

PTC Customer Portal Overview

February 16, 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.
- [Login](#): This button will take you to the Lab Management page

The screenshot shows the login page for PTC Proficiency Testing Canada. At the top left is the PTC logo, and at the top right is a 'Contact' link. Below the logo 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 input. 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 'Not registered yet? Register now'.

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.

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

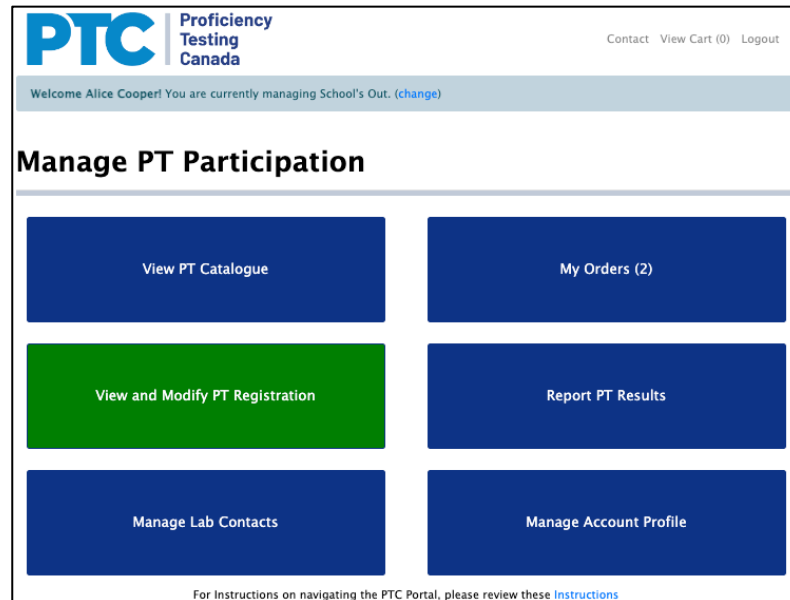
2.0 Main Portal Page

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 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.

The screenshot shows the 'Manage PT Registration' page. It features a table with columns: Test Group, Test Group, Schedule, Member Fee, Non Memb..., Registered, and Action. The table lists five test groups (C01A, C01B, C02A, C02B, C02C) with their respective details. The 'Registered' column shows 'Y' for all listed groups. The 'Action' column contains links for 'Modify' and 'Delete' for each group. A pagination bar at the bottom indicates '1 - 60 of 60 items' and '100 items per page'. A 'Back' button and an 'Add PT' button are also visible.

Test Group ...	Test Group	Schedule	Member Fee	Non Memb...	Registered	Action
C01A	C01A Major Ions in Water	Mar/Oct	\$258.00	\$335.00	Y	Modify Delete
C01B	C01B Simple Nutrients in Water	Mar/Oct	\$217.00	\$284.00	Y	Modify Delete
C02A	C02A Metals in Water - Full Range	Mar/Oct	\$217.00	\$284.00	Y	Modify Delete
C02B	C02B Metals in Water - High Range	Mar/Oct	\$217.00	\$284.00	Y	Modify Delete
C02C	C02C Metals in	Mar/Oct	\$217.00	\$284.00	Y	Modify Delete

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.

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Modify PT Registration

C01B Simple Nutrients in Water

Next Scheduled Shipment: Sunday, October 15, 2023

Schedule: Mar/Oct

Number Of Sample Sets: 1

☒ Save changes

PT Code	Analyte	Method	Addition Inf...	RDL	Units	Delete
PT-002450	Bromide	AUTO COLOR	1999		mg/L	Delete
PT-002451	Nitrite	AUTO COLOR	1999		mg/L-N	Delete
PT-002453	Phosphate	AUTO COLOR	1999		mg/L-P	Delete
PT-002449	Ammonia	AUTO COLOR	1999		mg/L-N	Delete
PT-002452	Organic Carbon	AUTO COLOR	1999		mg/L	Delete

1 - 5 of 5 items

[Back](#) [Save](#)

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.

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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.
- [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.

