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1. Where to start

Access the SANBS Proficiency System by clicking on the South-African National Blood Service (SANBS) Proficiency link on your Company Intranet page or by entering the following URL in your browser: <https://www.sanbs-proficiency.org.za/>



2. What are the costs

As an external institution, you can view the SANBS Proficiency Test price list by clicking on the Price List tab at the top of the webpage.

3. How to gain access to the system

3.1. As a Supervisor or Manager (Primary Participant) of a Laboratory or External Institution you need to **REGISTER A NEW INSTITUTION** on the system.

Note!! The supervisor or manager will be responsible to - enrol for the relevant Proficiency/ies:

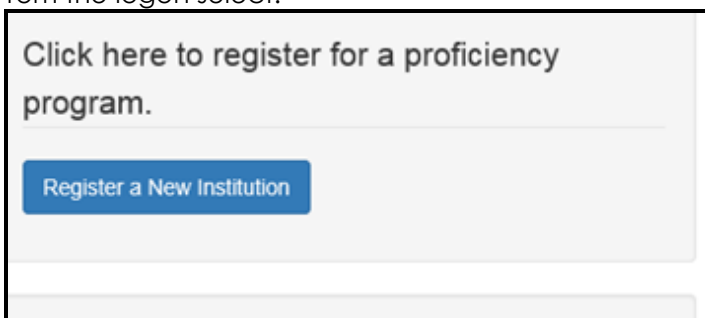
- Add/remove participants.
- Manage Instrument (where applicable).

3.2. SANBS Proficiency Department will approve/reject your registration.

3.3. You will then receive an email with a link to logon to the system or an email explaining why your registration was rejected.

4. Register an Institution

a. From the logon select:



Please note! All prompts marked with an is a required prompt. Please complete all prompts in Title Case e.g. Proficiency

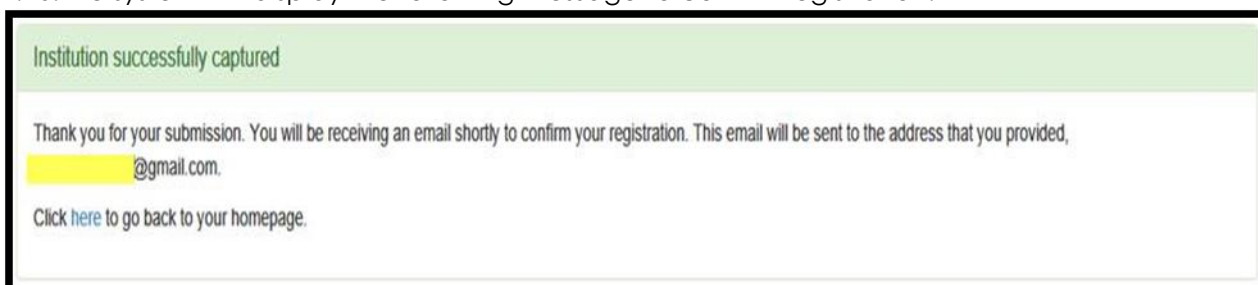
b. At the Institution Name prompt enter the name of the blood bank, donor clinic or external entity e.g. Milpark Blood Bank, Beacon Donor Centre, Kimberley NHLS etc.

4.1. At the **Organization** prompt select the organization the institution forms part of e.g. SANBS, NHLS etc.

- 4.2. Complete the institution **telephone** and **fax** details at the associated prompts.
Note: The format for S.A contact numbers are 10 numbers without spaces e.g. 0117610000. For international numbers please enter the number in the international format e.g. +27117610000.
- 4.3. At the **Company Email** prompt please ensure the lab supervisor or lab manager (Primary Participant) email address is entered; the email address will be used in all communication.
- 4.4. Please enter the physical address of the institution at the **Physical Address** prompts.
Note: This address will be used to deliver all the proficiency samples.
- 4.5. **Primary Participant Details** are the details of the lab supervisor or lab manager, the person's details entered at these prompts will be able to:
- Manage participants.
 - Order proficiencies.
 - Run laboratory reports.
 - Manage instruments.
- 4.6. Enter the **name, surname** and **email address** of the primary participant at the associated prompts.
Note: The primary participants email address and Institution email address must be the same.
Secondary Participant Details are the details of a participant that is second charge of the lab, or assist if Primary Participant is not available. The person details entered at these prompts will be able to:
- Manage participants.
 - Run Laboratory reports
- Note: The secondary participant is not required if this Institute only has one staff member**
- 4.7. Enter the **name, surname** and **email address** for the secondary participant at the associated prompts.
- 4.8. The next section **Billing Details** are for all external participants that are not part of SANBS. Tick the **"I am a SANBS Institution"** box if part of SANBS. This will remove the * from all required prompts for the billing details.
- 4.9. All external institutions not part of SANBS **must** complete the **Billing Detail** prompts.
Note: The details entered must be that of the guarantor responsible for billing/payments.
- 4.10. Once all the **Guarantor** prompts have been completed or the **I am a SANBS Institution** box has been ticked the Terms and Conditions can be viewed by clicking on the Terms and Conditions link:



- 4.11. Click on the box next to the **"I agree to the Terms and Conditions"** prompt to continue.
- 4.12. If all the required prompts have been completed the **"Register And Order"** and the **"Register Only"** buttons will change to active buttons.
- 4.13. If required prompts are still missing the **"Register And Order"** and the **"Register Only"** button will remain inactive until all the required prompts has been completed.
- 4.14. Internal participants click on the "Register And Order" prompt to complete registration of the new Institution. The system will display the following message to confirm registration.
- 4.15. An External Participant that required additional information should select "Register Only".
- 4.16. The system will display the following message to confirm registration:



Institution

Please fill in your institution's details to register a new institution. Your details will be reviewed by a member of SANBS, and you will be notified by email if your institution has been accepted into the proficiency program.

Fields marked with an * are required.

Institution Details

Institution Name

Bruma Blood Bank

Organization

SANBS

Telephone

0117641234

Fax

0117641254

Company Email

cheryl.beukes@sanbs.org.za

Primary Participant Details

First Name

Cheral

Surname

Beukes

Email

cheral.beukes@sanbs.org.za

Secondary Participant Details

First Name

Stanley

Surname

Poongavanum

Email

stanley.poongavanum@sanbs.org.za

Physical Address

Please be aware that this the address to which samples required for proficiency tests will be delivered.

Address Line 1

21 Berkley Ave

Address Line 2

Suburb

Bruma

Country

South Africa

Address Code

1451

Billing Details

I am a SANBS institution.

Invoices will be sent to the guarantor using the email address provided below.

Guarantor Name

Guarantor Email

Address Line 1

Address Line 2

Suburb

Country

Choose Country

Address Code


I agree to the [Terms and Conditions](#)

Register And Order

Register Only

A SANAS Accredited Proficiency Testing Scheme Provider, NO PTS0006

Example of an External Institution:

 Institution

Please fill in your institution's details to register a new institution. Your details will be reviewed by a member of SANBS, and you will be notified by email if your institution has been accepted into the proficiency program.

Fields marked with an * are required.

Institution Details

Institution Name	Organization	
<input type="text" value="Bruma MHLS"/>	<input type="text" value="NHLS"/>	
Telephone	Fax	Company Email
<input type="text" value="0117641234"/>	<input type="text" value="0117641254"/>	<input type="text" value="cheryl.beukes@nhls.org.za"/>

Physical Address

Please be aware that this the address to which samples required for proficiency tests will be delivered.

Address Line 1	Address Line 2	Suburb
<input type="text" value="21 Berkley Ave"/>	<input type="text"/>	<input type="text" value="Bruma"/>
Country	Address Code	
<input type="text" value="South Africa"/>	<input type="text" value="1451"/>	

Primary Participant Details

First Name	Surname	Email
<input type="text" value="Cheryl"/>	<input type="text" value="Beukes"/>	<input type="text" value="cheryl.beukes@nhls.org.za"/>

Secondary Participant Details

First Name	Surname	Email
<input type="text" value="Stanley"/>	<input type="text" value="Poongavanum"/>	<input type="text" value="stanley.poongavanum@nhls.org.za"/>

Billing Details

I am a SANBS institution.

Invoices will be sent to the guarantor using the email address provided below.

Guarantor Name	Guarantor Email	
<input type="text" value="Petro Mabuye"/>	<input type="text" value="petro.mabyue@nhls.org.za"/>	
Address Line 1	Address Line 2	Suburb
<input type="text" value="P O Box 1414"/>	<input type="text" value="Bruma"/>	<input type="text" value="Boksburg"/>
Country	Address Code	
<input type="text" value="South Africa"/>	<input type="text" value="1454"/>	

I agree to the [Terms and Conditions](#)

A SANAS Accredited Proficiency Testing Scheme Provider, NO PTS0006

What do I do next?

The SANBS Quality Department will review all requests for the registration of a new Institution. The new Institution will then either be approved or rejected by the SANBS Quality Department.

5. Approved Institution:

- 5.1. The primary participant will receive an email stating that the Institution registration has been approved with a link to complete registration.

INF-QCL-015

1043876 REV 7 (??/??/??)

SANBS Official Email

You have been invited to join the SANBS proficiency program. Click on the link below to begin the enrolment process. <http://sanbs.entelectprojects.co.za/Participant/Register?Guid=f06f24ce-0c26-4673-8d49-730191dcec45>

- 5.2. Click on the link to enter logon credentials for SANBS Proficiency system.
- 5.3. The user will be re-directed to the Participant page.
 - a. The **First Name**, **Surname** and **Email** address will default in as entered when the institution was registered. Please confirm that these details are correct and make the relevant corrections if necessary.
 - b. At the **Password** prompt enter a password for the SANBS Proficiency System please take note of the password rules:

Password creation instructions:

Your Password must contain:

- 8-20 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number

- c. At the **Confirm Password** prompt, re-enter the password.
- d. **Contact Details** can be completed but are not required, as all communication will be conducted via email.
- e. Click on **Register** to complete participant registration.

Register

Example of a Participant Registration Screen:

Participant

Fields marked with an * are required.

User Details

First Name Joseph	Surname Beatrix
Email renetha.b+777@gmail.com	

Password creation instructions:

Your Password must contain:

- 8-20 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number

Password *****	Confirm Password *****
-------------------	---------------------------

Contact Details

Mobile Number 0821111234	Telephone Number 0117819000
Address Line 1 34 Rose Street	Address Line 2
Suburb Florida	Country South Africa
Address Code 1754	

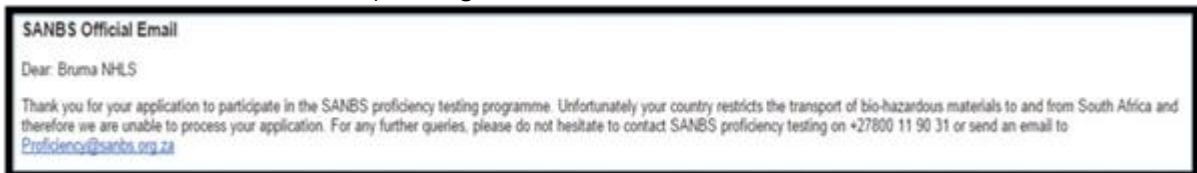
Register

Note: The system will display a message that the user has been successfully registered and may sign into the system.



