer to [PT Catalogue](#)'. There are also 'Back' and 'Add PT' buttons.

Selecting **Modify** from the above view will open a view listing the Analyte/Methods in that Test Group that your laboratory is currently registered for. There are four fields that you can modify in addition to an action that can be taken:

- **Schedule:** For any Test Group you can opt for the default (twice per year), one round per year or a one-time participation (next round).
- **Number of Sample Sets:** The default is one but you can increase this if you need more sample volume to perform the analysis.
- **Additional Information** (optional): You can enter any text in this field. Typically, this would be an SOP ID or a preparation method. Anything entered here will appear in the PT report.
- **RDL** (optional): If you enter the reporting detection limit for this analyte, it will be accounted for in the performance evaluation.
- **Delete:** will remove that Analyte/Method from your PT registration.

Note: If changes are made to the **Schedule** or the **Number of Sample Sets**, the **Save** button located above the note must be selected. For changes to **Additional Information** or **RDL** will require that you select the **Save changes** button located above the grid.

Modify PT Registration

C01B Simple Nutrients in Water

Next Scheduled Shipment: Sunday, March 10, 2024

Schedule:

Number Of Sample Sets:

Note: Please use the Save button to save any information entered in the fields above and use the Save changes button to save any information entered in the grid below.

Save changes

PT Code	Analyte	Method	Addition In...	RDL	Units	Delete
PT-003345	Phosphate	COLORIMETRIC			mg/L-P	Delete
PT-003344	Organic Carbon	COLORIMETRIC			mg/L	Delete
PT-003642	Bromide	COLORIMETRIC			mg/L	Delete
PT-003643	Nitrite	COLORIMETRIC			mg/L-N	Delete

1 - 4 of 4 items

2.1.2 Adding New PT

To add new PT to your registration, press the **Add PT** button from the main **View and Modify PT Registration** page (2.1.1 above). This will open a drop-down list of available Test Groups.

Contact View Cart (0) Logout

Welcome Alice Cooper! You are currently managing School's Out.. (change)

New PT Registration

Select a Test Group

- C01A Major Ions in Water
- C01B Simple Nutrients in Water
- C02A Metals in Water - Full Range
- C02B Metals in Water - High Range
- C02C Metals in Water - Total
- C03 Complex Nutrients in Water
- C04A Solids in Water
- C04B BOD in Water
- C04C Turbidity in Water
- C04D COD in Water

Selecting the Test Group you are interested in will open a registration page. The default [Number of Sample Sets](#) and [Schedule](#) will appear but these may be changed. The other fields to enter are:

- **Method** (Mandatory): You will select the Method from a drop-down list.
- **Additional Information** (Optional): This is a text field that you can enter any text that you would like to see on the PT reports. To keep the reports to the minimum number of pages, you should keep the length of the text as short as possible.
- **RDL** (Optional): If you would like your reporting detection limit (RDL) accounted for in the evaluation of performance, you can enter the RDL in this field.

The [Bulk Method Select](#) drop-down can be used to populate all of the Method fields that are checked. To use this option, you must first select the check box to the left of Analyte in the header row.

The [Add to Cart](#) button adds the additions to the shopping cart.

A number beside the [View Cart](#) option at the top of the page denotes the number of items in the Cart.

2.1.3 Submitting Cart

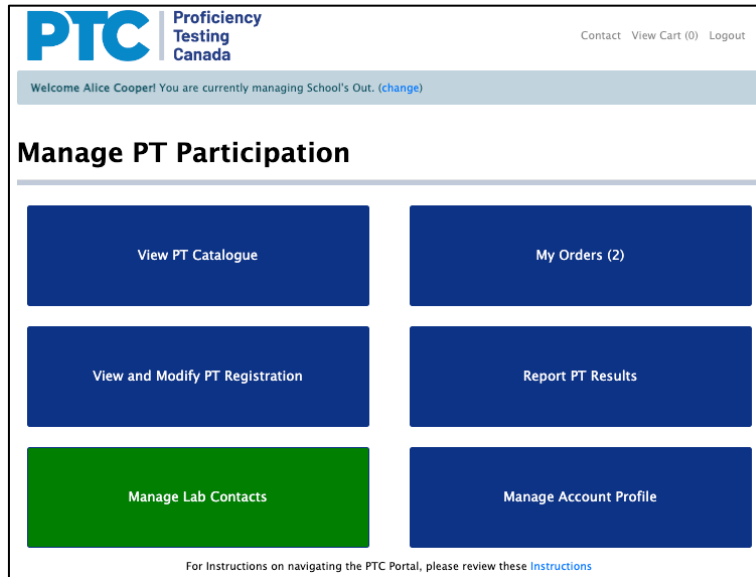
After all of the new registrations have been added to the cart you can submit them for official registration and participation by selecting the [View Cart](#) option at the top of any page. This will open a page detailing all of the items in the cart.