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

New PT Registration

Number Of Sample Sets: 1 Schedule: Mar/Oct

Bulk Method Select: AUTO COLOR

Analyte	Method	Additional Information	RDL	Units
<input checked="" type="checkbox"/> C03 Total Kjeldahl Nitrogen	AUTO COLOR	SOP 123	0.01	mg/L
<input checked="" type="checkbox"/> C03 Total Phosphorus	AUTO COLOR	SOP 321	0.005	mg/L

[Back](#) [Add to Cart](#)

PTC Proficiency Testing Canada

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[Contact](#) [View Cart \(2\)](#) [Logout](#)

PTC Proficiency Testing Canada

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

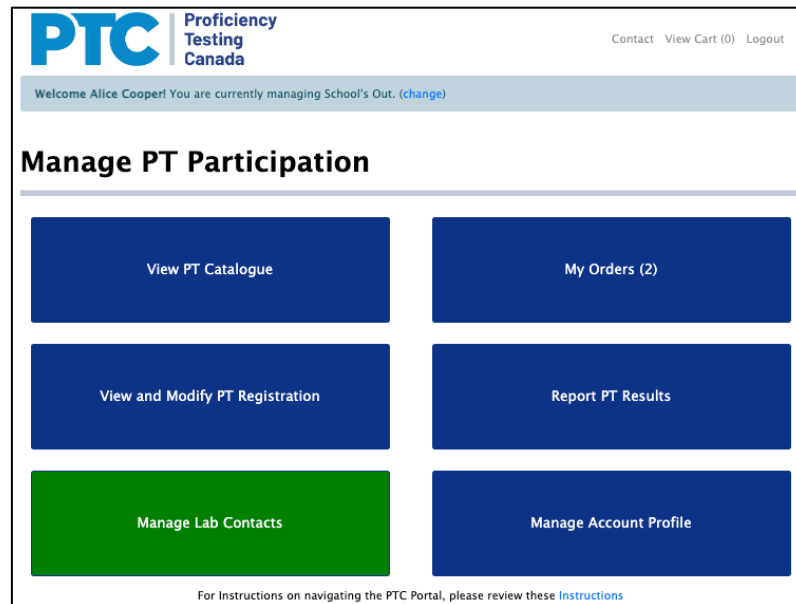
New PT Cart

Test G...	PT Co...	Analyte	Method	Additi...	RDL	Quanti...	Sched...	Delete
C03 Complex Nutrients in Water	PT-003030	Total Kjeldahl Nitrogen	AUTO COLOR	SOP 123	0.01	1	Mar/Oct	Delete
C03 Complex Nutrients in Water	PT-003031	Total Phosphorus	AUTO COLOR	SOP 321	0.01	1	Mar/Oct	Delete

1 - 2 of 2 items

[Back](#) [Checkout](#)

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).

Manage Profile

☐

Manage PT Registration

☐

Receive PT Reports

☐

Receive Business Communication

☒

Marketing Communication

☒

Report PT Results

☒

Update

PTC

Proficiency Testing Canada

Contact View Cart (2) Logout

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

Manage Lab Contacts

Lab Name

School's Out

Primary Contact

Salutation

Position

First Name

Alice

Business Phone

Last Name

Cooper

Email

communications@ptcanada.org

Contacts, Permissions and Communications

Add

Email	Manage Pro...	Manage PT ...	Receive PT ...	Receive Bus...	Marketing C...	Report PT R...	Edit	Delete
amorris@ca...	No	No	No	Yes	Yes	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
kmiddlebro...	Yes	Yes	Yes	Yes	Yes	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
communica...	Yes	Yes	Yes	Yes	Yes	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1