6. Rejected Institutions

- 6.1. The primary participant will receive an email stating that the Institution registration has been rejected with the reason for rejection. The SANBS Quality Department can be contacted on the number listed in the email for any queries.
- 6.2. Possible reasons for being rejected:
 - a. Duplicate Institution registration.
 - b. Couriers do not deliver in the area.
 - c. Incorrect data entered upon registration.



7. Participants Management

- a. As a Primary or Secondary Participant (Laboratory/ Clinic/ Blood Bank Supervisor of Manager) you will be able to manage the participants (staff) of your Institution.
- b. All participants which will complete proficiencies online, needs to be registered on the system. Each participant will be allocated a participant number and will have to capture their own login credentials.

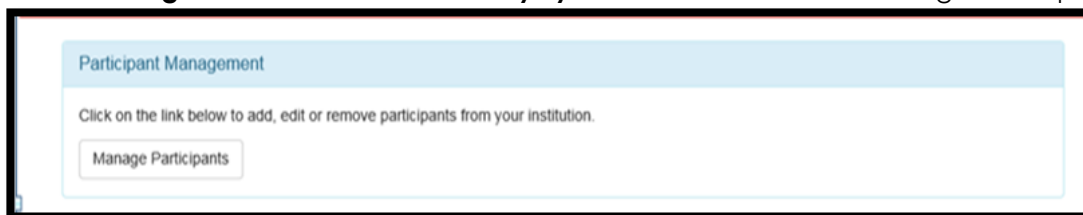
Note: The participant number is used throughout the system e.g. when completing proficiencies and generating reports. The system will only display the participant number on emails, results and reports and not the participant name.

Steps to follow:

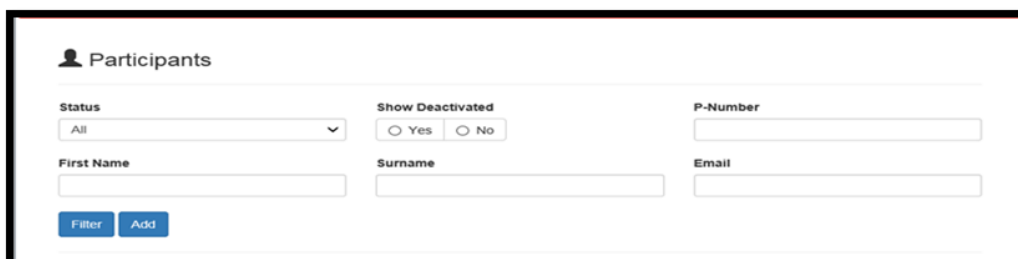
- c. Supervisor / Manager adds participant.
- d. Participant receives email with a link to complete registration.
- e. Participant completes registration online by entering logon credentials.

7.1. Add Participants:

7.1.1. **Logon to the SANBS Proficiency System and click on the Manage Participants button.**



7.1.2. Participants can be viewed, added or inactivated from this page. To add a participants click on the **Add** button.



- 7.1.3. At the **Role** prompt select **Participant** from the list.
- 7.1.4. At the **Email** prompt enter the participant email address. Please ensure the correct email address is entered as the login link will be send to the participant email.
- 7.1.5. Enter the **Name** and **Surname** for the participant at the relevant prompts. Click on the **Add** button to add the participant.

- 7.1.6. The participant will be added to the Participant list, an email will be sent to complete the registration.
- 7.1.7. Click on the link in the email to enter logon credential for the SANBS Proficiency system. The user will be re-directed to the Participant page.
- 7.1.8. The **First Name**, **Surname** and **Email** address will default in as entered when the institution was registered. Please confirm that these details are correct and make the relevant corrections if necessary.
- 7.1.9. At the **Password** prompt enter a password for the SANBS Proficiency System please take note of the password rules:



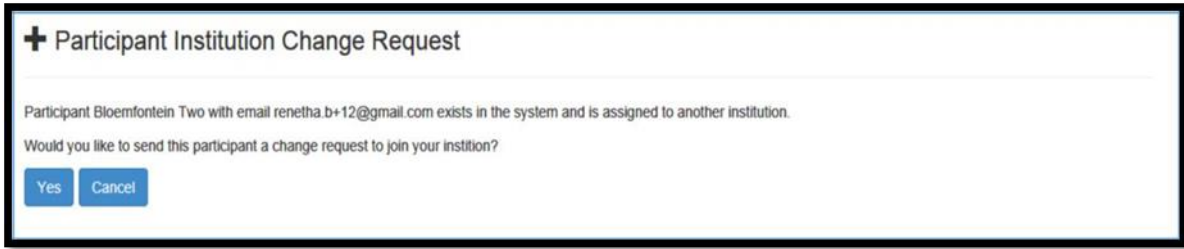
- 7.1.10. At the **Confirm Password** prompt, re-enter the password.
 - **Contact Details** can be completed but are not required, as all communication will be conducted via email.
- 7.1.11. Once the participant has completed registration, the participant status will change from **Invited to Accepted on the Participant list**.

7.2. Relocate Participant

Participants may move from one institution to another in the same organization.

- 7.2.1. **To relocate participant to another institution** the supervisor/manager (Primary participant) of the institution must sign into the system and click on the Manage Participants button.
- 7.2.2. Click on the **Add** button to "add" the participant to the relocated institution.
- 7.2.3. Complete all the prompts as per point 4.1 and ensure the email address entered is the same email address entered when the participant was registered the first time.

7.2.4. Click on the **Add** button to relocate the participant. The system will display a message to enquire if the participant change request can be send. Click on the **Yes** button to send a change request to the participant.



7.2.5. The participant will receive an email with a request to relocate to the new Institution. The email will contain a link to either confirm or reject the change.

7.3. Disable participant

Note: If a participant resigned from the lab/donor centre or will not be performing proficiencies online, the participant status can be changed from Active to Deactivated.

7.3.1. Log to the SANBS **and click on the Manage Participants button.**

7.3.2. Click on the relevant staff member from the participant list.

7.3.3. Click on the Deactivate button to change the status of the participant from Active to Disabled.

7.3.4. The participant status will change to Disabled.

Note: A participant should only be deactivated when they leave the Institution.

8. Proficiency Enrolment (Ordering of Proficiency):

Steps to follow:

- a. Create proficiency order for the following year. Check the distribution dates for the various programs to ensure that orders are placed for the months that it is available.
 - b. SANBS Quality Department will receive the order and approve or reject it.
 - c. Participant will receive an email indicating approval or rejection with relevant rejection rea
- 8.1. From the logon screen, select the Enrolment button.



Proficiencies

Crossmatch

January 10	February 10	March 10	April 10	May 10	June 10
July 10	August 10	September 10	October 10	November 10	December 10
Status: No Order	Total Sets: 120				

8.2. Enter the number of samples needed per month for the whole year, see example below.

Proficiencies

Crossmatch

January 10	February 10	March 10	April 10	May 10	June 10
July 10	August 10	September 10	October 10	November 10	December 10
Status: No Order	Total Sets: 120				

8.3. Only enter a number for the proficiencies that you would like to enrol for and leave the other entries as zero, see example below.

Proficiencies

Crossmatch

January	February	March	April	May	June
10	10	10	10	10	10
July	August	September	October	November	December
10	10	10	10	10	10

Status: No Order Total Sets: 120

Antibody Identification

January	February	March	April	May	June
0	0	0	0	0	0
July	August	September	October	November	December
0	0	0	0	0	0

Status: No Order Total Sets: 0

- 8.4. After you have the number for each proficiency, scroll to the bottom of the screen and click on Save Order.
- 8.5. The system will display all orders entered, ensure that they are correct before clicking on Confirm and Complete.



- 8.6. The SANBS Quality Department will approve or reject the orders for the selected proficiencies. The participant will receive an email confirming the acceptance or rejection of the enrolment. If the rejection is due to a clerical error, the system will allow the participant to edit the order and submit it again.
Note: changes to the enrolment/order can be made only 2 weeks prior to the start of production as outlined in the schedule.
- 8.7. The SANBS Quality Department will approve or reject the orders for the selected proficiencies.
- 8.8. The participants will receive an email confirming the enrolment or rejection of the enrolment. If the rejection is due to a clerical error the system will allow the participant to edit the order and submit it again.
Note: changes to the enrolment/order can be made only 2 weeks prior to the start of production as outlined in the schedule.

Accepted email:

SANBS Official Email

Dear: Institution 1

Congratulations! Your application to join the proficiency Crossmatch has been approved. For any further queries, please do not hesitate to contact SANBS proficiency testing on +27800 11 90 31 or send an email to Proficiency@sanbs.org.za

Rejected email:

SANBS Official Email

Dear: Institution 1

Thank you for your application to join the proficiency Crossmatch. Unfortunately, your application has been rejected for the following reason: InstitutionRejectionReason. For any further queries, please do not hesitate to contact SANBS proficiency testing on +27800 11 90 31 or send an email to Proficiency@sanbs.org.za

9. Enrolment Certificate

9.1. **At the end** the enrolment process the SANBS Proficiency Provider will generate Enrolment Certificates per Institution.

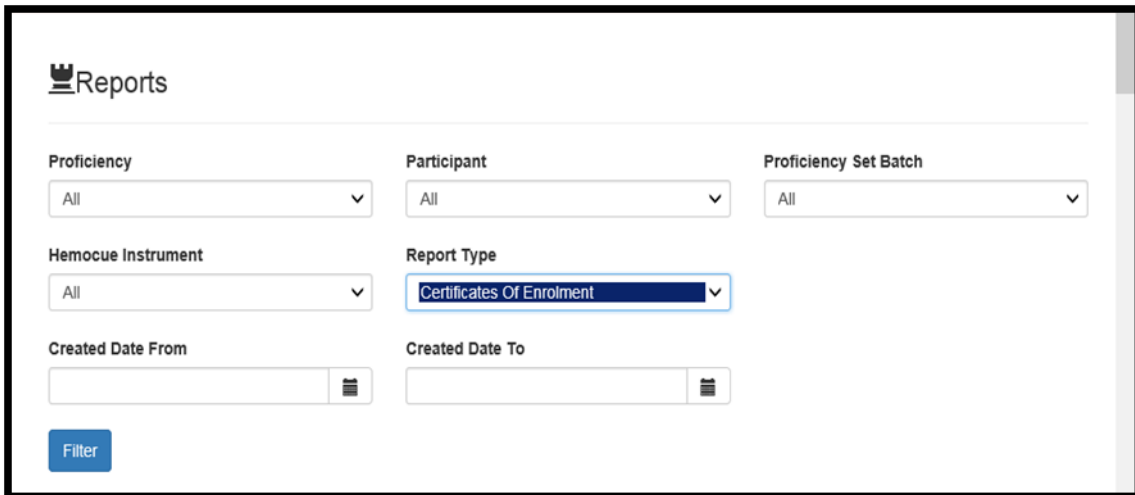
9.2. The institution supervisor/manager will receive an email stating that there is a new report available to view.

Note: The same will apply for participants but they will only be able to see their own report and not that off all the participants at their Institution.

