PTC Customer Portal Overview

June 18, 2024
Version 1.1

Proficiency
Testing
Canada

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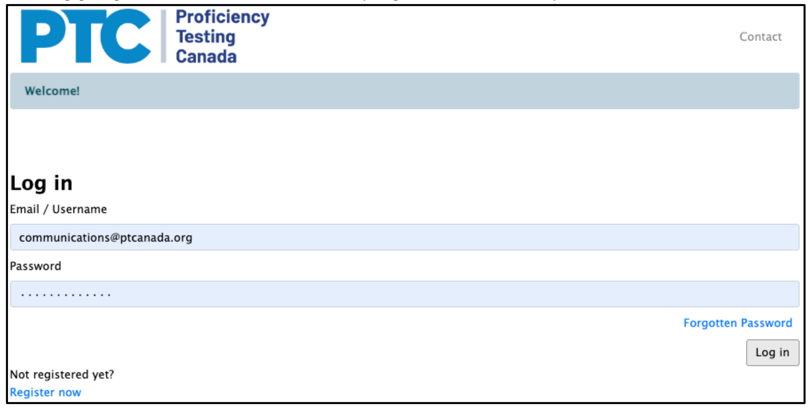
Portal Overview

1.0 Logging In

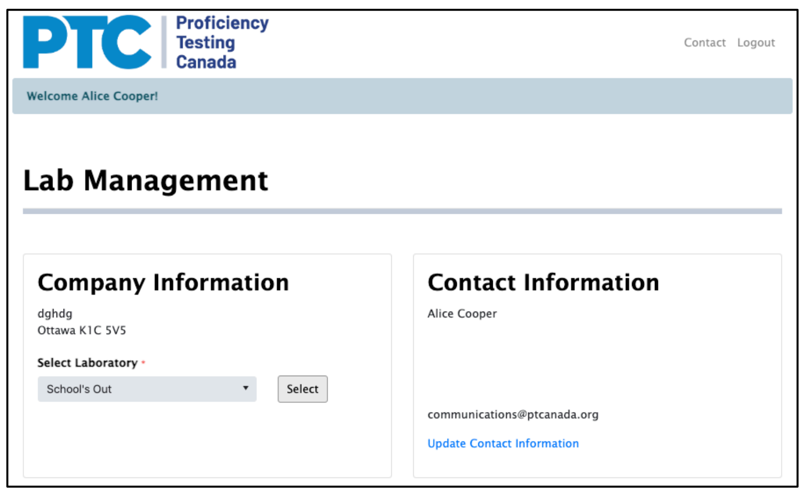
The login page is the first view you will see when logging into the Portal. This page has three options:

- 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
- Login: This button will take you to the Lab Management page

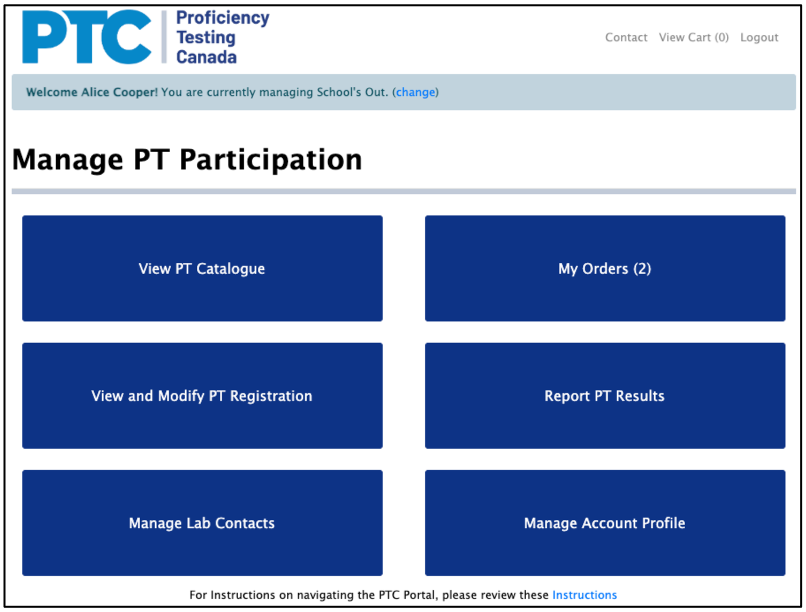


1.1 LAB SELECTION

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.