The options available are:

- **Delete**: Selecting this will delete the item from the cart.
- **Checkout**: Selecting this will submit all items in the [Cart](#) for inclusion in future PT rounds.

Note: It may take a couple minutes after adding Analytes to the cart before they will appear in the cart.

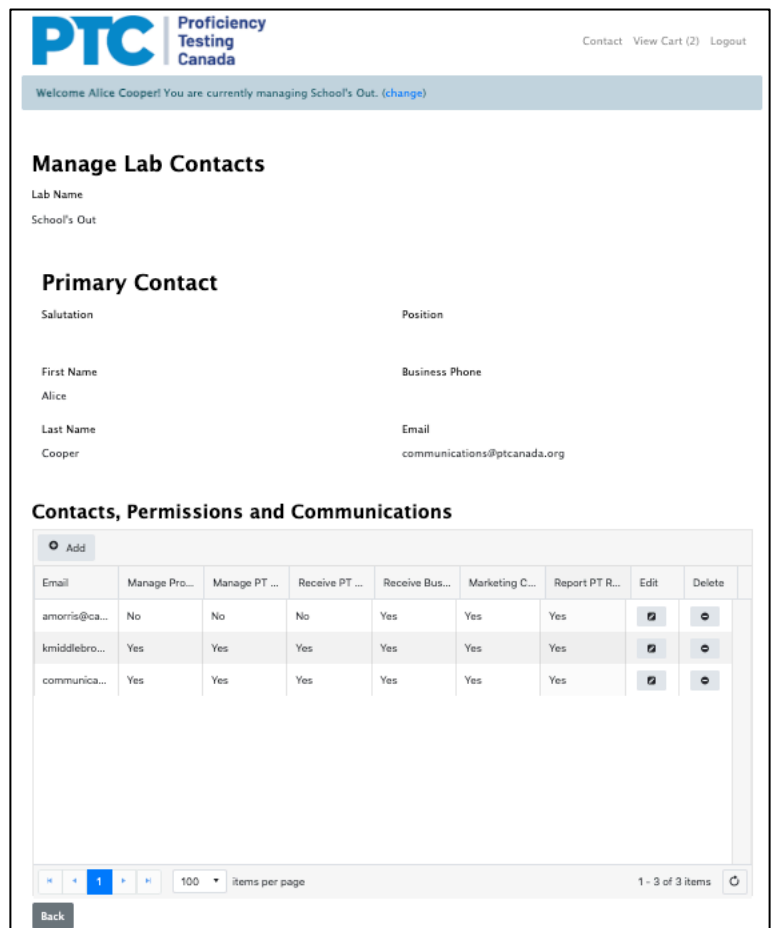
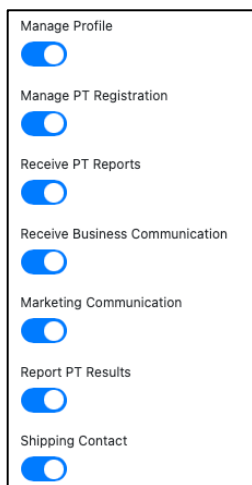
2.2 MANAGE LAB CONTACTS



The primary contact can add individuals to the laboratory profile and assign various privileges accordingly. After selecting [Manage Lab Contacts](#) from the main Portal page, the [Manage Lab Contacts](#) page will open.

On this page there are three options available:

- **Delete:** This will delete the individual as a contact for the organization.
- **Add:** This will open a window where you can enter the information about the new contact. When a new contact is added, an email will be sent to that individual to set their password.
- **Edit:** This will open a view with toggles where you can assign permissions to the new contact (see below).