9.3. The supervisor/manger can click on the Reports button on top of the logon screen.



9.4. On "Report Type" option, Choose "Certificate of Enrolment". Click on "Filter".

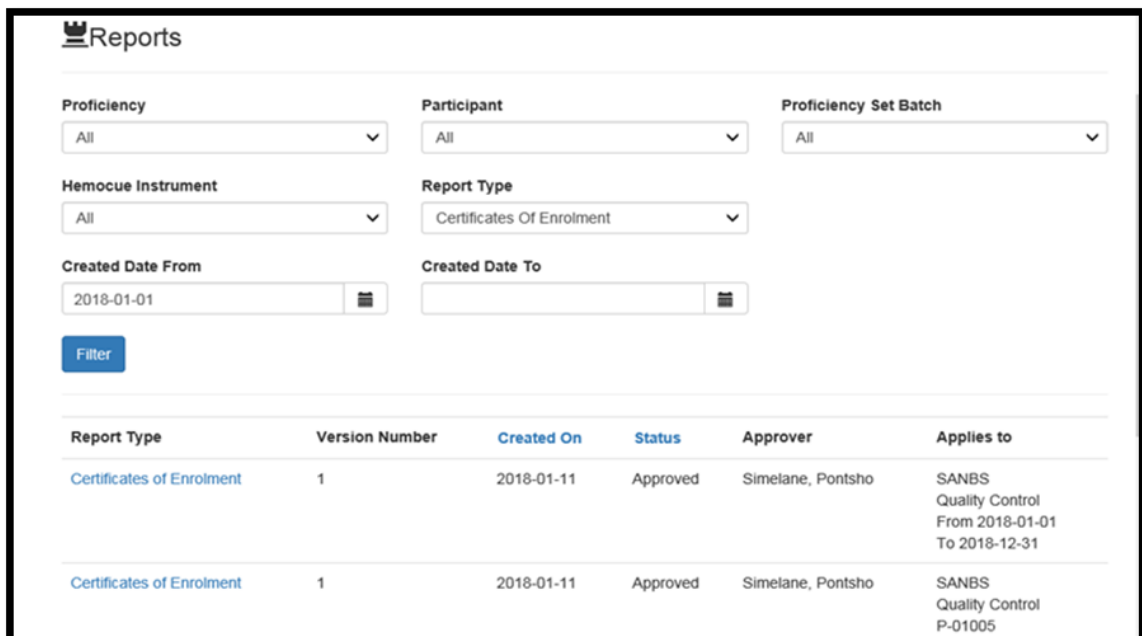


The screenshot shows the 'Reports' filter form with the following fields:

- Proficiency: All
- Participant: All
- Proficiency Set Batch: All
- Hemocue Instrument: All
- Report Type: Certificates Of Enrolment
- Created Date From: (empty)
- Created Date To: (empty)

A blue 'Filter' button is located at the bottom left.

9.5. The supervisor/manager (Primary Participant) will be able to see the Institution Certificate as well as each participant's Certificate of Enrolment in the institution, see example below.



The screenshot shows the 'Reports' table with the following data:

Report Type	Version Number	Created On	Status	Approver	Applies to
Certificates of Enrolment	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Quality Control From 2018-01-01 To 2018-12-31
Certificates of Enrolment	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Quality Control P-01005

9.6. Click on the Certificate required, for example Participant.

The screenshot shows the 'Reports' interface with several filter dropdowns: Proficiency (All), Participant (All), Proficiency Set Batch (All), Hemocue Instrument (All), Report Type (Certificates Of Enrolment), Created Date From (2018-01-01), and Created Date To. A 'Filter' button is present. Below the filters is a table with the following data:

Report Type	Version Number	Created On	Status	Approver	Applies to
Certificates of Enrolment	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Quality Control From 2018-01-01 To 2018-12-31
Certificates of Enrolment	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Quality Control P-01005

9.7. Click onto the “View” button to view the certificates or Click onto the “Download” button to download the Certificate.

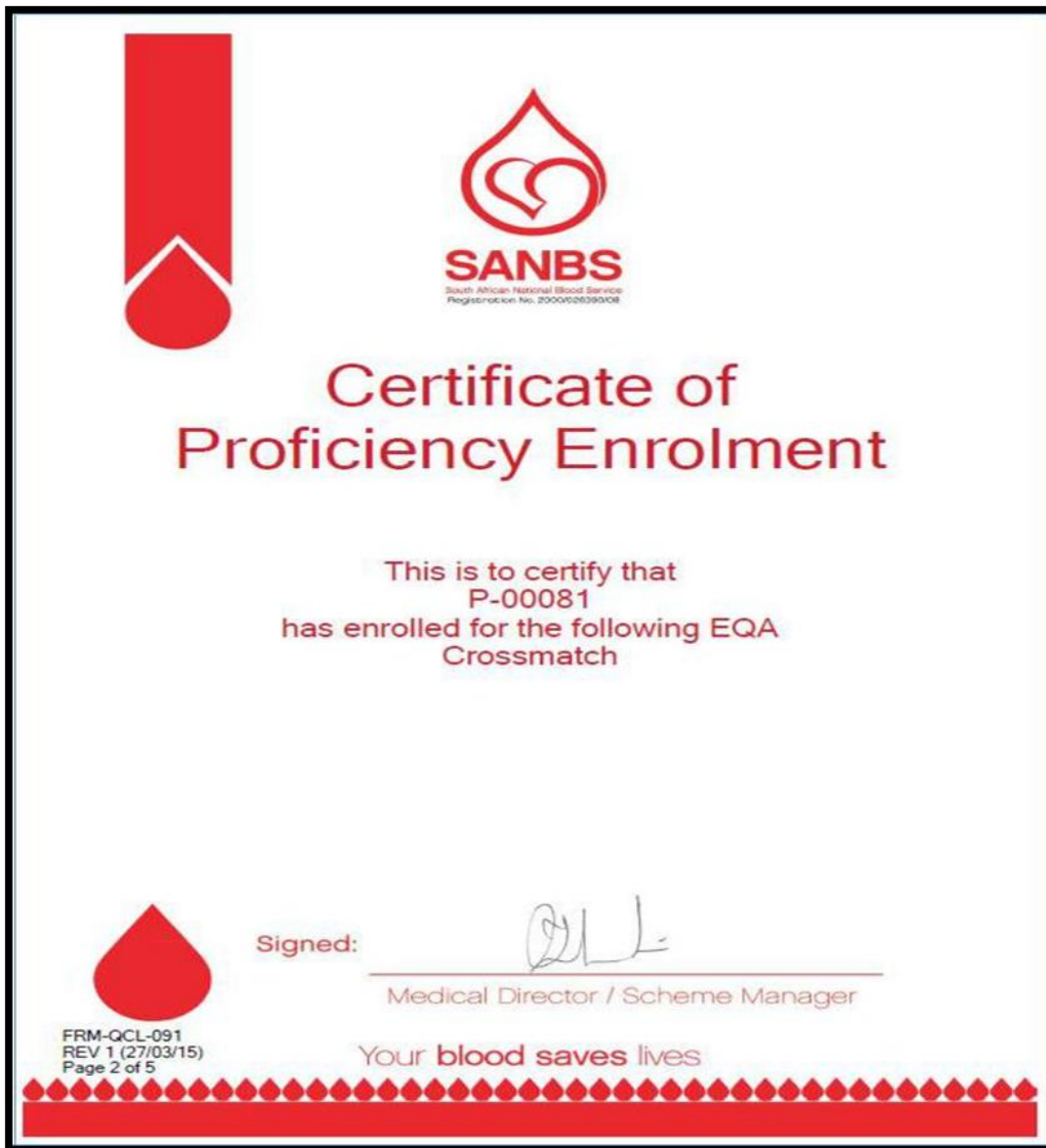
The screenshot shows the 'Certificates of Enrolment Report' details page. It includes a 'Details' section with the following information:

- Report Type: Certificates of Enrolment
- Status: Approved
- Created Date: 2018-01-11
- Approved By: Simelane, Pontsho
- Approved On: 2018-01-16
- Version Number: 1
- Applies To: SANBS Quality Control From 2018-01-01 To 2018-12-31

Below the details are three buttons: 'View', 'Download', and 'Back'. A 'Sub-reports' section at the bottom shows a table with the following data:

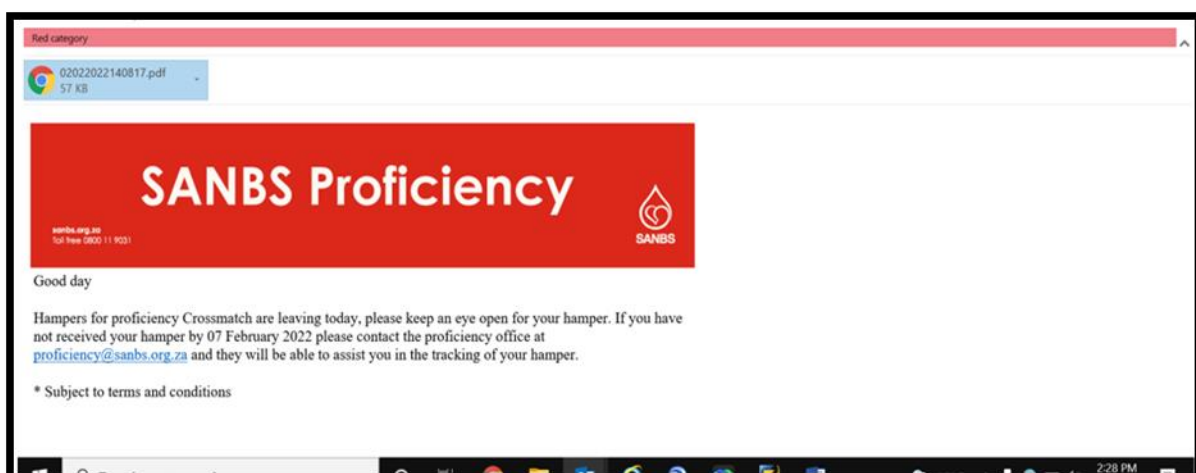
Report Type	Applies to
Certificates of Enrolment	SANBS Quality Control P-01005 From 2018-01-01