2.0 Main Portal Page

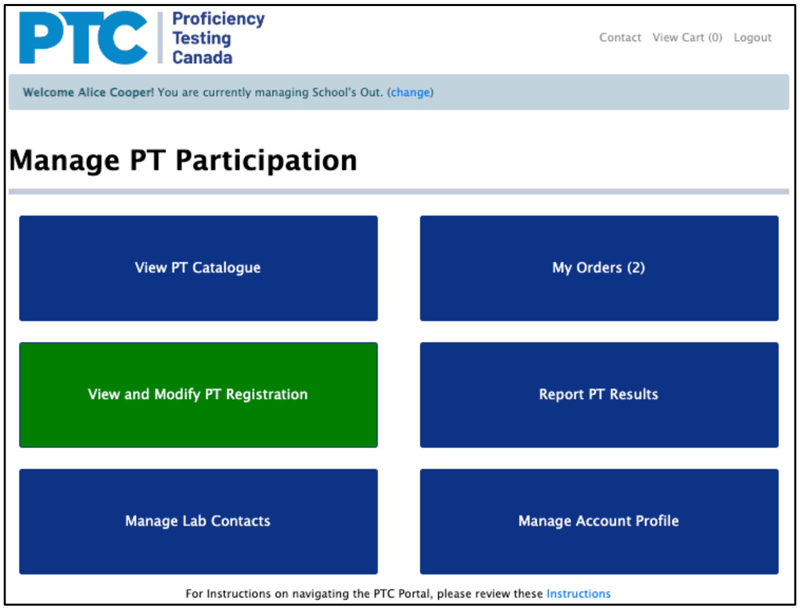


The Main Portal page has six options to select from:

- 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 the primary contact 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 download 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



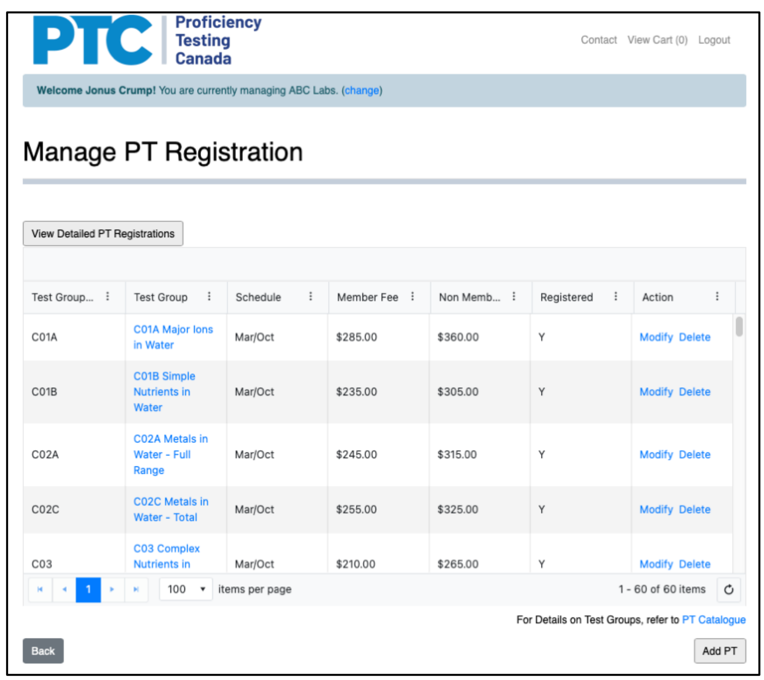
Selecting the View and Modify PT Participation option opens a page containing a list of all PT Schemes that are available. Your currently registered Test Groups will appear at the top of the grid and have a Y in the Registered column.

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

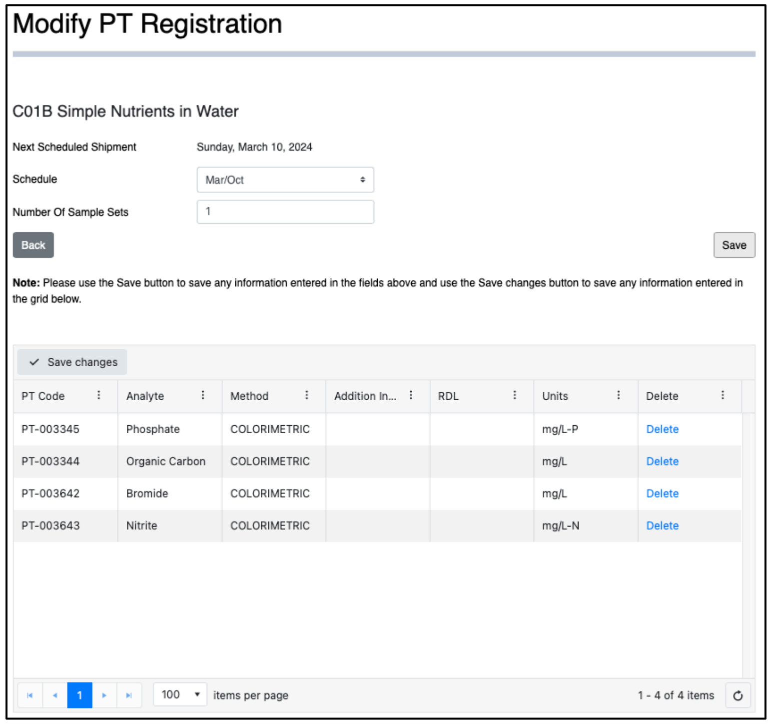
For each registered test group there are four options available:

- 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.