2.3 MY ORDERS

The screenshot shows the 'Manage PT Participation' page in the PTC Customer Portal. The page header includes the PTC logo, 'Proficiency Testing Canada', and navigation links for 'Contact', 'View Cart (0)', and 'Logout'. A welcome message reads: 'Welcome Alice Cooper! You are currently managing School's Out. (change)'. The main content area features six blue buttons arranged in a 3x2 grid: 'View PT Catalogue', 'My Orders (2)', 'View and Modify PT Registration', 'Report PT Results', 'Manage Lab Contacts', and 'Manage Account Profile'. A footer note states: 'For instructions on navigating the PTC Portal, please review these [instructions](#)'.

If there is a number beside the [My Orders](#) option on the main Portal page, there is one or more unpaid order. Each order typically applies to a single PT round and is available for review and payment eight weeks before the shipping date for a PT round. Selecting [My Orders](#) will open a page detailing the open orders. Each row denotes an order and contains information such as the PT round, the Order ID, the total amount of the order and the status of the order (e.g., New, Complete, etc.)

The screenshot shows the 'My Orders' page in the PTC Customer Portal. The page header includes the PTC logo, 'Proficiency Testing Canada', and navigation links for 'Contact', 'View Cart (0)', and 'Logout'. A welcome message reads: 'Welcome Alice Cooper! You are currently managing School's Out. (change)'. The main content area features a table with the following data:

	PT Round	Order ID	Name	Purchas...	Total	Created ...	Status
<input checked="" type="checkbox"/>	PTR-001085	ORD-02080-H758J9	Order-C-1157		\$23,175.55	2/3/2023 4:03 PM	New
<input checked="" type="checkbox"/>	PTR-001086	ORD-02083-Q6B9Q0	Order-C-1157		\$10,863.15	2/3/2023 4:21 PM	New

Below the table, there is a pagination control showing '1' of 2 items per page and a 'Back' button.

If you select one of the orders, an [Order Details](#) page will open. The top part of the page provides details on the order with line-items, taxes, etc., and the bottom block includes a pdf Invoice that can be downloaded for processing. There are three options available from this page:

- [Purchase Order](#): If the [Purchase Order](#) field is changed a [Save](#) button will appear. If this [Save](#) button is pressed, the Order and pdf Invoice will be modified accordingly (this may take a few minutes).
- [Pay Now](#): Pressing the [Pay Now](#) button will open a secure credit card payment application.
- [Download Invoice](#): Below the Order Details is a [Documents](#) block containing a link to a pdf Invoice that can be downloaded for processing.

As long as an order is open, and up until two weeks before shipping, any changes made through the [View and Modify PT Registration](#) option (See 2.1 above), will be reflected on the order and Invoice. This update may take a few minutes.

Proficiency Testing Canada

[Contact](#) [View Cart \(0\)](#) [Logout](#)

Welcome Alice Cooper! You are currently managing School's Out. ([change](#))

Order Details

Order ID	ORD-02083-Q689Q0	Name	Order-C-1157
Status	New	Created On	Friday, February 03, 2023 4:21:51 PM
Purchase Order No	<input type="text"/>		
PT Round	PTR-001086		