9.8. The Certificate can be downloaded to the relevant internet browser or can be printed.

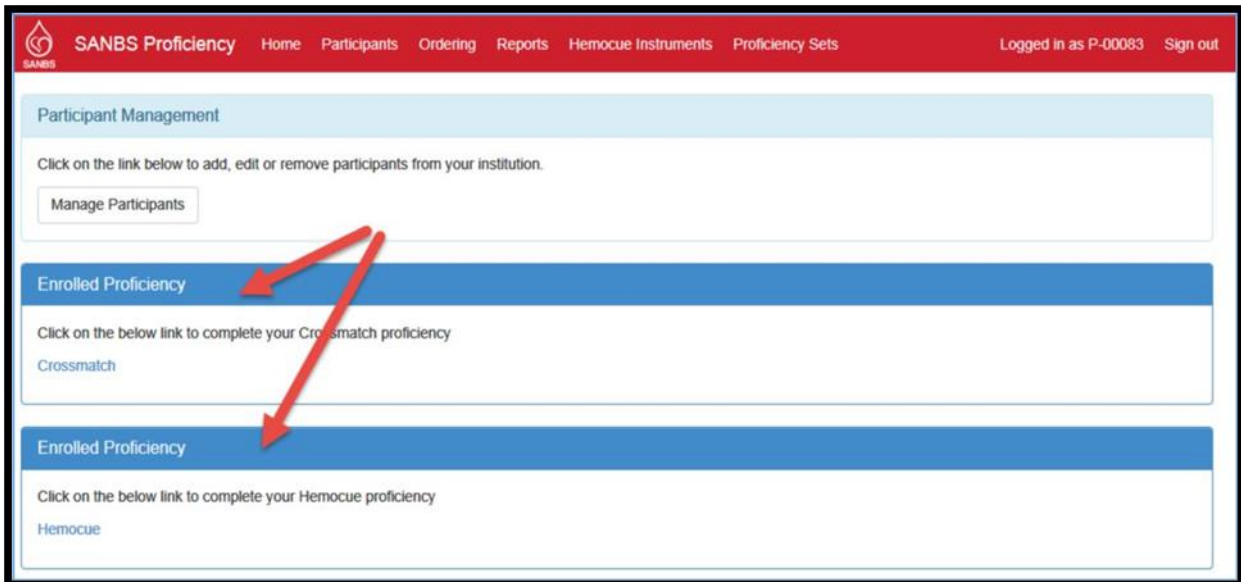


10. Enter Proficiency Results, steps to follow:

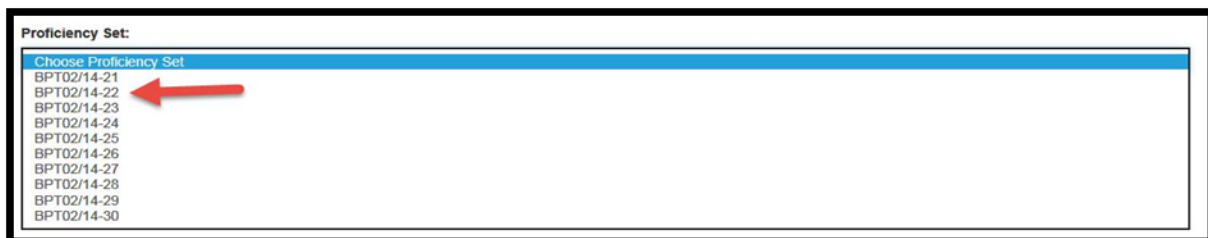
- 10.1. SANBS Proficiency Laboratory, part of the Quality Control Department, will prepare and distribute proficiency samples.
- 10.2. Participants will receive an email indicating that proficiency samples have been distributed.
- 10.3. The Proficiency related Instruction sheet will be distributed to the participants as an attachment to the "Proficiency Set Ready" e-mail sent out.



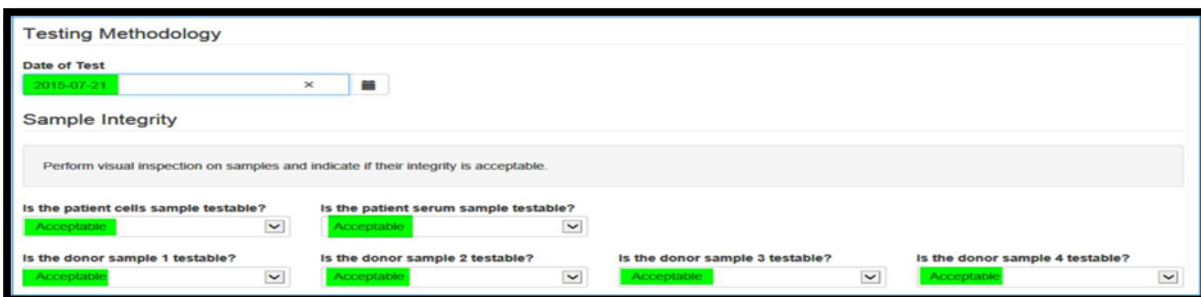
- 10.4. The Proficiency sets have to arrive at the designated site within 5 days of reporting. If the Proficiency test has not arrived within 5 days of the issue date, report to the SANBS Proficiency Laboratory. Participant must complete testing and entering of results of the proficiency samples before the Due date.
- 10.5. After completion, the participant must log onto the system where the relevant proficiency will be displayed in the work list at the logon screen.
- 10.6. The correct proficiency or set number must be selected; results entered on the system and filed before the closing date.
- 10.7. The participant will receive an email confirming the results entered.
- 10.8. Physically complete the proficiency testing and then logon to the system. All available proficiencies will be displayed on the participant work list in the logon screen.
- 10.9. Select the relevant proficiency from the list e.g. Crossmatch.



- 10.10. Select the correct proficiency via batch number or set number from the dropdown list:

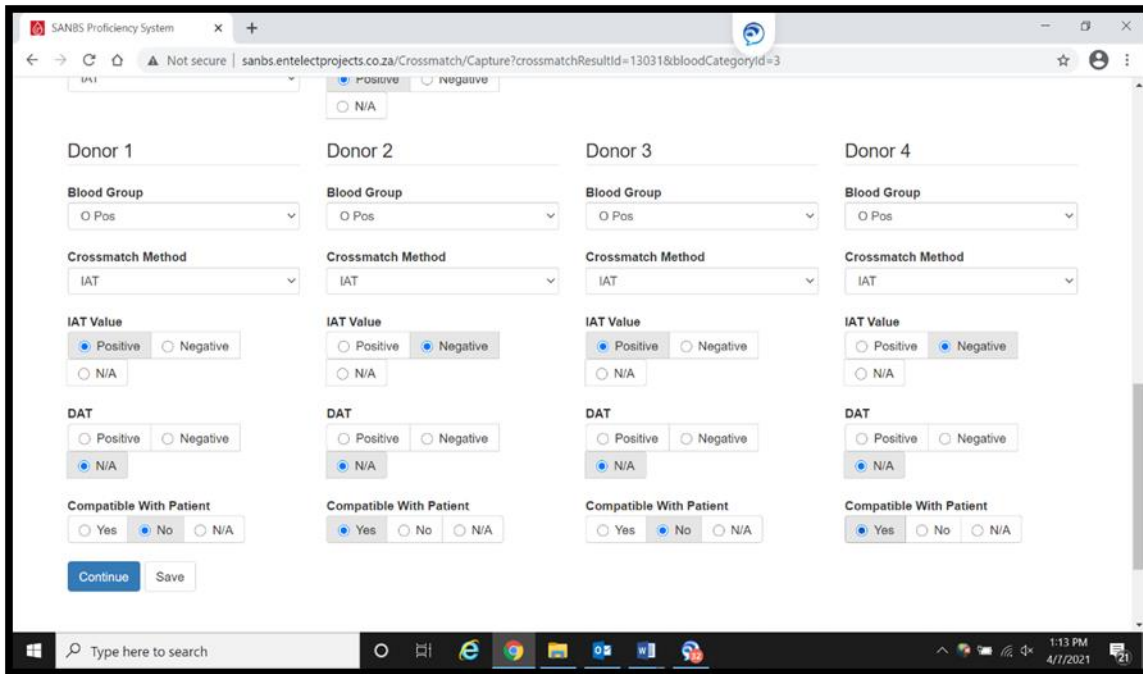


- 10.11. The relevant proficiency details and instructions will be displayed.
- 10.12. Complete all prompts on this page e.g. Date of Test, Sample Integrity etc



- 10.13. After all the relevant prompts have been completed, click on the "Continue" button to move to the result page.
- 10.14. Enter all the results on the result page, once all the results have been entered click on the "Continue" button. If the Continue button is not accessible, e.g. light, blue it indicates that not all the required prompts have been completed. Review the page and complete all the required prompts to continue.

Note: If a test is not performed, select “N/A” in the drop down list for Crossmatch Proficiency.

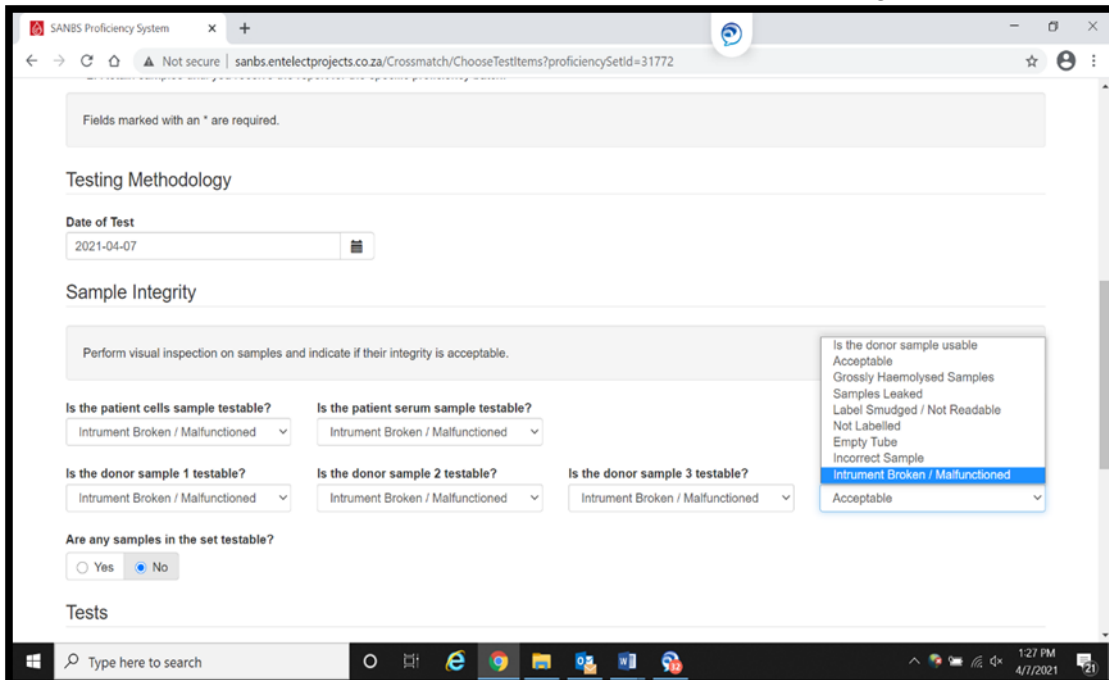


10.15. The system will display a summary page with all the entered results. Ensure that all the results are correct and click on the **“Confirm and Complete Crossmatch”** button. If changes are required, click on the **“Back”** button and make the necessary corrections.

