PTC Customer Portal Overview

February 16, 2023

Proficiency Testing Canada

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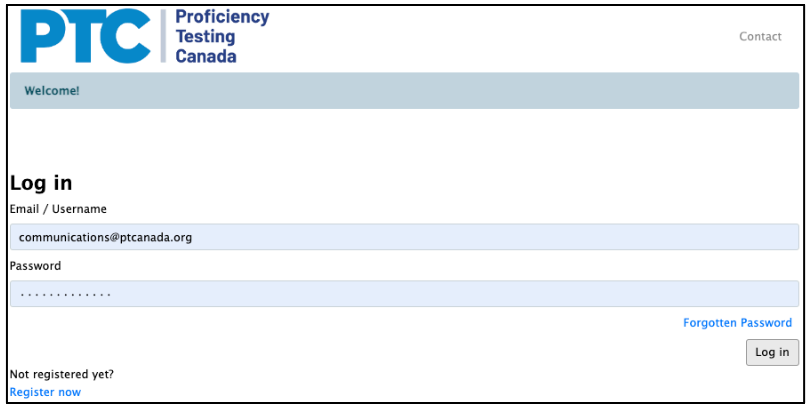
Portal Overview

1.0 Logging In

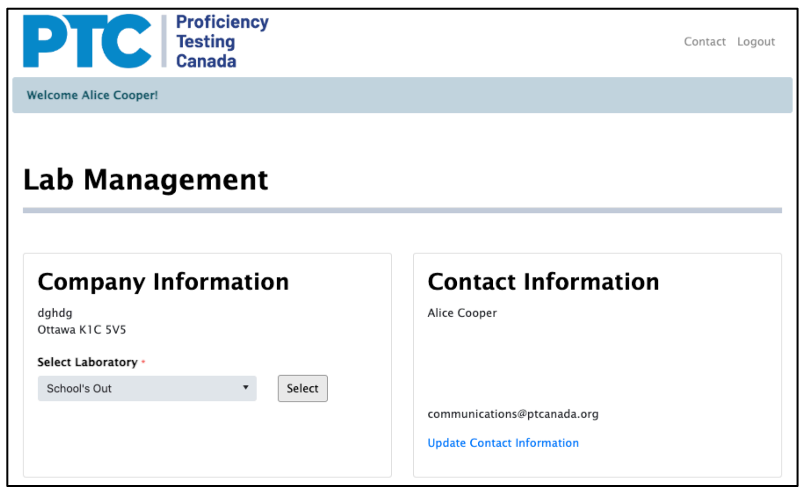
The login page is the first view you will see when logging into the Portal. This page has three options:

- 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



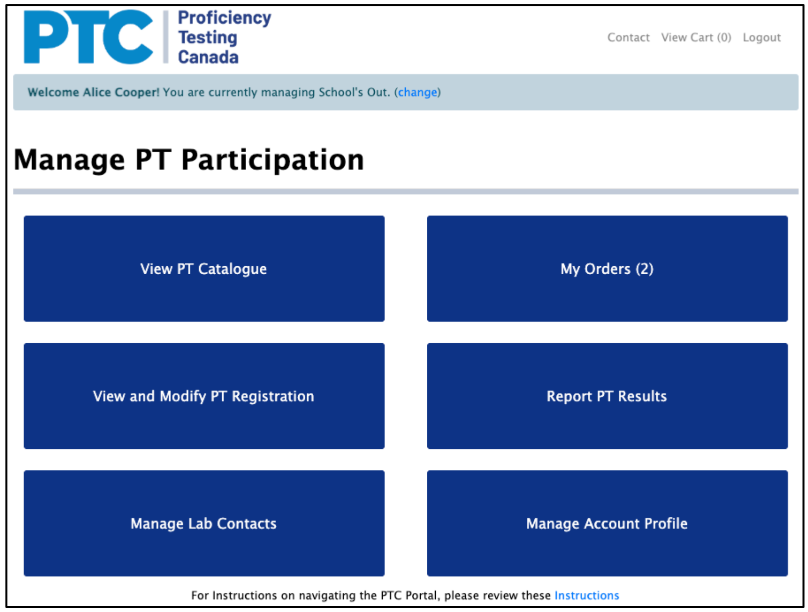
1.1 LAB SELECTION

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



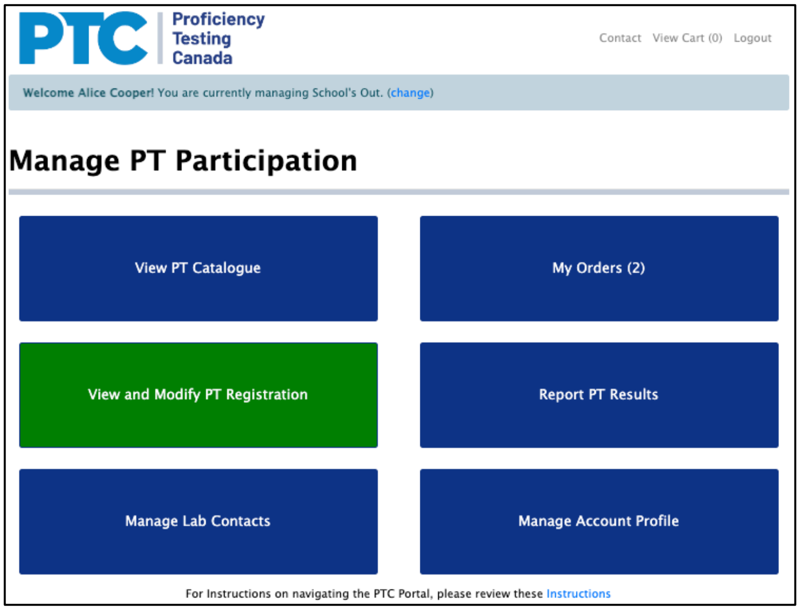
2.0 Main Portal Page

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 registrations.
- Manage Lab Contacts: will allow you to grant Portal access to other individuals and to grant them various levels of permission.
- 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.