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:

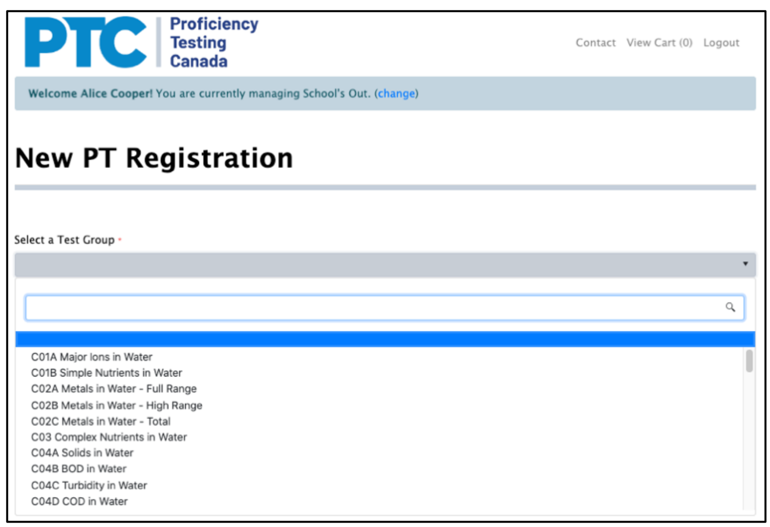
- Schedule: For any Test Group you can opt for the default (twice per year), one round per year or a one-time participation (next round).
- Number of Sample Sets: The default is one but you can increase this if you need more sample volume to perform the analysis.
- Additional Information (optional): 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.

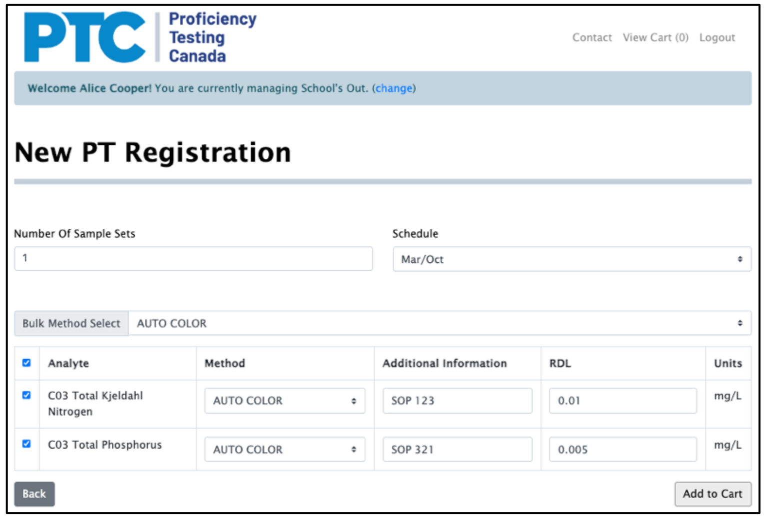
2.1.2 Adding New PT

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



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.



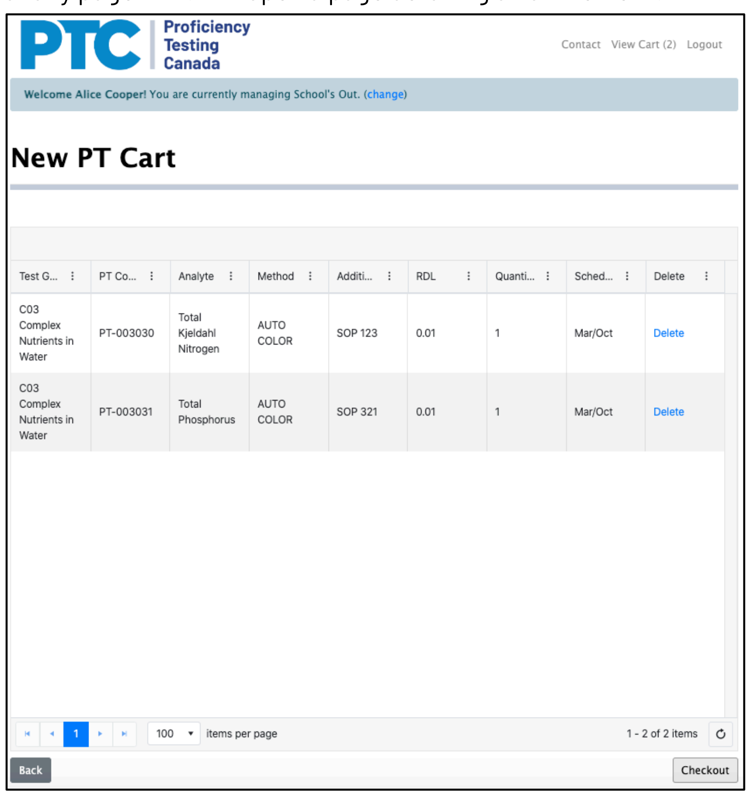
The Bulk Method Select drop-down can be used to populate all of the Method fields that are checked. To use this option, you must first select the check box to the left of Analyte in the header row.

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 View Cart at the top of any page. This will open a page detailing all of the items in the cart.