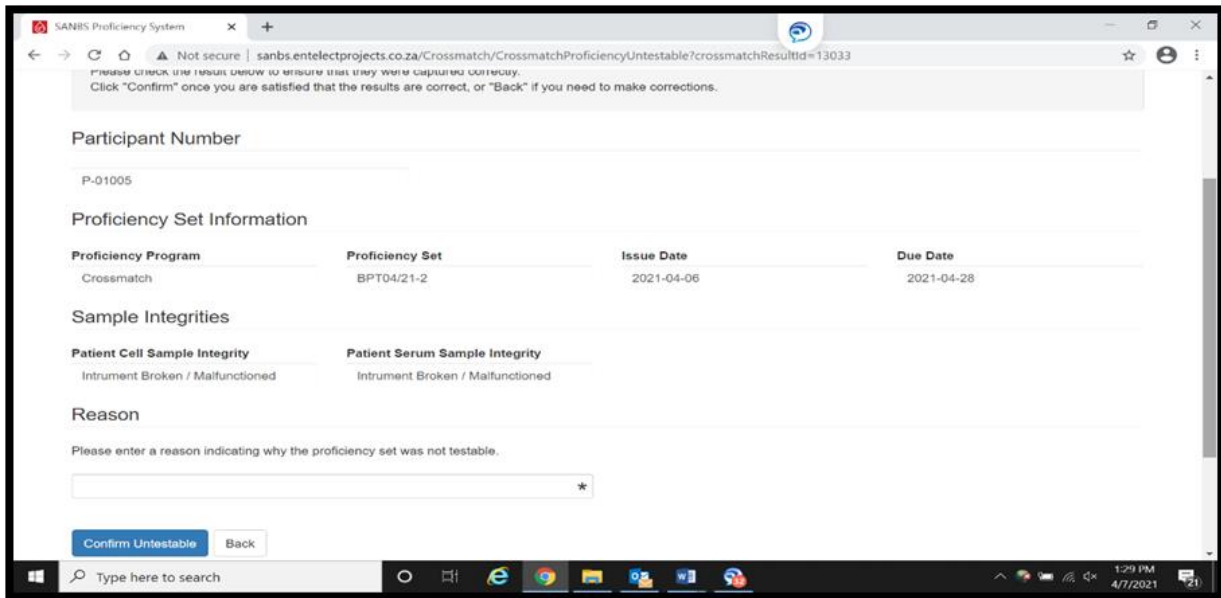
Note: In the event that the instrument “breaks down” or gives an error before testing, during or when testing has started, follow the instructions below:

10.16. Follow 10.1 to 10.10 as when entering results.

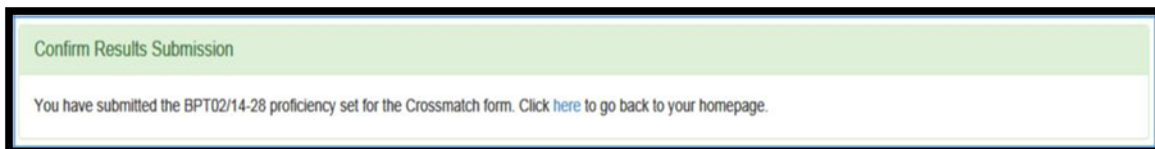
10.17. Select “Instrument/Malfunctioned” under the sample integrity drop down list.



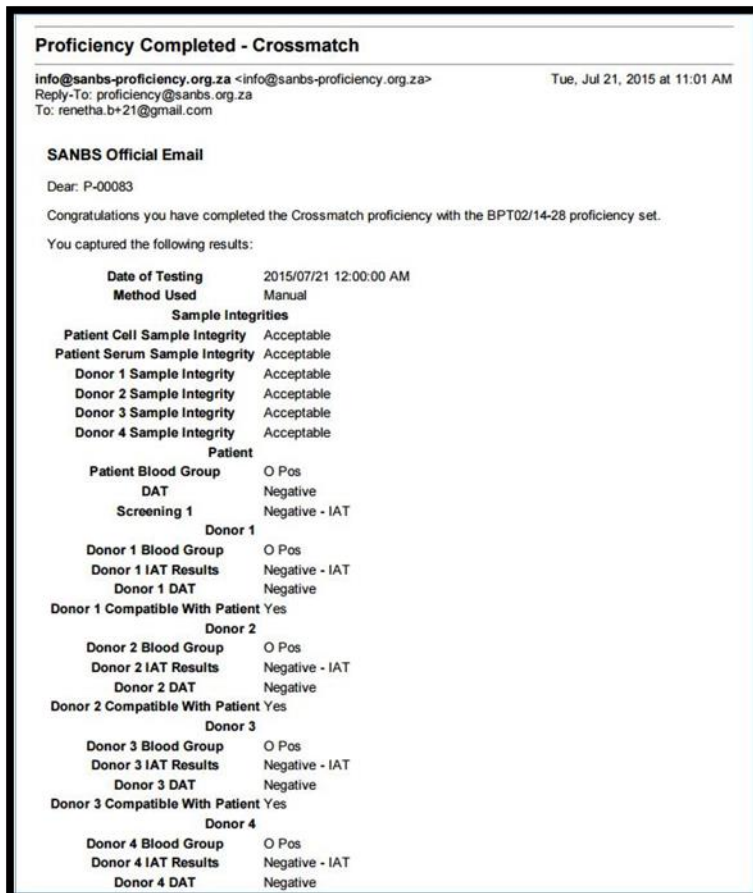
10.18. Click **“Continue”** and the system will prompt a reason to be entered in a field “Please enter a reason indicating why the proficiency set was not testable”.



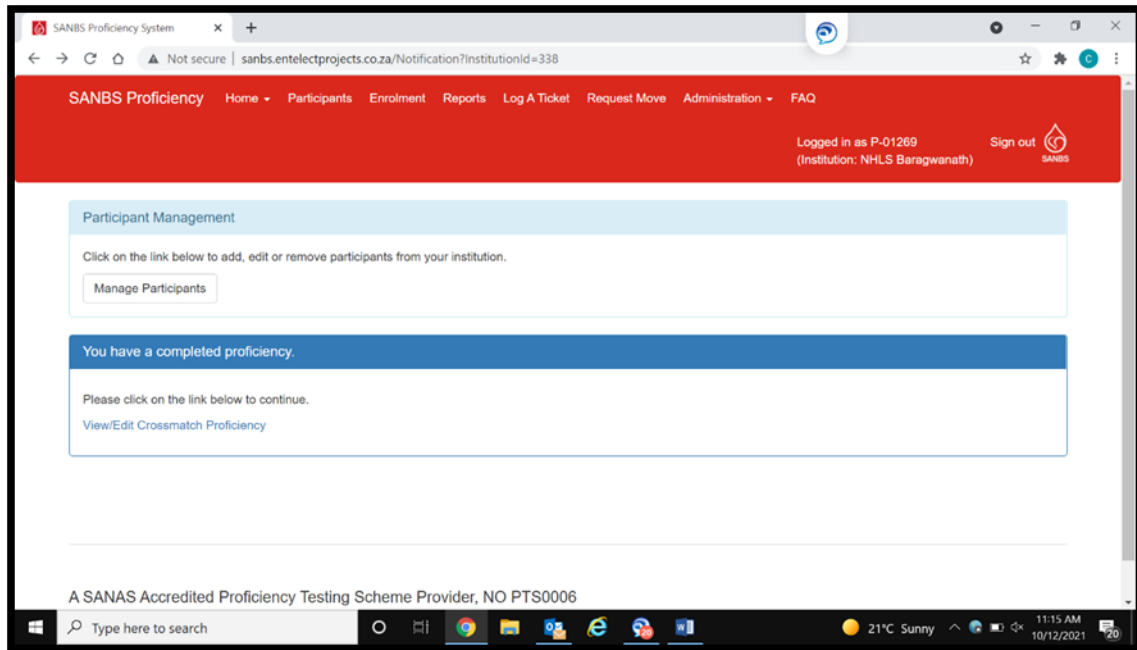
10.19. After the results have been completed, the system will display a message confirming the results have been completed and saved:



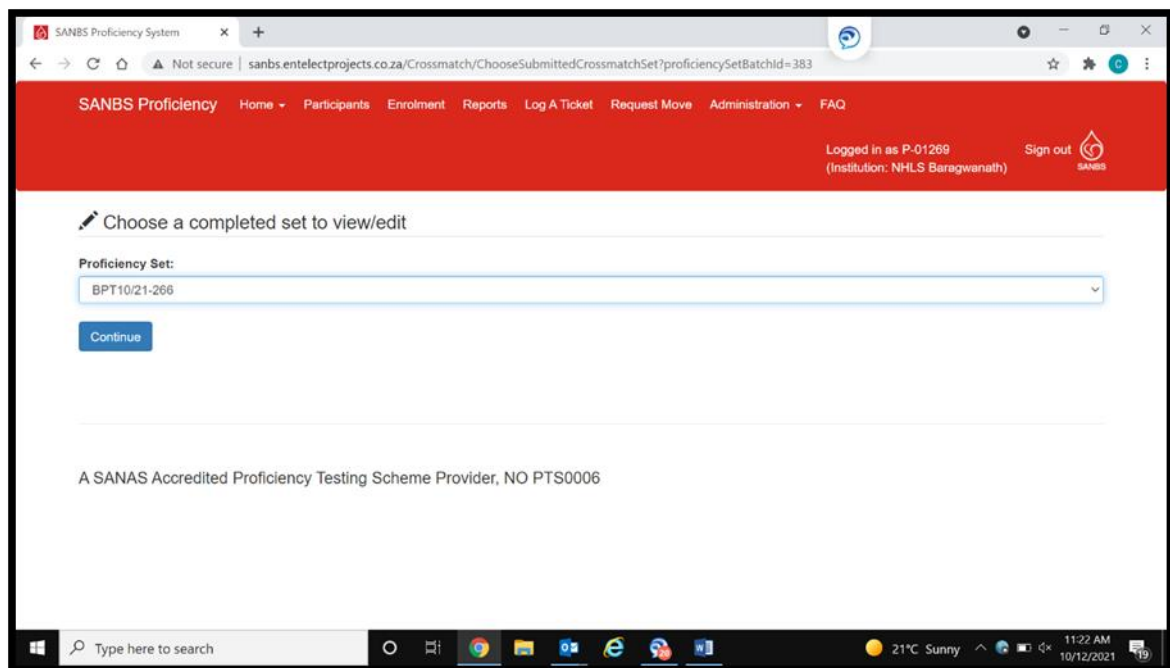
10.20. The participant will receive an email displaying the proficiency details and results entered.