2.1 VIEW AND MODIFY PT REGISTRATION

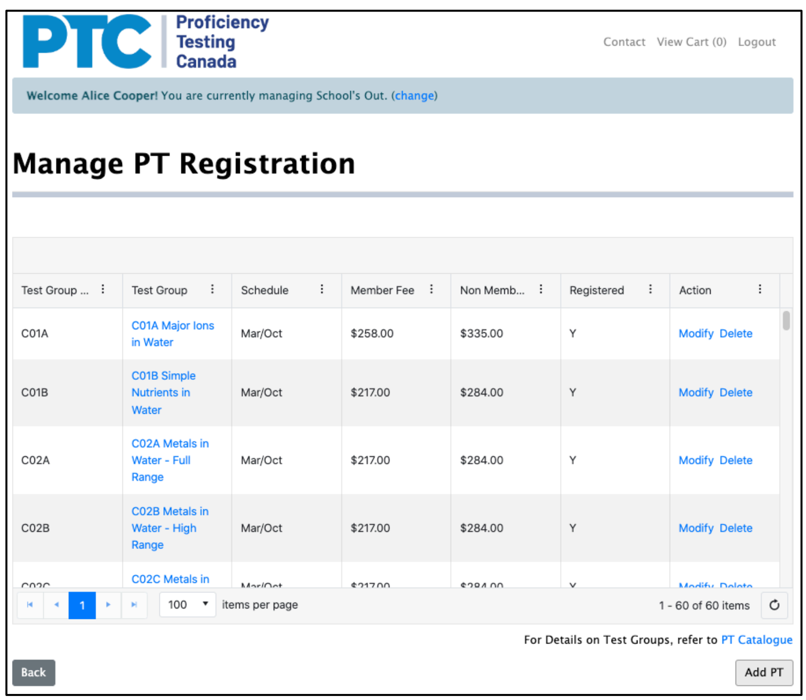


Selecting the View and Modify PT Participation option opens a page containing a list of all PT Test Groups that are available. Your currently registered Test Groups will appear at the top of the grid and have a Y in the Registered column.

2.1.1 Modify PT Registration

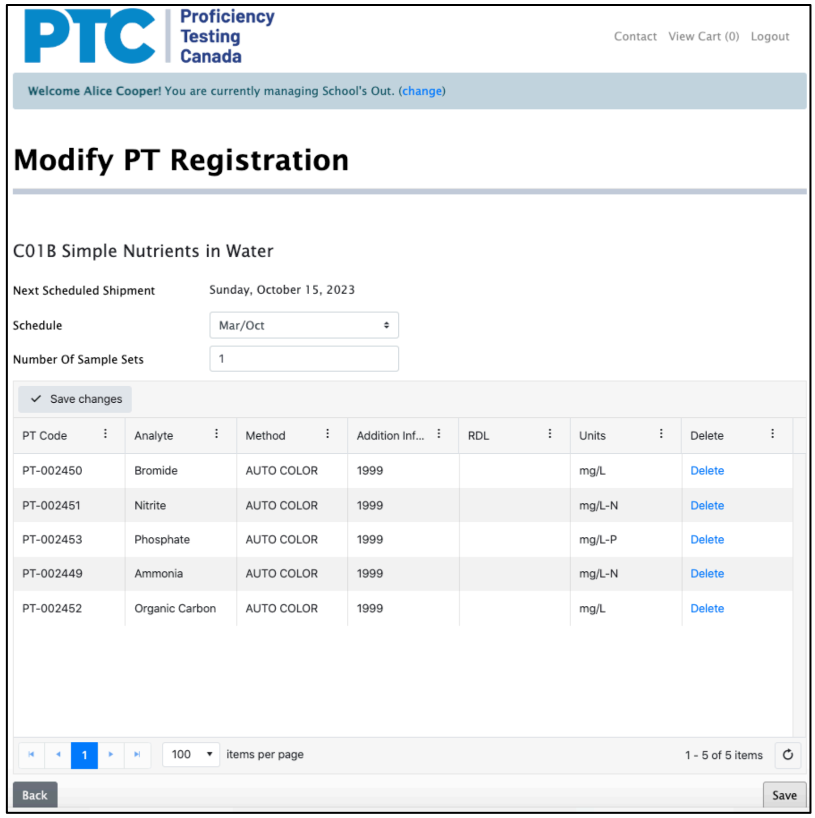
For each registered test group there are four options available:

- 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.
- Modify: Selecting this will open another view that provides details about your registration for the selected Test Group.