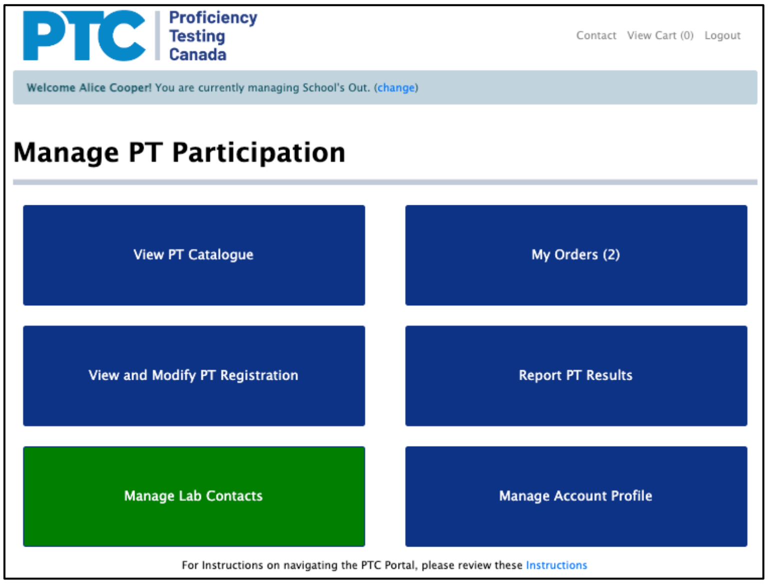


The options available are:

- 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.

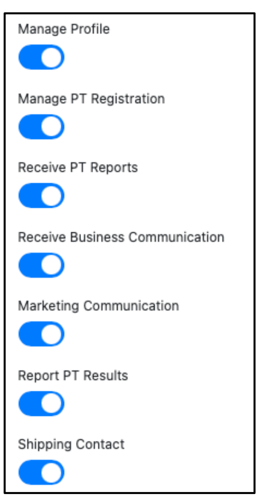
2.2 MANAGE LAB CONTACTS

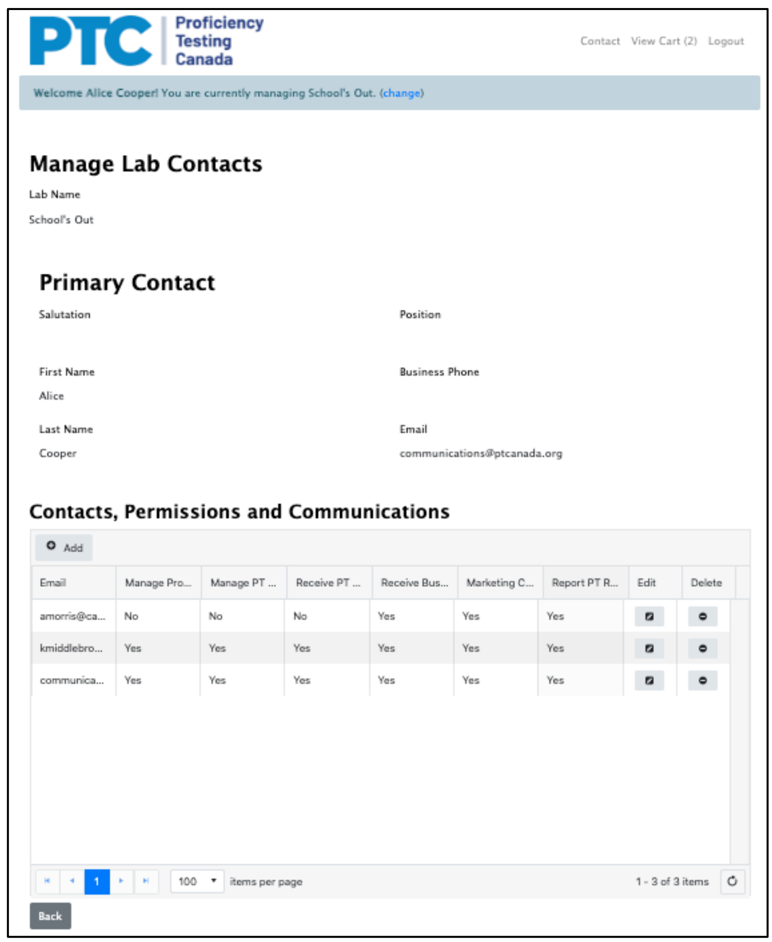


The primary contact can add individuals to the laboratory profile and assign various privileges accordingly. After selecting Manage Lab Contacts from the main Portal page, the Manage Lab Contacts page will open.

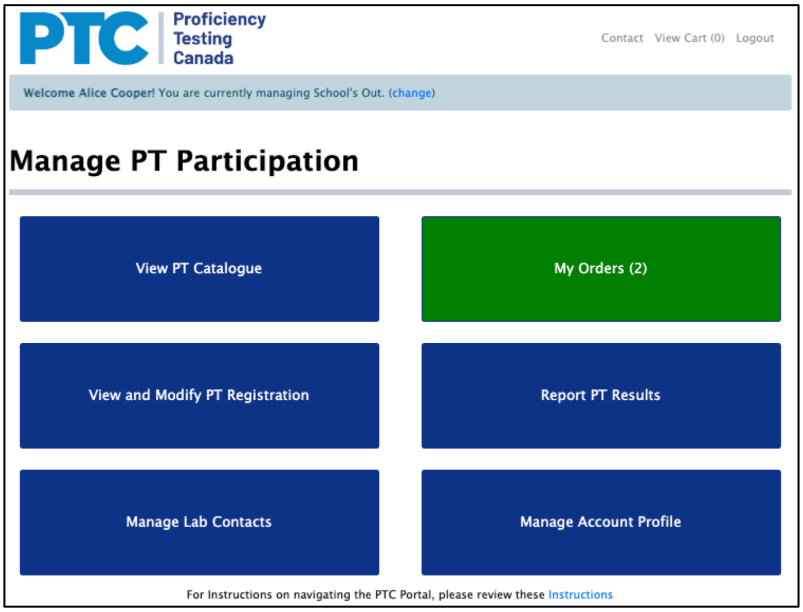
On this page there are three options available:

- 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).