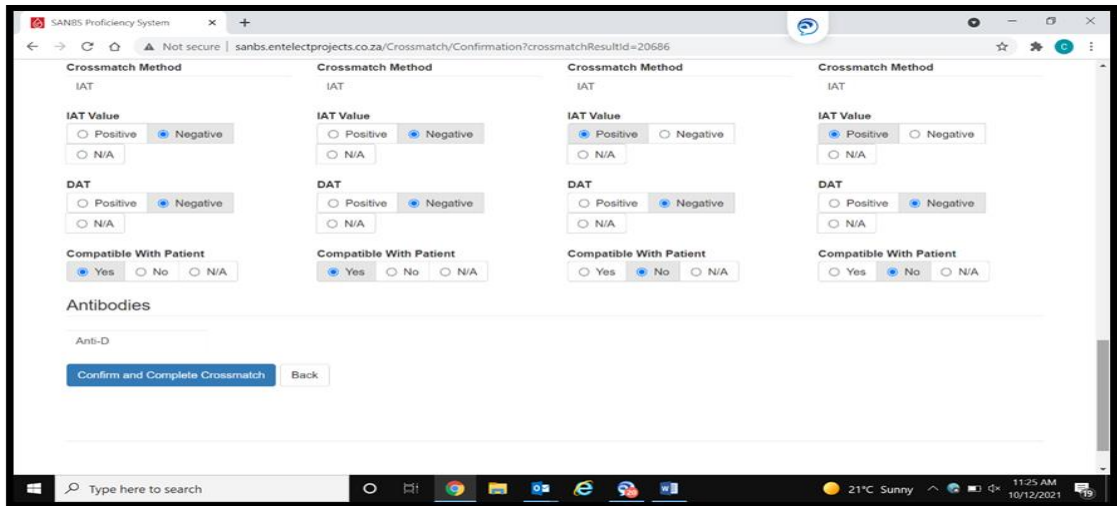
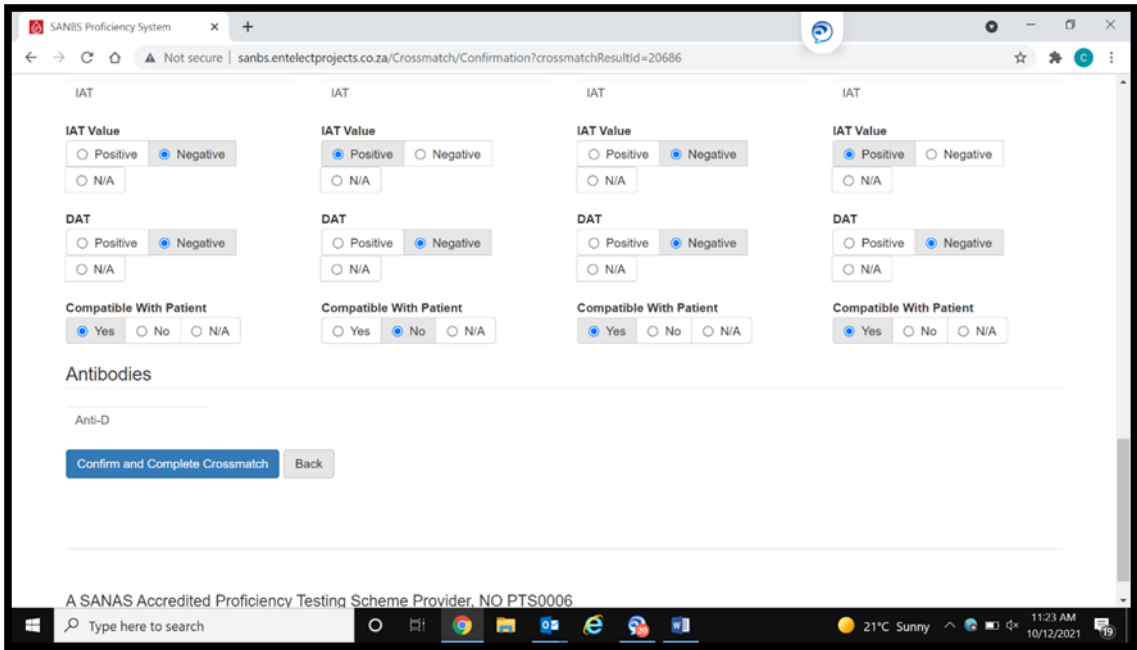
10.21. The following will appear on the Proficiency Programme Dash screen. If you have realised with the "Confirmation" e-mail that a mistake was made on entering of results, the result can be edited until the closing date of that Proficiency. Click on "View/Edit Crossmatch Proficiency".



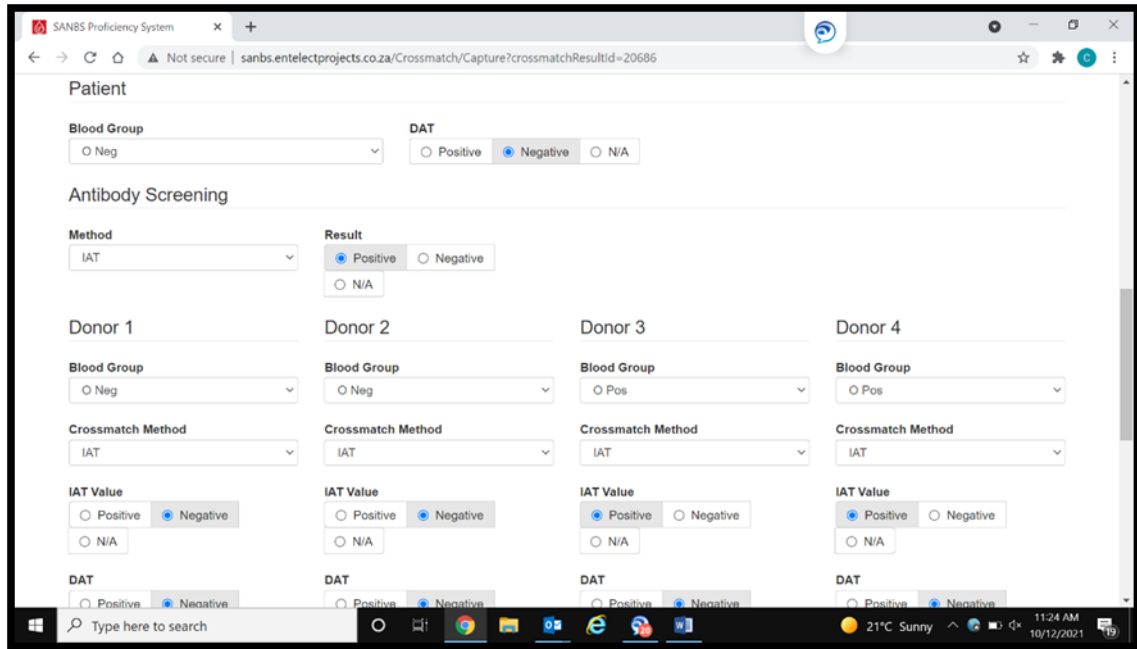
10.22. Choose the relevant Set number to edit the results previously entered.



10.23. The system will take you to the "Confirm and Complete the Crossmatch" screen. PRESS ON THE "BACK" BUTTON TO BE ABLE TO EDIT PREVIOUS RESULTS ENTERED.

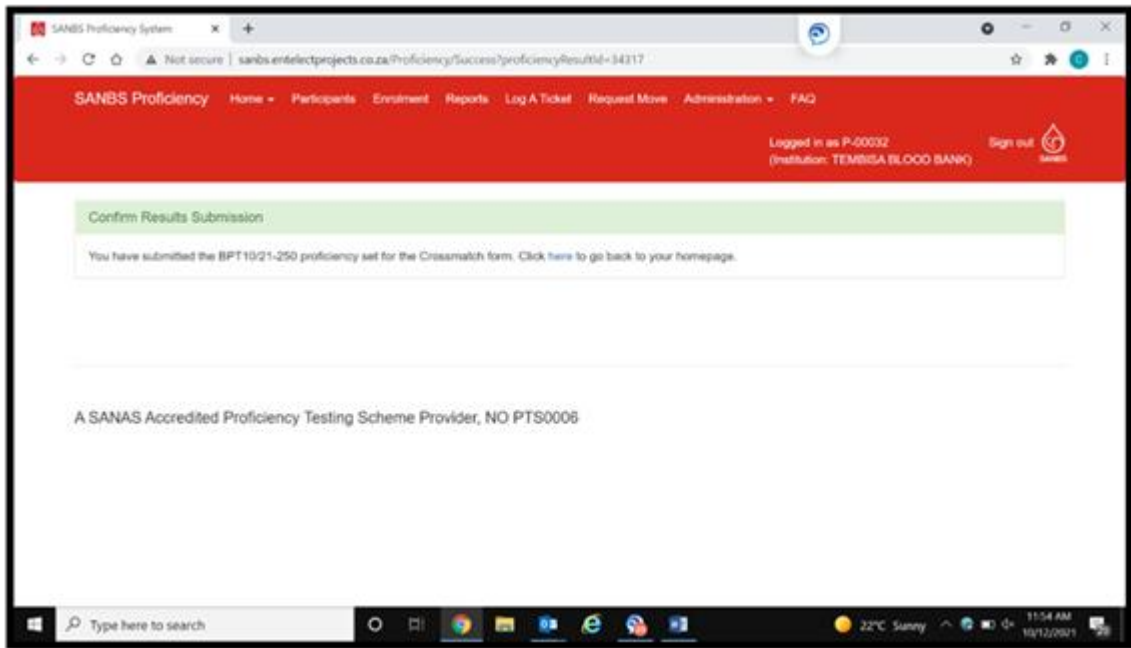


You will be taken to the first screen to edit results entered previously. Edit the results and click on "Continue".



10.24. The system will display the summary page with all the entered results. Ensure that all the results are correct and click on the "Confirm and Complete Crossmatch" button.

10.25. The "Confirm Results submission" will appear to confirm that results were entered.



Dear: P-01269

Congratulations you have completed the Crossmatch proficiency with the BPT10/21-266 proficiency set.

You captured the following results:

Date of Testing 2021/10/12 00:00:00

Method Used Manual

Sample Integrity

Patient Cell Sample Integrity Acceptable

Patient Serum Sample Integrity Acceptable

Donor 1 Sample Integrity Acceptable

Donor 2 Sample Integrity Acceptable

Donor 3 Sample Integrity Acceptable

Donor 4 Sample Integrity Acceptable

Patient

Patient Blood Group O Neg

DAT Negative

Screening Positive - IAT

Donor 1

Donor 1 Blood Group O Neg

Donor 1 IAT Results Negative - IAT

Donor 1 DAT Negative

Donor 1 Compatible With Patient Yes

Donor 2

Donor 2 Blood Group O Neg

Donor 2 IAT Results Negative - IAT

Donor 2 DAT Negative

Donor 2 Compatible With Patient Yes

Donor 3

Donor 3 Blood Group O Pos

Donor 3 IAT Results Positive - IAT

Donor 3 DAT Negative

Donor 3 Compatible With Patient No

Donor 4

Donor 4 Blood Group O Pos

Donor 4 IAT Results Positive - IAT

Donor 4 DAT Negative

Donor 4 Compatible With Patient No

Antibodies

- Anti-D

* Subject to terms and conditions

10.26. The participant will again receive an email displaying the proficiency details and results that has been edited.

10.27. Results are evaluated automatically on the system after the due date.

11. Generate a Proficiency report.

The SANBS Proficiency Staff are responsible for the creation and approval of the following reports:

All proficiencies:

- Participant Result:
Display results entered per participant and marks allocated.
- Proficiencies Outstanding:
Number of proficiencies outstanding per Institution.
- Proficiency Results Summary:
Summary of proficiency with % passed and failed.
- Memoranda-The Proficiency Memoranda for each set sent to Institute.

11.1. The SANBS Proficiency Staff will generate and approve the relevant proficiency report within 5 days of the due date.

11.2. The supervisor/participant can click on the Reports button on top of the logon screen.



Note: Supervisors/Managers (Primary Participant) will be able to view reports for the whole Institution where participants will only be able to view their own reports.