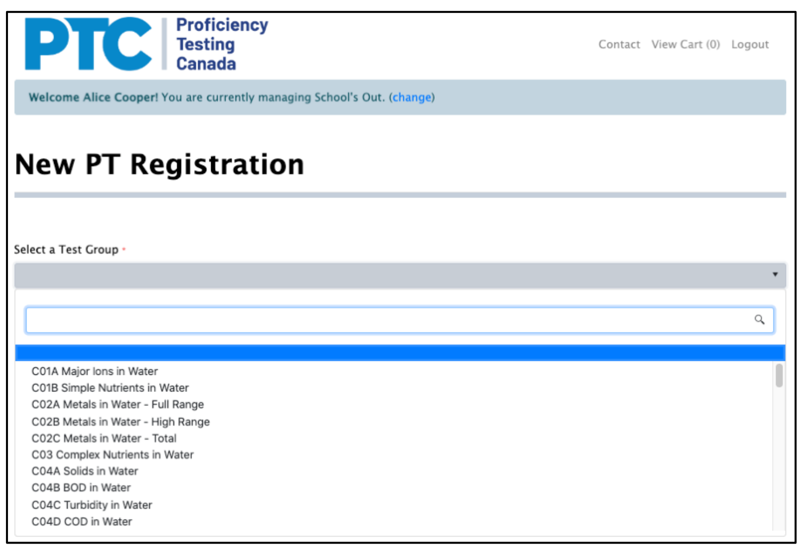
Selecting Modify from the above view will open a view listing the Analyte/Methods in that Test Group that your laboratory is currently registered for. There are four fields that you can modify in addition to an action that can be taken:

- 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.



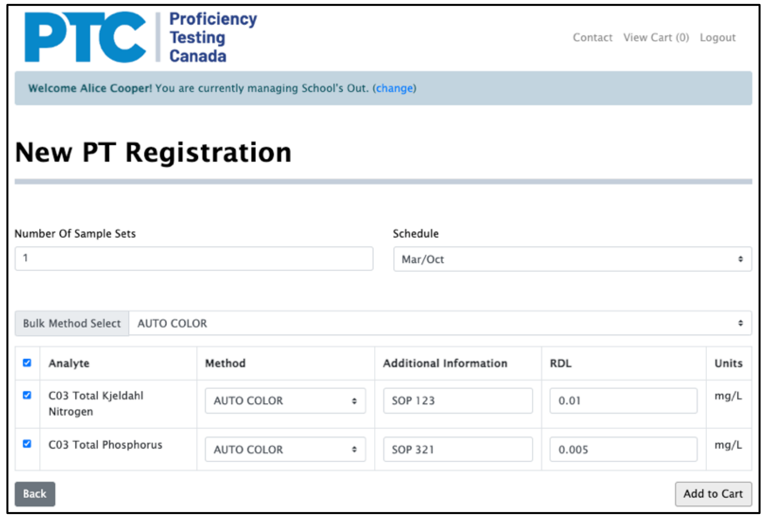
2.1.2 Adding New PT

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.



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:

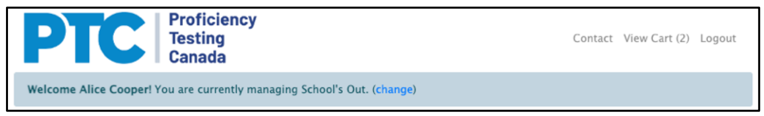
- Method (Mandatory): You will select the Method from a drop-down list.
- Additional Information (Optional): This is a text field that you can enter any text that you would like to see on the PT reports.
- RDL (Optional): If you would like your reporting detection limit (RDL) accounted for in the evaluation 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.

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.