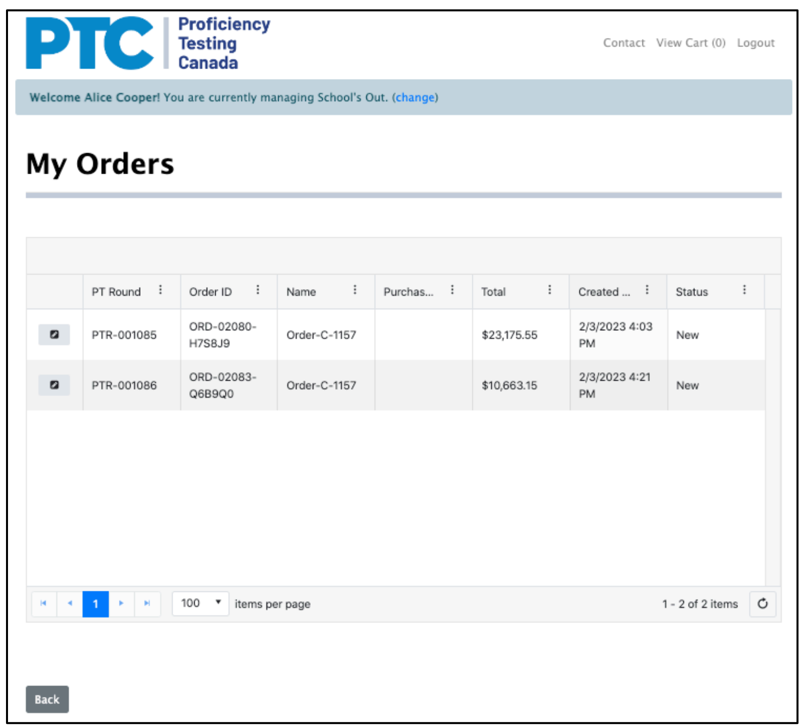




2.3 MY ORDERS



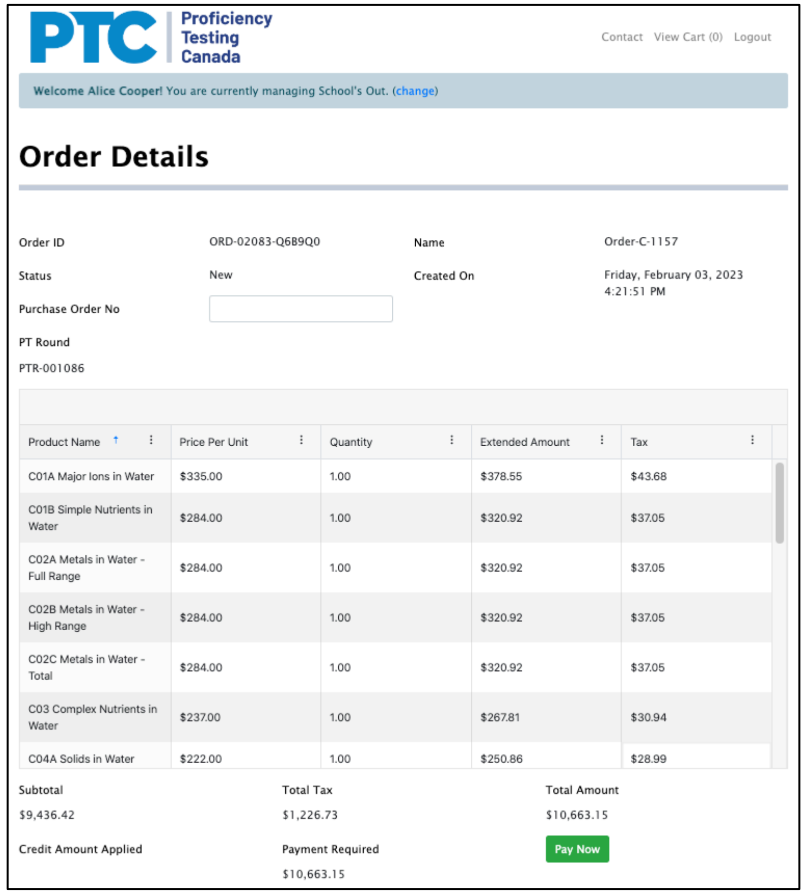
If there is a number beside the My Orders option on the main Portal page, there is one or more unpaid order. Each order typically applies to a single PT round and is available for review and payment eight weeks before the shipping date for a PT round. Selecting My Orders will open a page detailing the 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.)