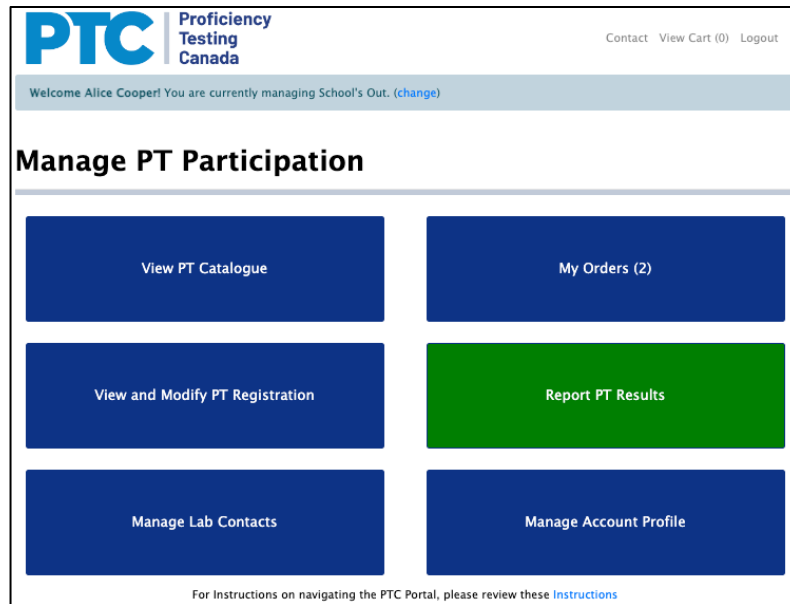
Product Name	Price Per Unit	Quantity	Extended Amount	Tax
C01A Major Ions in Water	\$335.00	1.00	\$378.55	\$43.68
C01B Simple Nutrients in Water	\$284.00	1.00	\$320.92	\$37.05
C02A Metals in Water - Full Range	\$284.00	1.00	\$320.92	\$37.05
C02B Metals in Water - High Range	\$284.00	1.00	\$320.92	\$37.05
C02C Metals in Water - Total	\$284.00	1.00	\$320.92	\$37.05
C03 Complex Nutrients in Water	\$237.00	1.00	\$267.81	\$30.94
C04A Solids in Water	\$222.00	1.00	\$250.86	\$28.99

Subtotal	Total Tax	Total Amount
\$9,436.42	\$1,226.73	\$10,663.15
Credit Amount Applied	Payment Required	Pay Now
	\$10,663.15	

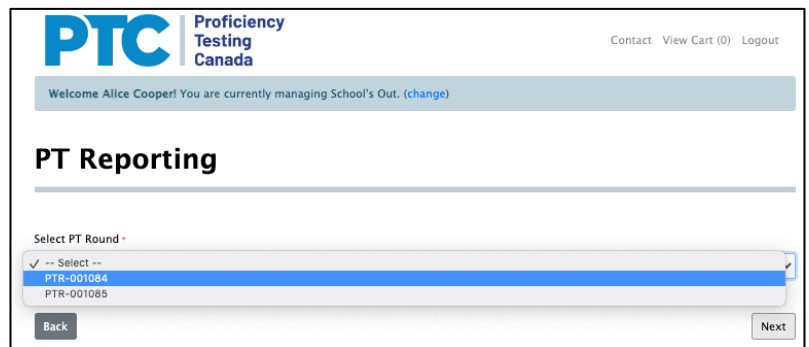
Documents

Document Name	Document Size	Created On	Modified On
School's Out Invoice - INV-02083-Q689Q0.pdf	13783 KB	2/3/2023 4:22:11 PM	2/3/2023 4:28:27 PM

2.4 REPORT PT RESULTS



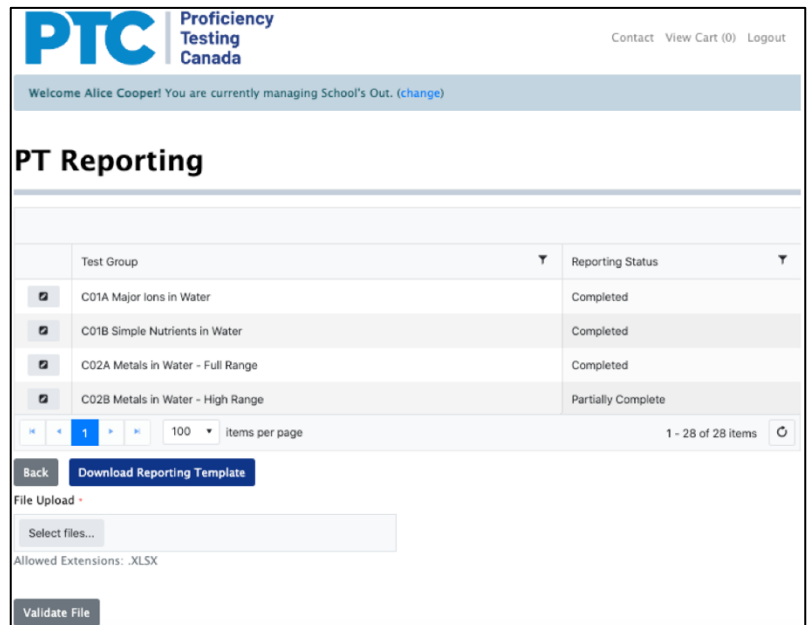
Selecting the [Report PT Results](#) option will open a page with a drop-down list containing any PT round that is available for reporting. Typically, there will only be a single round available for reporting.