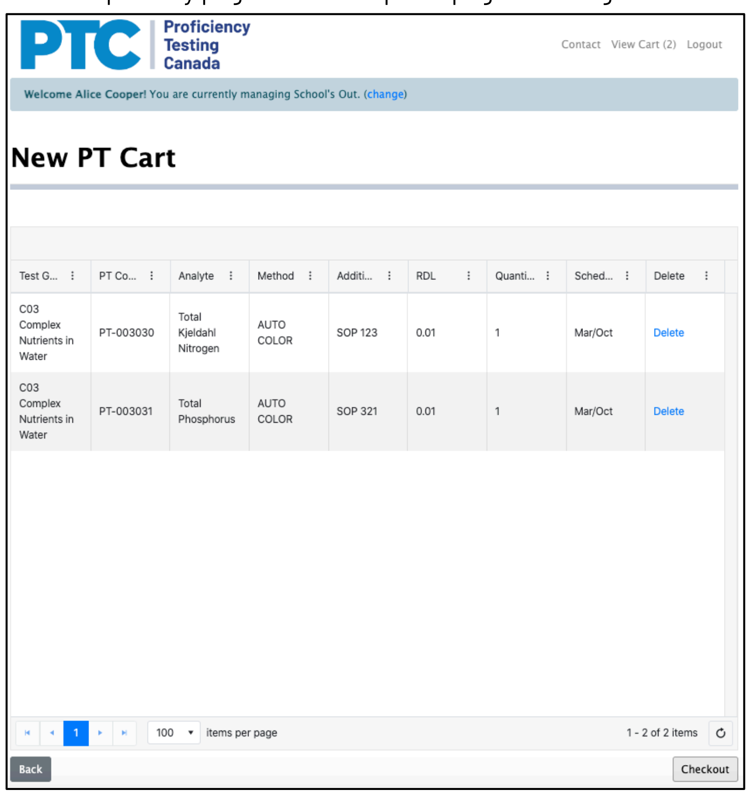


2.1.3 Submitting Cart

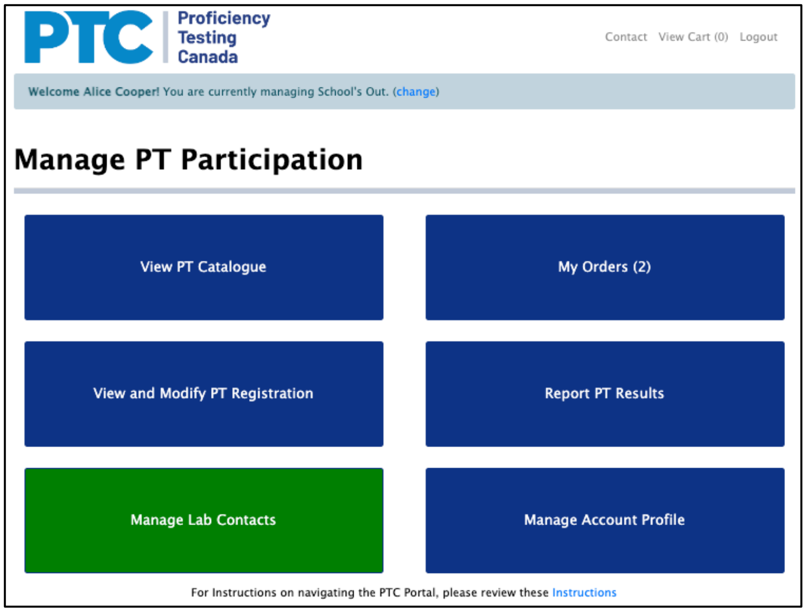
After all of the new registrations have been added to the cart you can submit them for official registration and participation by selecting the View Cart option at the top of any page. This will open a page detailing all of the items in the cart.

The options available are:

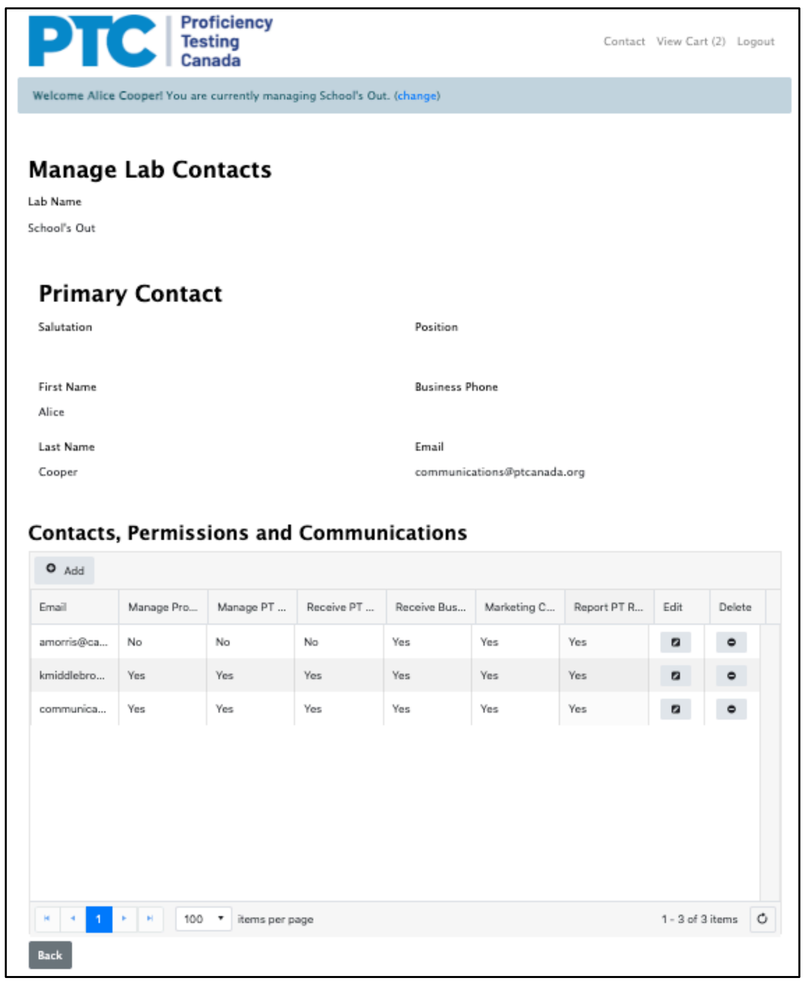
- Delete: Selecting this will delete the item from the cart.
- Checkout: Selecting this will submit all items in the Cart for inclusion in future PT rounds.