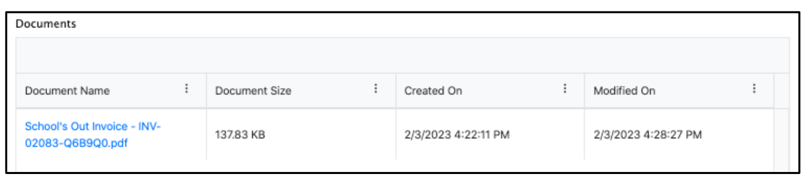


If you select one of the orders, an Order Details page will open. The top part of the page provides details on the order with line-items, taxes, etc., and the bottom block includes a pdf Invoice that can be downloaded for processing. There are three options available from this page:

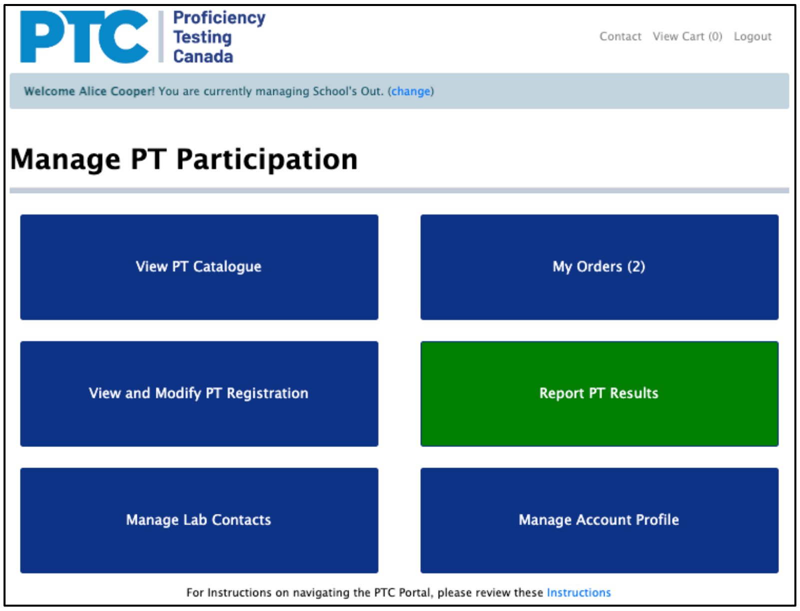
- Purchase Order: If the Purchase Order field is changed a Save button will appear. If this Save button is pressed, the Order and pdf Invoice will be modified accordingly (this may take a few minutes).
- Pay Now: Pressing the Pay Now button will open a secure credit card payment application.
- Download 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.

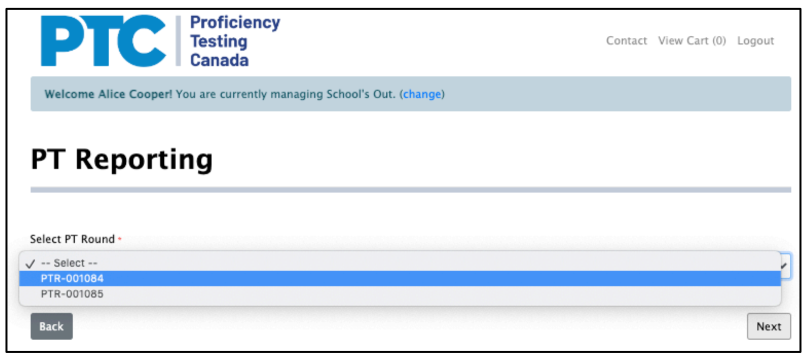




2.4 REPORT PT RESULTS



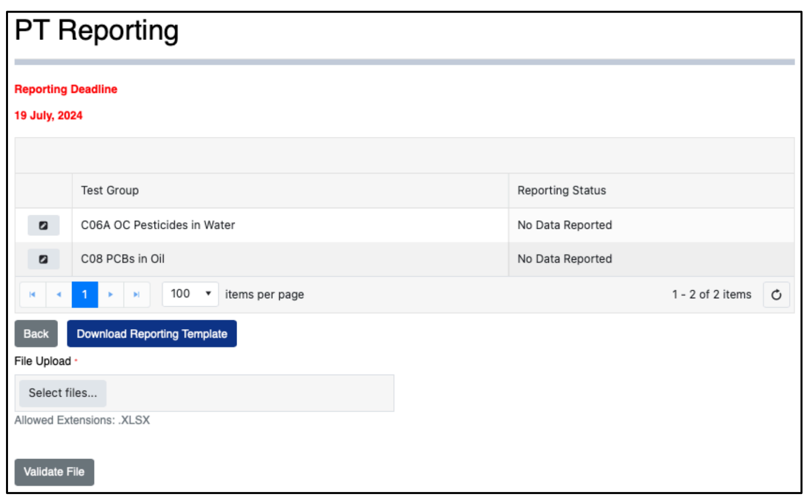
Selecting the Report PT Results option will open a page with a drop-down list containing any PT round that is available for reporting. Typically, there will only be a single round available for reporting.