Selecting the PT round will open a page containing all of the Test Groups that your lab can report results for in the selected PT round.

There are three ways of reporting results:

1. Report results manually, one Test Group at a time, using the online reporting grids;
2. Download an excel template for all data that your laboratory is expected to report in the PT round, complete the spreadsheet and then upload; or
3. Download excel templates for each Test Group separately, complete them, and then upload.



2.4.1 Manual Reporting

To manually report results for a Test Group, select one of the Test Groups from the page displayed above. This will open a grid containing a row for each registered Analyte/Method in the selected Test Group.

You can manually enter results for one or more Analyte/Method listed in the reporting grid. If you enter a result for an Analyte/Method you must enter all four results as well as the [Date of Analysis](#) that appears as a drop-down calendar in the right-hand column of the grid.

If you had included [Laboratory Information](#) or an [RDL](#) during registration, or added them in a previous PT round, they will appear in the reporting grid. These fields can be modified.

After entering results, select the [Save](#) button. Changes and additions can be made up until the reporting deadline.

Analyte /Methods can also be deleted by selecting Delete for the Analyte/Method in question. It will then be removed from current and ongoing registration.

Analyte	PT Code	Laborat...	Method	Units	Sample1	Sample2	Sample3	Sample4	RDL
Ammonia	PT-002449	1999	AUTO COL...	mg/L-N	19.6	2.9	8.9	9.9	
Bromide	PT-002450	1999	AUTO COL...	mg/L	9.43	1.91	5.42	3.00	
Nitrite	PT-002451	1999	AUTO COL...	mg/L-N	0.889	0.233	0.512	0.672	
Organic Ca...	PT-002452	1999	AUTO COL...	mg/L	19	7	17	6	
Phosphate	PT-002453	1999	AUTO COL...	mg/L-P	1.95	0.33	1.22	1.70	

2.4.2 Reporting Using an EXCEL Template

You can either download a template that contains all of the PT that you are analyzing in the selected PT round, or you can download separate templates for each Test Group separately.

To download a template, select the [Download Reporting Template](#) button. Enter the results and date of analysis (mm/dd/yyyy). Save the file and then upload it to the Portal by using the [Choose File](#) button, followed by the [Upload](#) button. Part of the upload includes a validation check to ensure that all information has been entered correctly. If there are any issues a message detailing the issues will appear.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Guid	TestGroup	Analyte	PTCode	LaboratoryInformation	Method	Units	Sample1	Sample2	Sample3	Sample4	RDL	DateOfAnalysis
2	bc8f70ff-f3a	C01B Simple Nutrients in Water	Ammonia	PT-002449	1999	AUTO COLOR	mg/L-N						
3	628f70ff-f3a	C01B Simple Nutrients in Water	Bromide	PT-002450	1999	AUTO COLOR	mg/L						
4	7f8f70ff-f3a	C01B Simple Nutrients in Water	Nitrite	PT-002451	1999	AUTO COLOR	mg/L-N						
5	db8f70ff-f3a	C01B Simple Nutrients in Water	Organic Carbon	PT-002452	1999	AUTO COLOR	mg/L						
6	9e8f70ff-f3a	C01B Simple Nutrients in Water	Phosphate	PT-002453	1999	AUTO COLOR	mg/L-P						

After pressing the [Upload](#) button, the data will appear in the manual reporting grid. If everything looks correct, select the [Save](#) button to submit it for later evaluation. Data can be modified and uploaded until midnight of the reporting deadline.

2.4.3 Reporting Results for Analyte/Methods that you are not Registered for

If you have received samples for a Test Group you can report additional results by pressing the [Add Analyte/Methods](#) button from the Test Group manual reporting grid.