2.2 MANAGE LAB CONTACTS

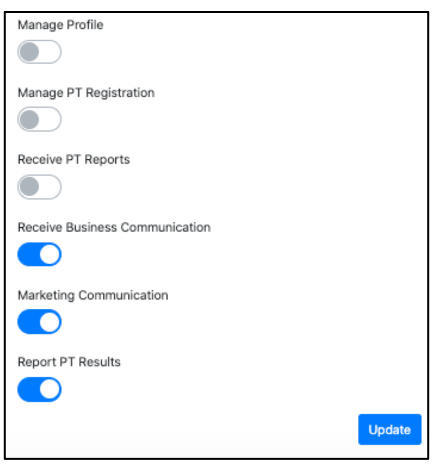


The primary contact can add individuals to the laboratory profile and assign various privileges accordingly. After selecting Manage Lab Contacts from the main Portal page, the Manage Lab Contacts page will open.

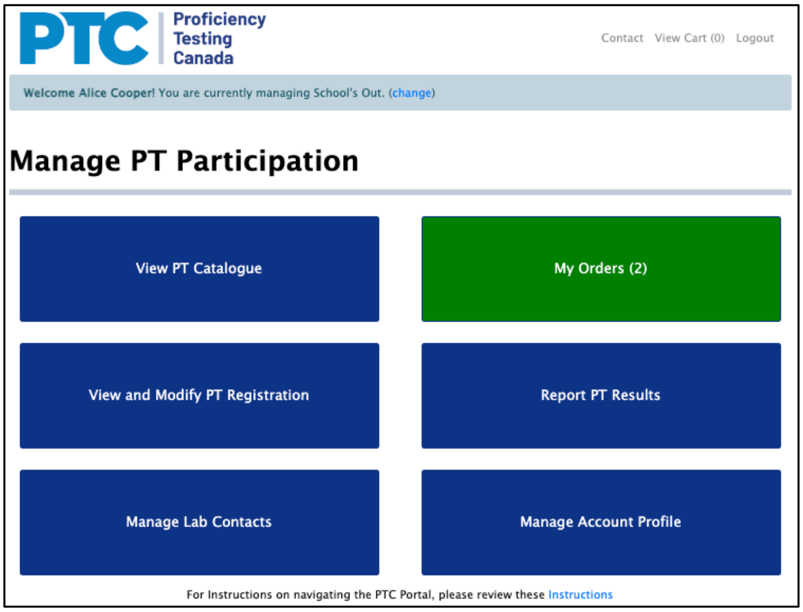


On this page there are three options available:

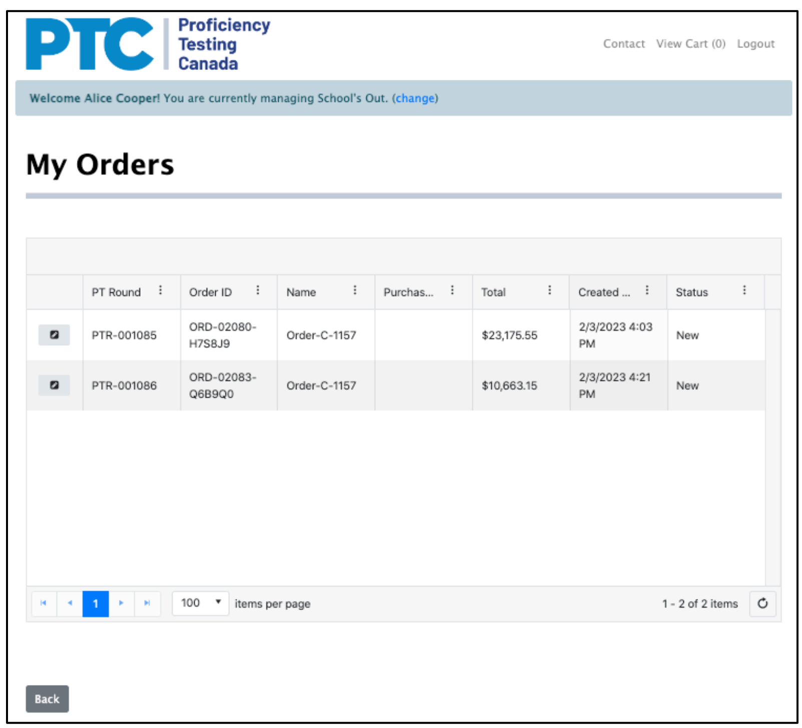
- Delete: This will delete the individual as a contact for the organization.
- Add: This will open a window where you can enter the information about the new contact. When a new contact is added, an email will be sent to that individual to set their password.
- Edit: This will open a view with toggles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