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:

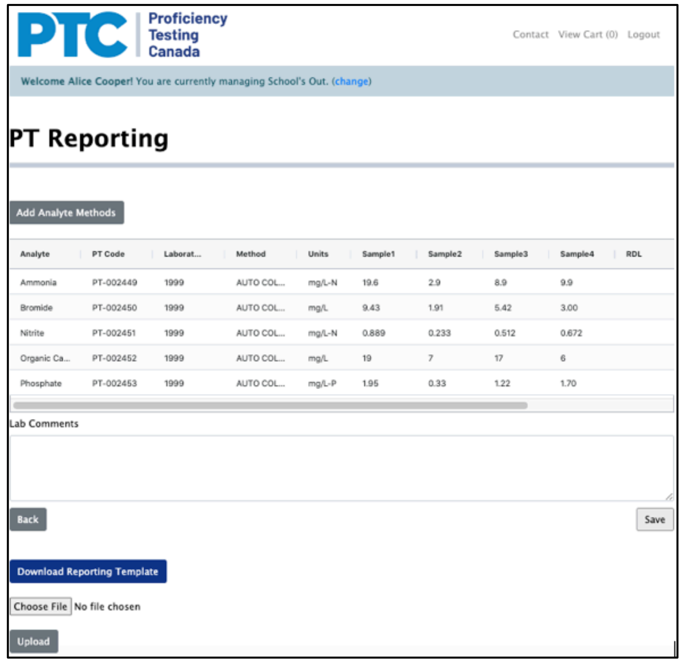
1. Report results manually, one Test Group at a time, using the online reporting grids;
2. Download an excel template for all data that your laboratory is expected to report in the PT round, complete the spreadsheet and then upload; or
3. Download excel templates for each Test Group separately, complete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

2.4.2 Reporting Using an EXCEL Template

You can either download a template that contains all of the PT that you are reporting for 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.

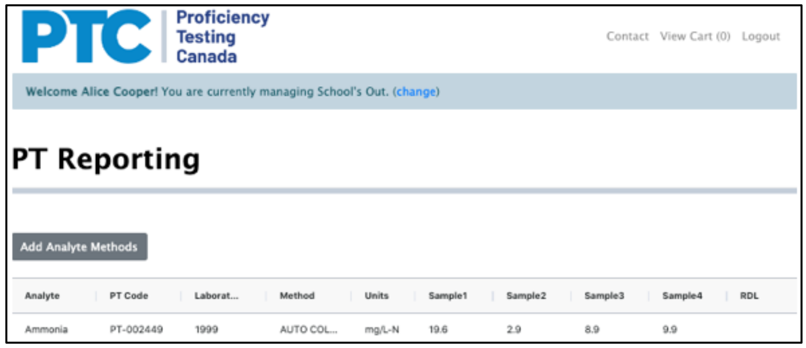
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Guid	TestGroup	Analyte	PTCode	LaboratoryInformation	Method	Units	Sample1	Sample2	Sample3	Sample4	RDL	DateOfAnalysis
2	bc8f70ff-f3a	C01B Simple Nutrients in Water	Ammonia	PT-002449	1999	AUTO COLOR	mg/L-N						
3	628f70ff-f3a	C01B Simple Nutrients in Water	Bromide	PT-002450	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.

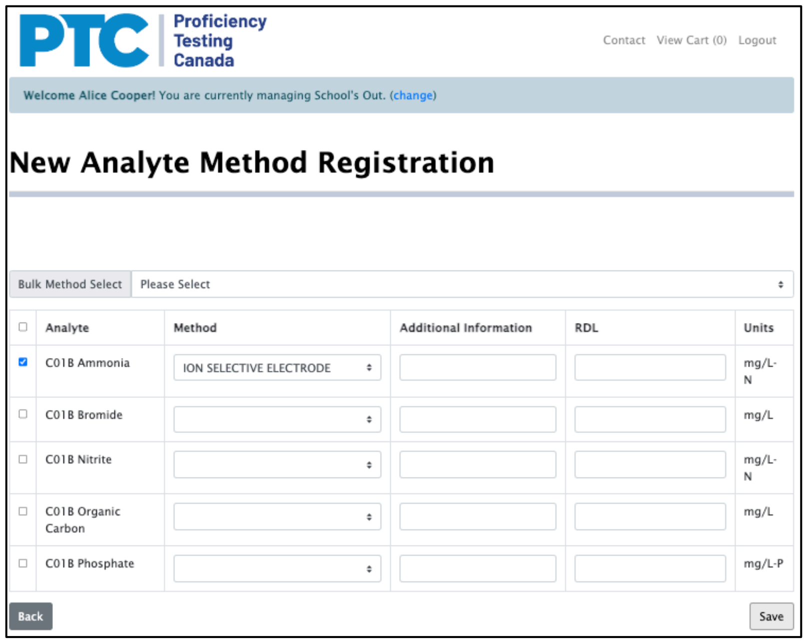
Note: The DateOfAnalysis cells must be formatted as text, not as a date.