The screenshot shows the PTC Proficiency Testing Canada interface. At the top, there is a navigation bar with 'Contact', 'View Cart (0)', and 'Logout'. Below this is a welcome message: 'Welcome Alice Cooper! You are currently managing School's Out. (change)'. The main heading is 'PT Reporting'. There is a button labeled 'Add Analyte Methods'. Below the button is a table with the following data:

Analyte	PT Code	Laborat...	Method	Units	Sample1	Sample2	Sample3	Sample4	RDL
Ammonia	PT-002449	1999	AUTO COL...	mg/L-N	19.6	2.9	8.9	9.9	

This will open a registration page. Select the additional analyte(s) that you want to report results for, select a [Method](#) from the drop-down list and select the [Save](#) button.

The screenshot shows the PTC Proficiency Testing Canada interface. At the top, there is a navigation bar with 'Contact', 'View Cart (0)', and 'Logout'. Below this is a welcome message: 'Welcome Alice Cooper! You are currently managing School's Out. (change)'. The main heading is 'New Analyte Method Registration'. There is a button labeled 'Bulk Method Select' and a dropdown menu labeled 'Please Select'. Below this is a table with the following data:

<input type="checkbox"/>	Analyte	Method	Additional Information	RDL	Units
<input checked="" type="checkbox"/>	C01B Ammonia	ION SELECTIVE ELECTRODE			mg/L-N
<input type="checkbox"/>	C01B Bromide				mg/L
<input type="checkbox"/>	C01B Nitrite				mg/L-N
<input type="checkbox"/>	C01B Organic Carbon				mg/L
<input type="checkbox"/>	C01B Phosphate				mg/L-P

At the bottom of the page, there are 'Back' and 'Save' buttons.

After a brief processing interval, a row will be added to the manual reporting grid that you can use to report additional results.

The screenshot shows the PTC Proficiency Testing Canada interface. At the top, there is a navigation bar with 'Contact', 'View Cart (0)', and 'Logout'. Below this is a welcome message: 'Welcome Alice Cooper! You are currently managing School's Out. (change)'. The main heading is 'PT Reporting'. There is a button labeled 'Add Analyte Methods'. Below the button is a table with the following data:

Analyte	PT Code	Laborat...	Method	Units	Sample1	Sample2	Sample3	Sample4	RDL
Ammonia	PT-002449	1999	AUTO COL...	mg/L-N	19.6	2.9	8.9	9.9	
Bromide	PT-002450	1999	AUTO COL...	mg/L	9.43	1.91	5.42	3.00	
Nitrite	PT-002451	1999	AUTO COL...	mg/L-N	0.889	0.233	0.512	0.672	
Organic Ca...	PT-002452	1999	AUTO COL...	mg/L	19	7	17	6	
Phosphate	PT-002453	1999	AUTO COL...	mg/L-P	1.95	0.33	1.22	1.70	
Ammonia	PT-003032		ION SELEC...	mg/L-N					

2.5 Manage Account Profile

The screenshot shows the PTC Customer Portal interface. At the top left is the PTC logo (Proficiency Testing Canada). To the right are links for 'Contact', 'View Cart (0)', and 'Logout'. A welcome message reads: 'Welcome Alice Cooper! You are currently managing School's Out. (change)'. The main heading is 'Manage PT Participation'. Below this are six blue buttons: 'View PT Catalogue', 'My Orders (3)', 'View and Modify PT Registration', 'Report PT Results', 'Manage Lab Contacts', and 'Manage Account Profile' (which is highlighted in green). At the bottom, there is a link to 'Instructions' for navigating the portal.

Selecting [Manage Account Profile](#) from the main Portal page will open a page that is pre-populated with the information that was provided during the initial registration. Any changes made will be reflected in all future correspondence and shipping.

The screenshot shows the 'Manage Account Profile' page. It features the PTC logo and 'Contact'/'Logout' links. A welcome message says 'Welcome Alice Cooper!'. The page is divided into two main sections: 'Company Information' and 'Shipping Information'.
Company Information:
- Company Name: School's Out
- Parent Company:
- Ownership Type: Private (dropdown menu)
Shipping Information:
- Attention To: Alice Cooper
- Email: communications@ptcanada.org
- Address Line 1: dghdg
- Address Line 2:
- City: Ottawa
- Country: Canada (dropdown menu)
- State/Province: Ontario (dropdown menu)
- ZIP/Postal Code: K1C 5V5