11.3. All approved reports that can be viewed will be displayed on the report main page:

Report Type	Version Number	Created On	Status	Approver	Applies to
Proficiencies Completed	1	2015-06-04	Approved	Niekerk, Truscha	Crossmatch SANBS Ermelo Blood Bank BPT02/14 From 2015-01-01 To 2015-12-31
Proficiencies Completed	1	2015-06-04	Approved	Niekerk, Truscha	Crossmatch SANBS Ermelo Blood Bank P-00117 BPT02/14 From 2015-01-01 To 2015-12-31

11.4. Reports can be filtered by the following:

- On "Proficiency" select, the type of Proficiency Report needed.

- On the "Proficiency Set Batch" select the batch number required, press "Filter".

- Click on the relevant report to view it by examples "Proficiency Result Summary" or "Participants Results".

Distribution List	3	2018-05-23	Approved	Simelane, Pontsho	Crossmatch SANBS Chris Hani Baragwanath Blood Bank BPT05/18 From 2018-01-01 To 2018-12-31
Proficiency Result Summary	1	2018-06-07	Approved	Simelane, Pontsho	Crossmatch SANBS Chris Hani Baragwanath Blood Bank BPT05/18 From 2018-01-01 To 2018-12-31
Participants Results	1	2018-06-07	Approved	Simelane, Pontsho	Crossmatch SANBS Chris Hani Baragwanath Blood Bank BPT05/18 From 2018-01-01 To 2018-12-31
Participants Results	1	2018-06-07	Approved	Simelane, Pontsho	Crossmatch SANBS Chris Hani Baragwanath Blood Bank P-01385 BPT05/18 From 2018-01-01 To 2018-12-31

- Click on the relevant report to view it. The system will display the report information e.g. status of the report, who approved it, date created and approved.

- Click on the View button to View and then Download the report or Click on the **Download** button to download and view the report when required. The report will download to the relevant internet browser and can be saved or printed from there.
- The reports will remain active and can be viewed at any time during the annual proficiency period.

12. Instrument management

12.1. Steps to follow:

- The serial number of all new Instruments with the relevant instrument details must be added to the Proficiency System, by the Primary Participant.
- Any changes in the instrument status will be performed by the Primary Participant.

12.2. To add an instrument to the proficiency system.

- Log onto the Proficiency system.
- Click on the “Administration” option.
- Select the Type of Instrument option by example Crossmatch Instrument.



12.3. On the following screen click on the “Add” button.

12.4. Add the Serial number of the Instrument and Select the Type of Instrument. Press save.

12.5. On the following screen, the instrument will be on the system, but will not be assigned to a Blood bank / Laboratory. Click on the "Assign to institute".

Complete the process by selecting the "institution" the instrument must be allocated to, and click on the "Assign Instrument to Institution". The Crossmatch Instrument will now be allocated to the Blood Ban.

12.6. When an Instrument has to be taken off the system due to replacement or breakdown. Click on the "Unassign From Institution". The instrument will be "Unassigned".

12.7. To move an instrument to another institution

12.7.1. Log onto the Proficiency system.

12.7.2. Click on the "Administration" option.

12.7.3. Click on "_____ Instruments", by example Crossmatch Instrument.

12.7.4. Enter the serial number of the instrument and press "**Filter**". Confirm all information correct (Type and Institution). Click on the Serial number.

12.7.5. Press "**Unassign from Institution**".

12.7.6. The Institution to which the Instrument is being transferred, follow instructions from **12.2.** to re-assign the Instrument to the required institute.

13. Print Certificate of Participation.

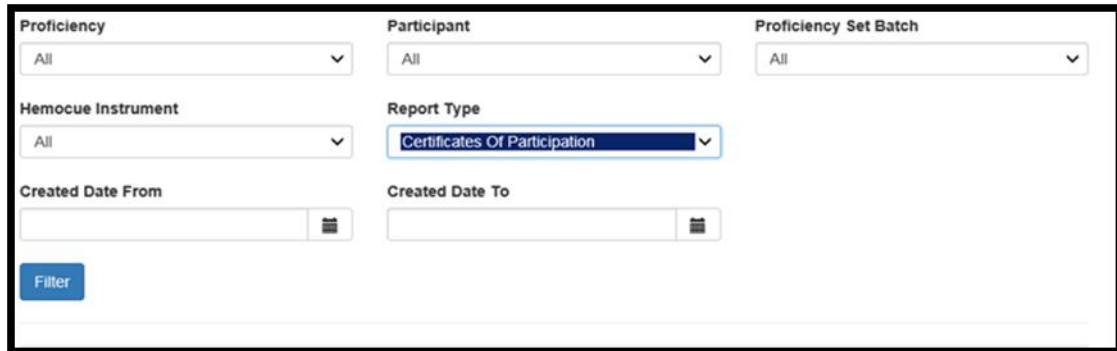
13.1. At the end of the annual Proficiency Program period, the SANBS Quality Department will generate Certificates of Participation per Institution and per participant. The Institution supervisor/manager will receive an email stating that there is a new report available to view.

Note: The same will apply for participants but they will only be able to see their own report and not that off all the participants at their Institution.

13.2. The supervisor/manger (Primary Participant) can click on the Reports button on top of the screen.

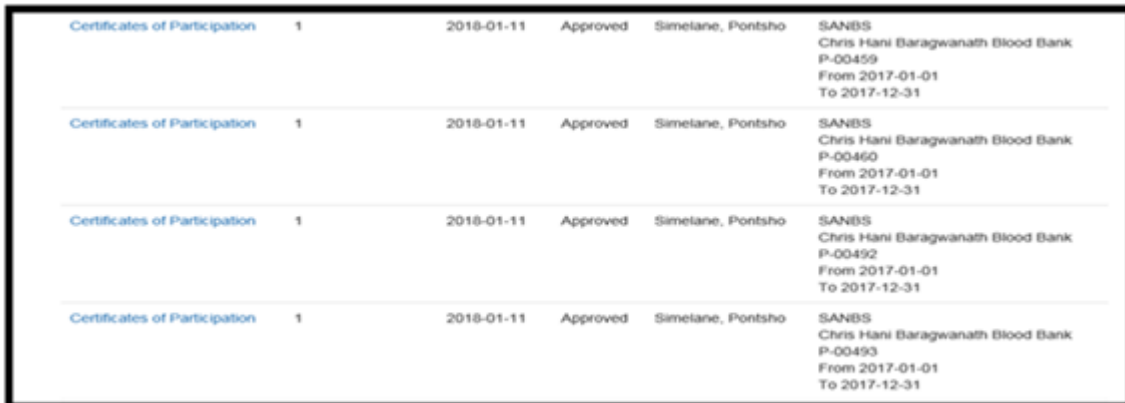


13.3. On "Report Type", select the "Certificate of Participation". Press "Filter".



The image shows a filter form with the following fields: Proficiency (All), Participant (All), Proficiency Set Batch (All), Hemocue Instrument (All), Report Type (Certificates Of Participation), Created Date From, and Created Date To. A blue Filter button is at the bottom left.

13.4. All available reports will be displayed on this screen. The supervisor/manager (Primary Participant) will be able to see the Institution "Certificate of Participation" as well as each participant's "Certificate of Participation" e.g.



Certificates of Participation	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Chris Hani Baragwanath Blood Bank P-00459 From 2017-01-01 To 2017-12-31
Certificates of Participation	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Chris Hani Baragwanath Blood Bank P-00460 From 2017-01-01 To 2017-12-31
Certificates of Participation	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Chris Hani Baragwanath Blood Bank P-00492 From 2017-01-01 To 2017-12-31
Certificates of Participation	1	2018-01-11	Approved	Simelane, Pontsho	SANBS Chris Hani Baragwanath Blood Bank P-00493 From 2017-01-01 To 2017-12-31

13.5. To view the Certificate click on the report name e.g. Certificates of Participation.

13.6. Click on the View button to View and then download the report, or Click on the Download button to download and view the report when required. The report will download to the relevant internet browser and can be saved or printed from there.

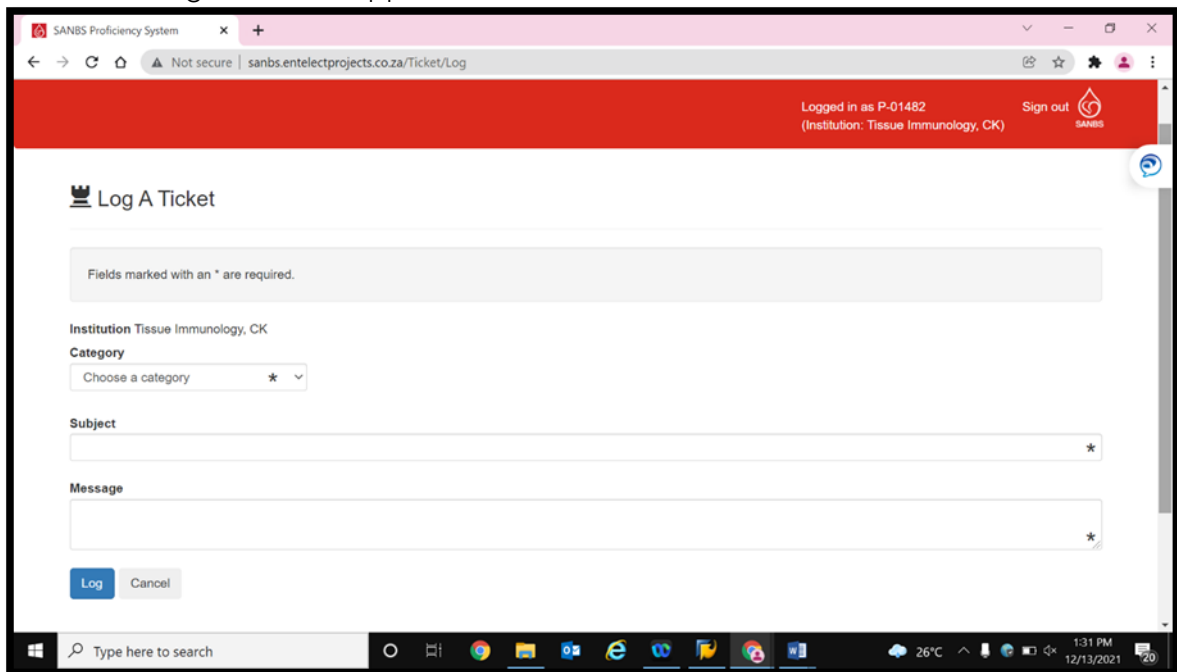


14. Log a Ticket

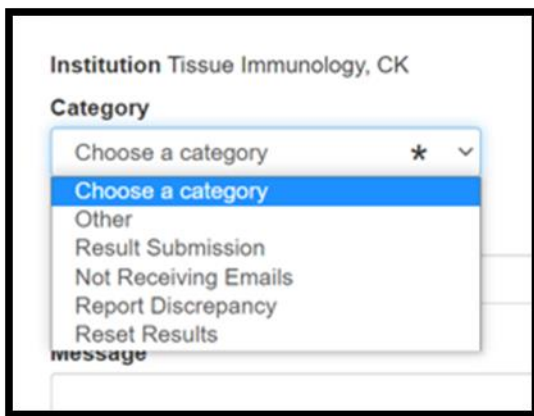
- 14.1. "Log A Ticket" option has been installed onto the SANBS Proficiency System to assist participants with a platform for reporting problems encountered on the system.
- 14.2. When a problem is, being encountered click on the "Log A Ticket" on the Dashboard screen.