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

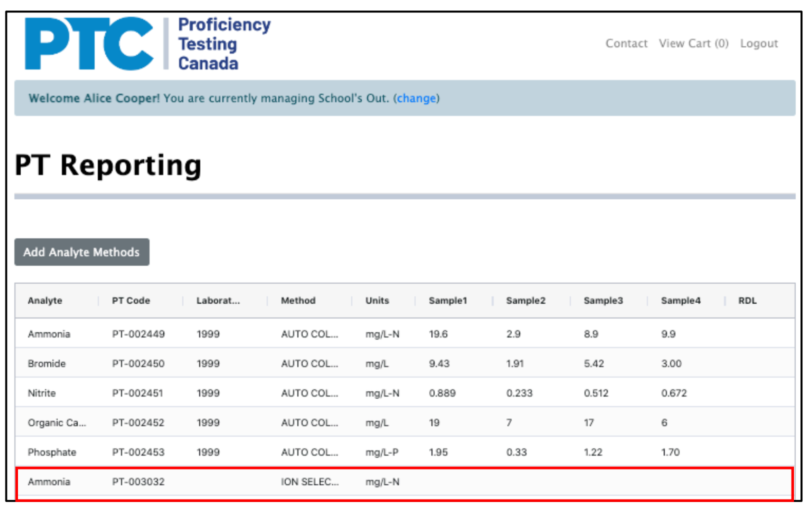
If you have received samples for a Test Group, you can report additional results by pressing the Add Analyte/Methods button from the Test Group manual reporting grid (see 2.4.1 above).



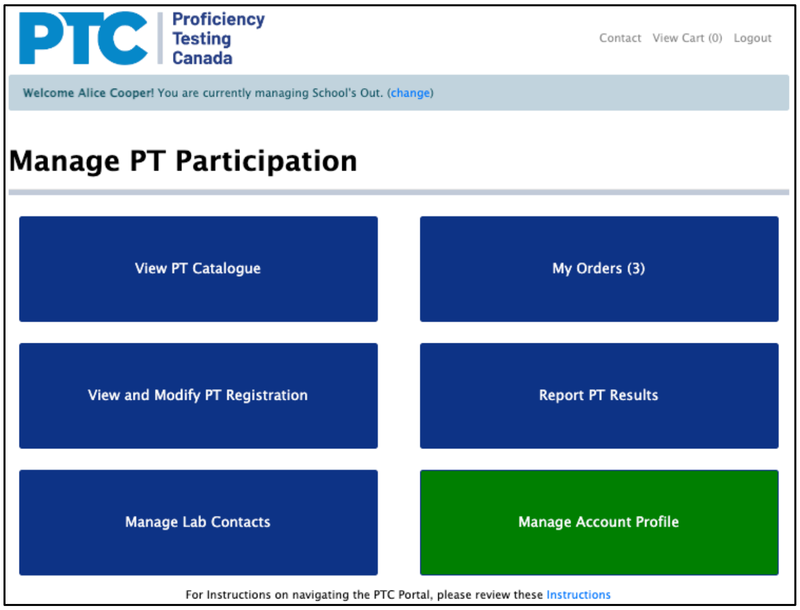
This will open a registration page. Select the additional analyte(s) that you want to report results for, select a Method from the drop-down list and select the Save button. You may also enter text in the Additional Information field. Any text entered here will appear in the PT reports. As well, you can enter the reporting detection limit (RDL). If this is entered, it will be accounted for in the evaluation.



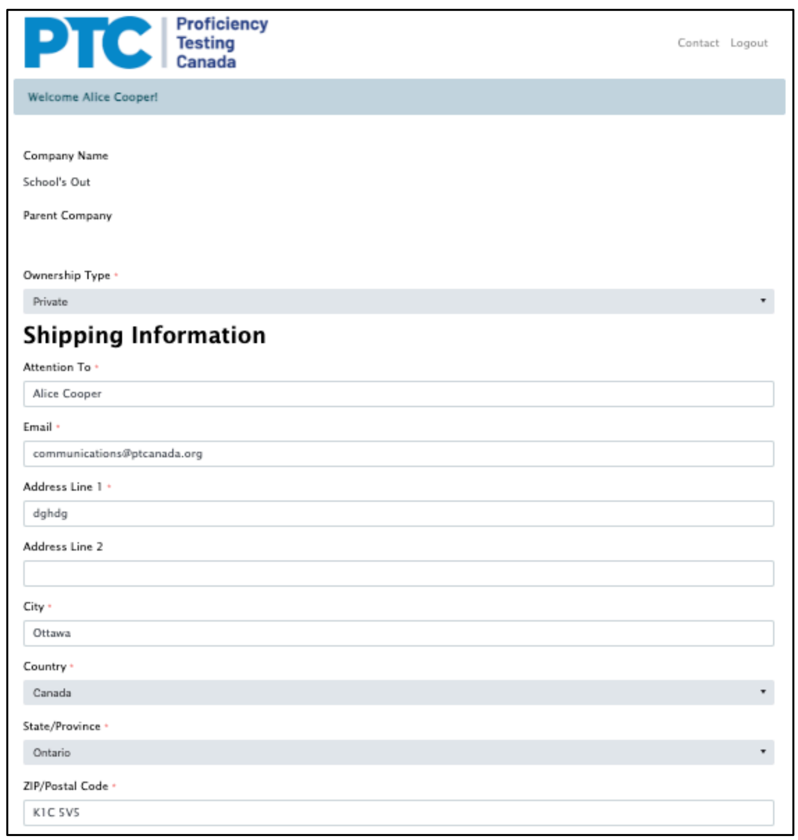
After a brief processing interval, a row will be added to the manual reporting grid that you can use to report additional results. You will have to refresh the grid before it will appear.



2.5 Manage Account Profile



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.



3.0 History of Changes

Date	Rev. No.	Sections	Changes
12/08/2023	1.0		Initial publication
06/18/2024	1.1		Updated to reflect changes made to Portal displays.