2.3 MY ORDERS



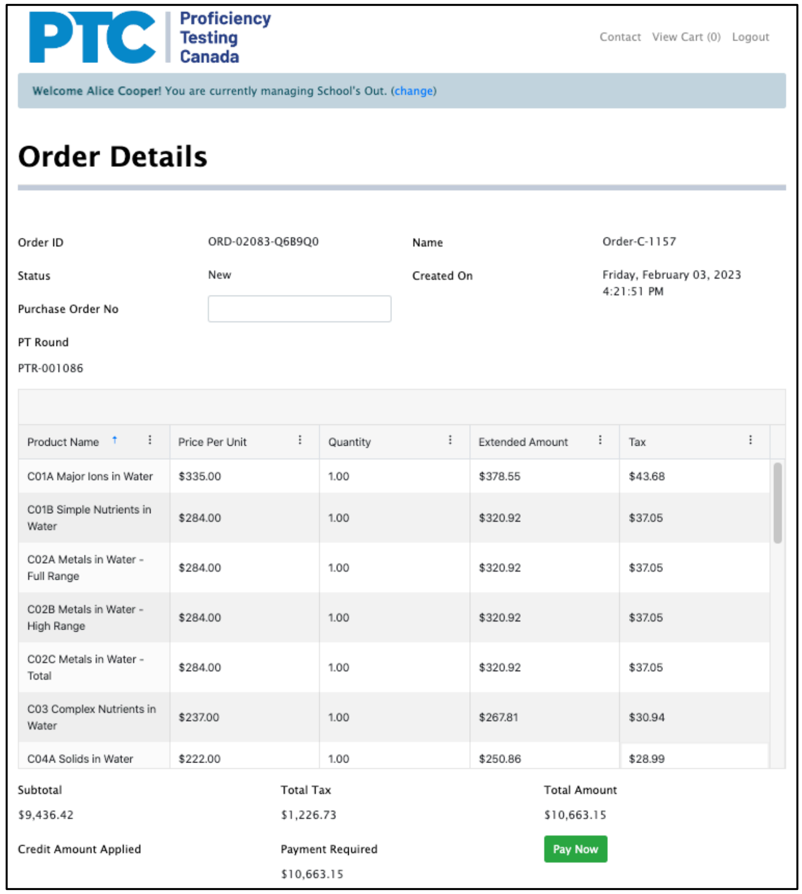
If there is a number beside the My Orders option on the main Portal page, there is one or more unpaid order. Each order typically applies to a single PT round and is available for review and payment eight weeks before the shipping date for a PT round. Selecting My Orders will open a page detailing the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



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Contact View Cart (0) Logout

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

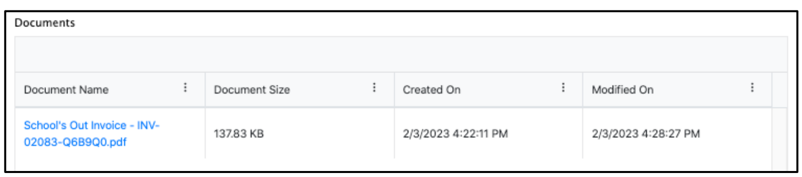
Order Details

Order ID	ORD-02083-Q6B9Q0	Name	Order-C-1157
Status	New	Created On	Friday, February 03, 2023 4:21:51 PM
Purchase Order No			
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

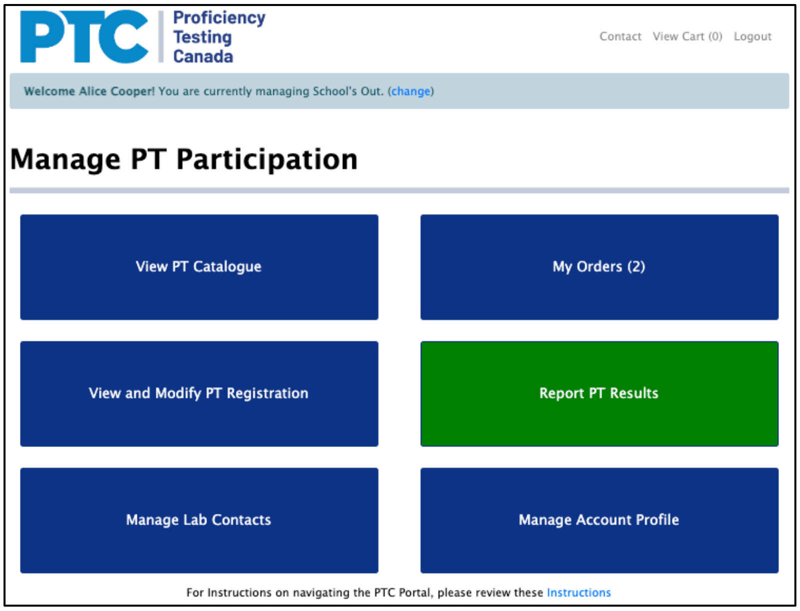
Subtotal	Total Tax	Total Amount
$9,436.42	$1,226.73	$10,663.15
Credit Amount Applied	Payment Required	Pay Now
	$10,663.15	



Documents

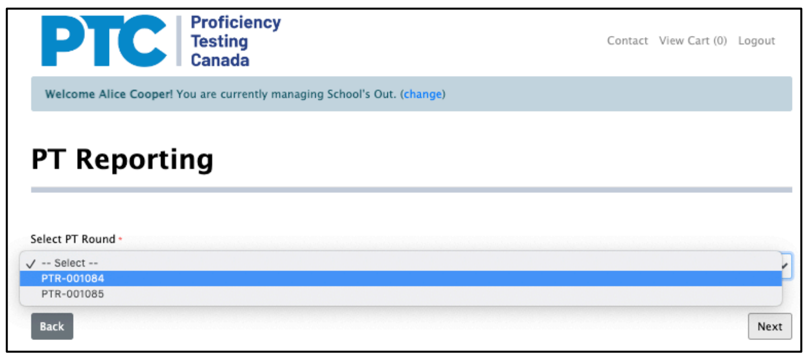
Document Name	Document Size	Created On	Modified On
School's Out Invoice - INV-02083-Q6B9Q0.pdf	137.83 KB	2/3/2023 4:22:11 PM	2/3/2023 4:28:27 PM