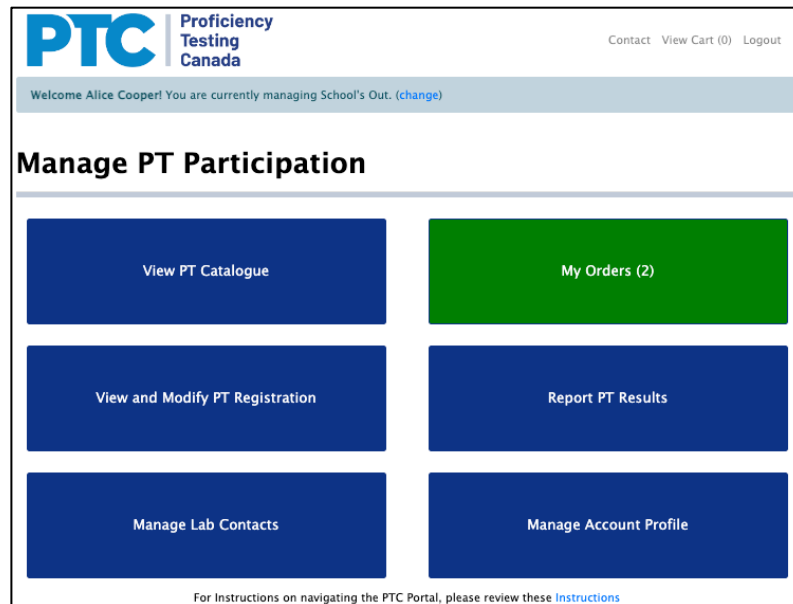
100

items per page

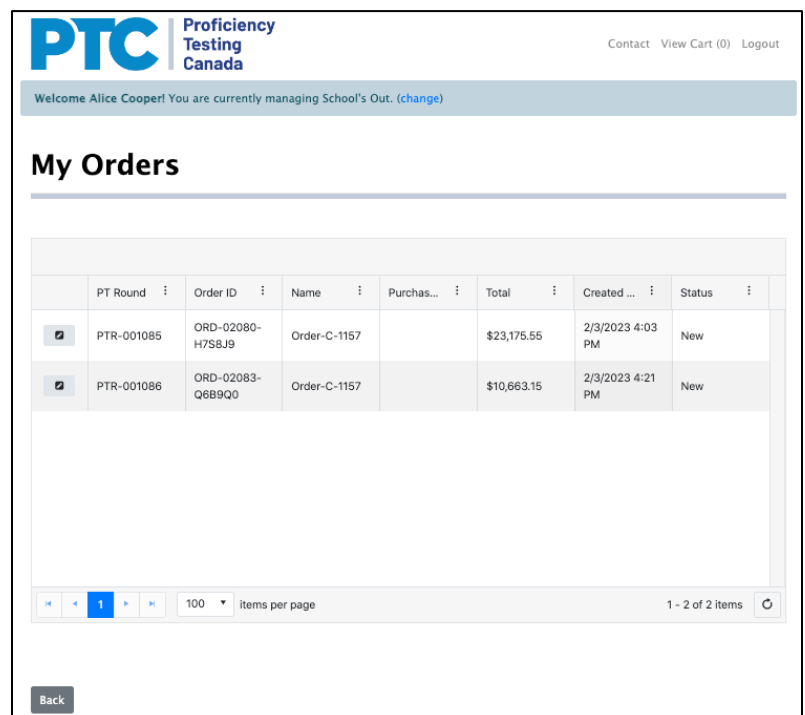
1 - 3 of 3 items

Back

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.


**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

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

\$9,436.42

Total Tax

\$1,226.73

Total Amount

\$10,663.15

Credit Amount Applied

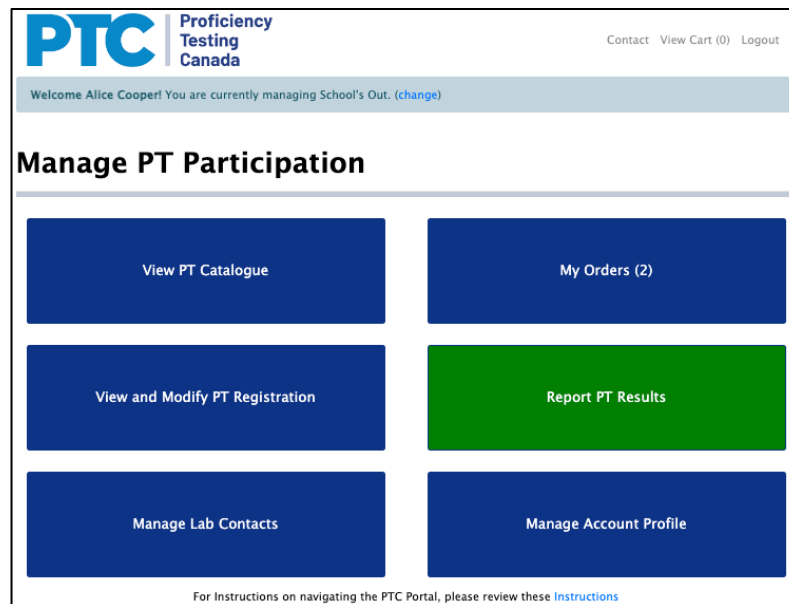
Payment Required

\$10,663.15

[Pay Now](#)

Documents

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.

The screenshot shows the 'PT Reporting' page. At the top, there is a header with the PTC logo and 'Proficiency Testing Canada'. Below the header, a welcome message reads: 'Welcome Alice Cooper! You are currently managing School's Out. (change)'. The main section is titled 'PT Reporting'. Below the title, there is a 'Select PT Round' dropdown menu. The dropdown is open, showing three options: 'PTR-001084' (selected) and 'PTR-001085'. Below the dropdown are 'Back' and 'Next' buttons. Below the dropdown menu, there is a table with two columns: 'Test Group' and 'Reporting Status'. The table contains four rows of data:

Test Group	Reporting Status
C01A Major Ions in Water	Completed
C01B Simple Nutrients in Water	Completed
C02A Metals in Water - Full Range	Completed
C02B Metals in Water - High Range	Partially Complete

Below the table, there is a pagination bar showing '1' of 1 items per page. Below the pagination bar, there is a 'Back' button and a 'Download Reporting Template' button. Below the buttons, there is a 'File Upload' section with a 'Select files...' button and a 'Validate File' button. Below the 'Validate File' button, there is a text label: 'Allowed Extensions: .XLSX'.

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.

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

PT Reporting

[Add Analyte Methods](#)

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	

Lab Comments

[Back](#) [Save](#)

[Download Reporting Template](#)

[Choose File](#) No file chosen

[Upload](#)

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/yyyy). 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.

PTC Proficiency Testing Canada

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

PT Reporting

[Add Analyte Methods](#)

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

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

New Analyte Method Registration

[Bulk Method Select](#) [Please Select](#)

<input type="checkbox"/>	Analyte	Method	Additional Information	RDL	Units
<input checked="" type="checkbox"/>	C018 Ammonia	ION SELECTIVE ELECTRODE			mg/L-N
<input type="checkbox"/>	C018 Bromide				mg/L
<input type="checkbox"/>	C018 Nitrite				mg/L-N
<input type="checkbox"/>	C018 Organic Carbon				mg/L
<input type="checkbox"/>	C018 Phosphate				mg/L-P

[Back](#) [Save](#)

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

PTC Proficiency Testing Canada

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

PT Reporting

[Add Analyte Methods](#)

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 'Manage PT Participation' page of the PTC Customer Portal. The header includes the PTC logo, 'Proficiency Testing Canada', and links for 'Contact', 'View Cart (0)', and 'Logout'. A welcome message for Alice Cooper is displayed. The main content area features 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). A footer note directs users to the 'Instructions' page for navigation help.

PTC Proficiency Testing Canada

Contact View Cart (0) Logout

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

Manage PT Participation

View PT Catalogue

My Orders (3)

View and Modify PT Registration

Report PT Results

Manage Lab Contacts

Manage Account Profile

For Instructions on navigating the PTC Portal, please review these [Instructions](#)

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 'Shipping Information' page of the PTC Customer Portal. The header includes the PTC logo, 'Proficiency Testing Canada', and links for 'Contact' and 'Logout'. A welcome message for Alice Cooper is displayed. The page contains several form fields for company and shipping information, including 'Company Name', 'School's Out', 'Parent Company', 'Ownership Type' (set to 'Private'), 'Attention To' (Alice Cooper), 'Email' (communications@ptcanada.org), 'Address Line 1' (dghdg), 'Address Line 2', 'City' (Ottawa), 'Country' (Canada), 'State/Province' (Ontario), and 'ZIP/Postal Code' (K1C 5V5).

PTC Proficiency Testing Canada

Contact Logout

Welcome Alice Cooper!

Company Name

School's Out

Parent Company

Ownership Type ▾

Private ▾

Shipping Information

Attention To ▾

Alice Cooper

Email ▾

communications@ptcanada.org

Address Line 1 ▾

dghdg

Address Line 2 ▾

City ▾

Ottawa

Country ▾

Canada ▾

State/Province ▾

Ontario ▾

ZIP/Postal Code ▾

K1C 5V5