2.4 REPORT PT RESULTS

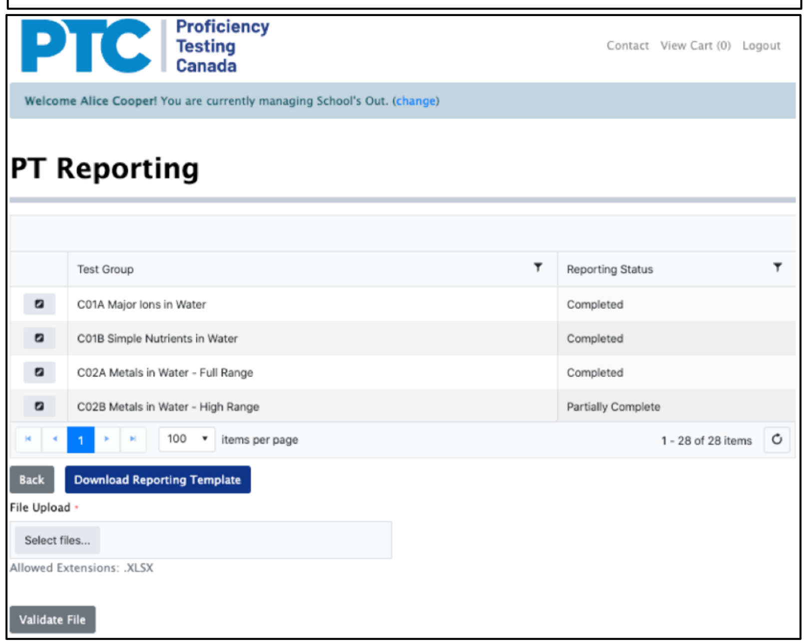


2.4.1 Manual Reporting

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.



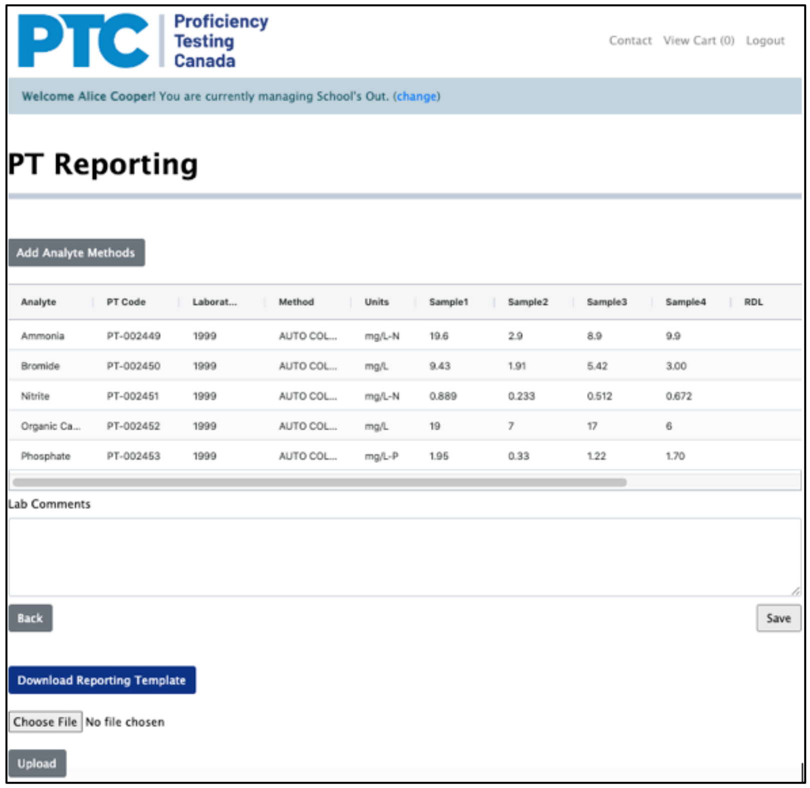
Selecting the PT round will open a page containing all of the Test Groups that your lab can report results for in the selected PT round.



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.

Changes can be made up until the reporting deadline.



2.4.2 Reporting Using an EXCEL Template

An alternative to the manual reporting described above is the use of a downloaded 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.

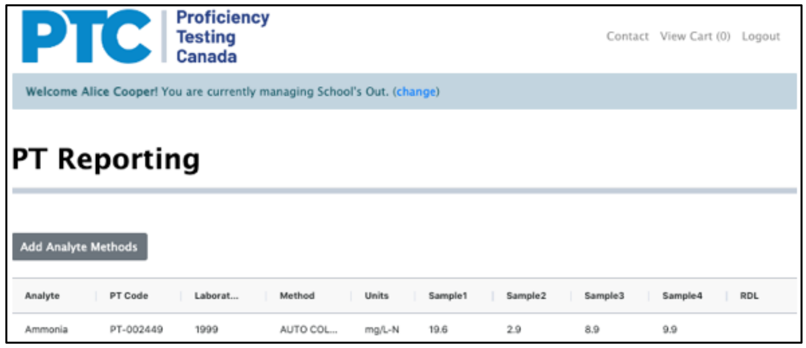
To download a template, select the Download Reporting Template button. Enter the results and date of analysis (mm/dd/yyy). Save the file and then upload it to the Portal by using the Choose File button. Part of the upload includes a validation check to ensure that all information has been entered correctly. 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						

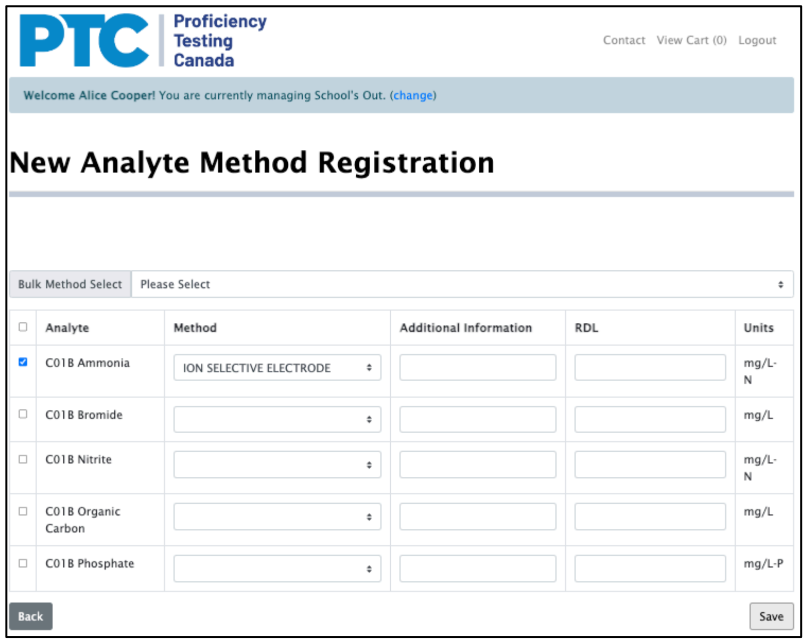
After a brief processing interval, the reported results will appear in the manual reporting grid.

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

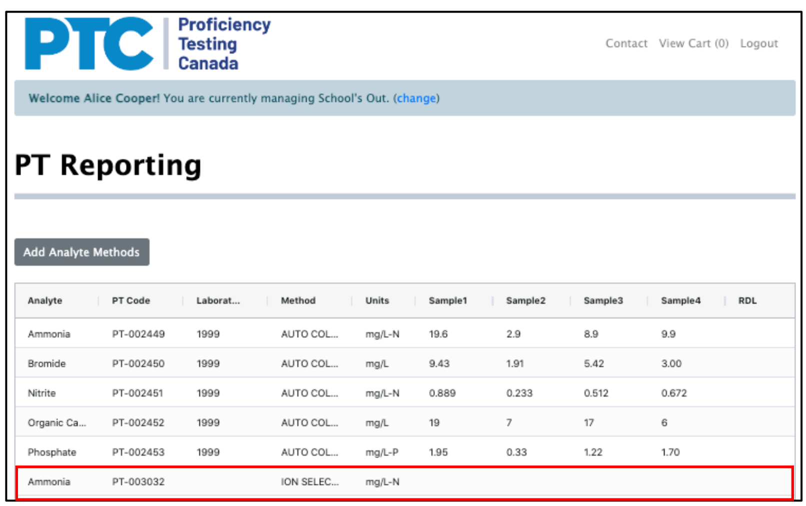
If you have received samples for a Test Group you can report additional results by pressing the Add Analyte/Methods button from the Test Group manual reporting grid.



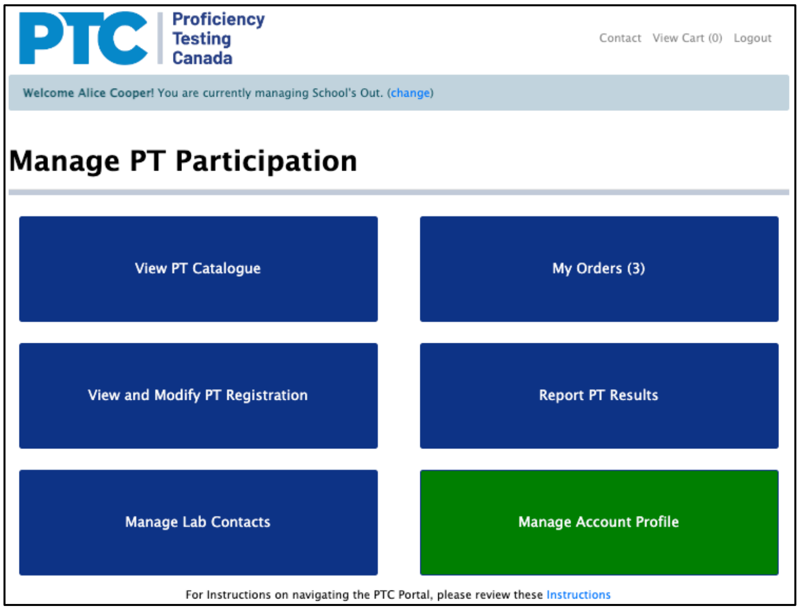
This will open a registration page. Select the analyte(s) that you want to report results for, select a Method from the drop-down list and select the Save button.



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



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.