14.3. The following screen will appear



14.4. Select the category related to the problem encountered.



Institution Tissue Immunology, CK

Category

Choose a category * v

Choose a category

Other

Result Submission

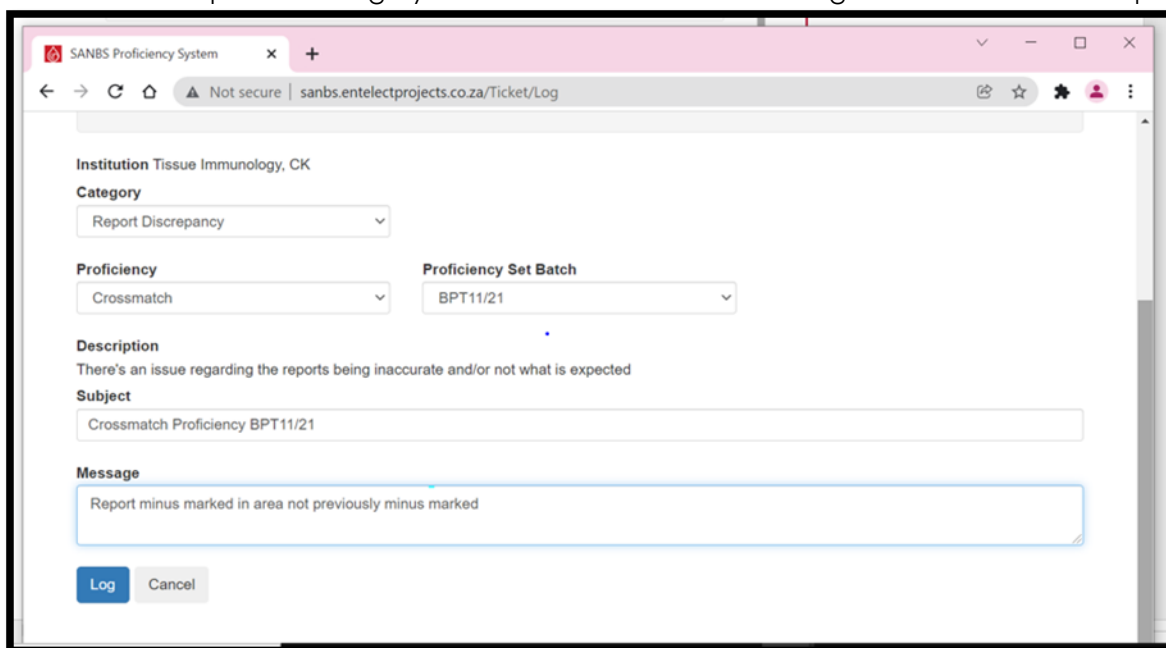
Not Receiving Emails

Report Discrepancy

Reset Results

message

When a specific category has been selected the following information will be requested.



SANBS Proficiency System

Not secure | sanbs.entelectprojects.co.za/Ticket/Log

Institution Tissue Immunology, CK

Category

Report Discrepancy v

Proficiency

Crossmatch v

Proficiency Set Batch

BPT11/21 v

Description

There's an issue regarding the reports being inaccurate and/or not what is expected

Subject

Crossmatch Proficiency BPT11/21

Message

Report minus marked in area not previously minus marked

Log Cancel

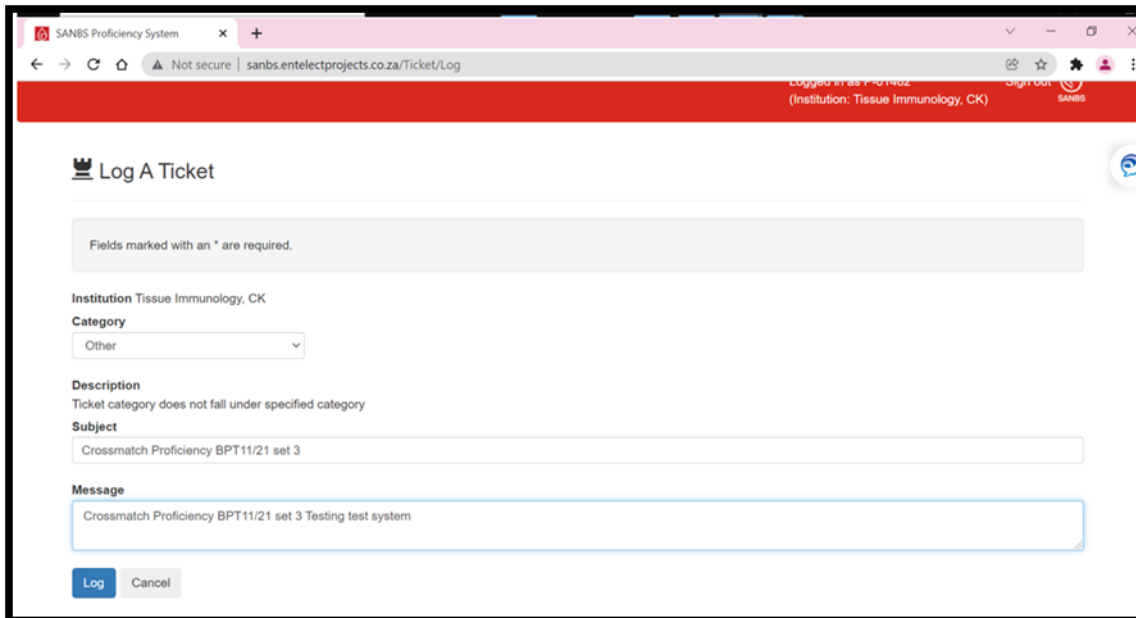
14.5. Under Proficiency select the Proficiency Programme problem has been encountered

14.6. Under Proficiency Set Batch select the Proficiency Batch number problem has been encountered.

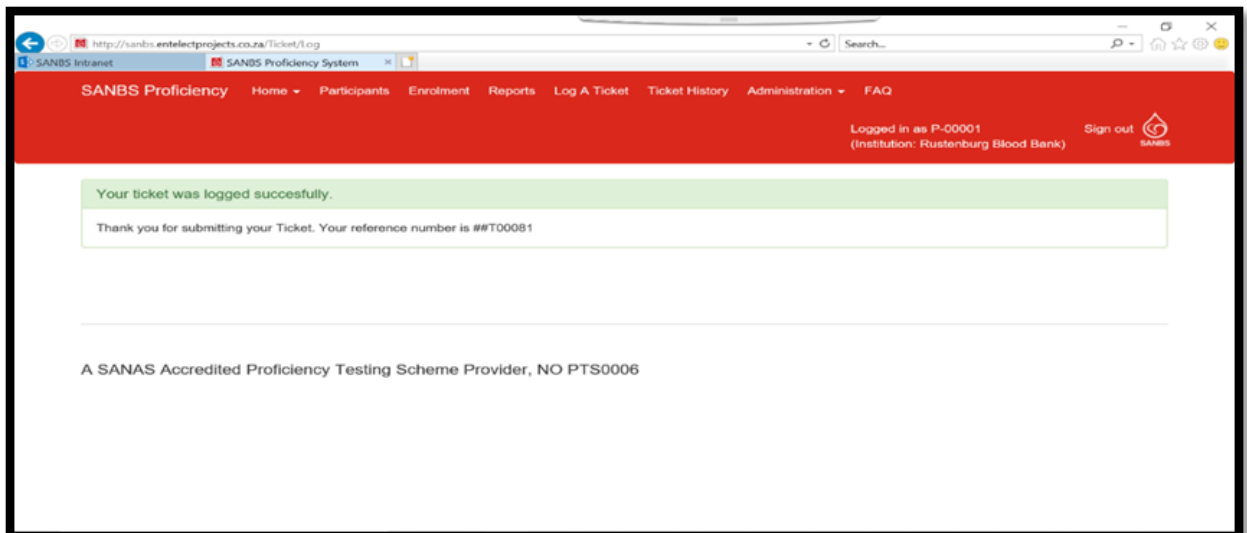
14.7. Under "Message" type in the problem that is being encountered. This must include institution name, set number, etc Click on the "Log" button.

14.8. Complete the "Subject", it must start with Program name and batch number, followed by reason for ticket, example result entry/ Report, etc.

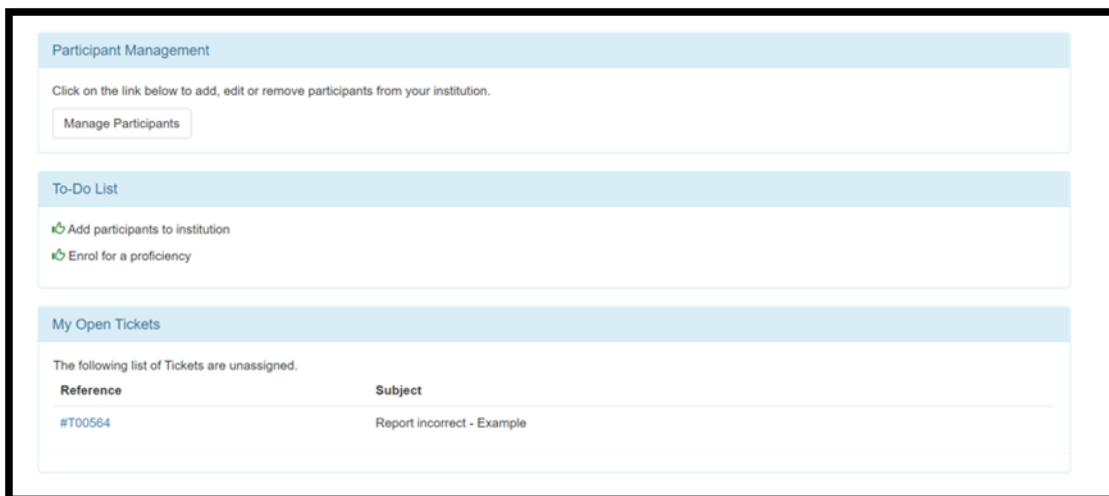
14.9. Where the Category "Other" has been chosen, the Proficiency and Set Batch Information will not be required.



14.10. The following screen will appear to inform that this ticket has been logged and a Reference number of this ticket has been allocated.



14.11. On your "Home" page, your ticket will appear, under the "My Open Tickets".



By clicking on the Ticket number in blue the following screen will appear.

Participant Details			
Logged by Institution	Shuping, Pontsho Quality Control	Logged At Email Address	Friday, March 12, 2021 11:53:01 AM proficiency@sanbs.org.za

Ticket Details
<p>Report incorrect - Example</p> <p>The Participant report from the BPT--/-- proficiency test has failed the following participant; P-xxxxx. Could this please be looked at and could we please be advised. Participant P-xxxxx, at the following Blood Bank, -----.</p>

Ticket Notes From Proficiency
Note Created On : Friday, March 12, 2021 11:53:01 AM
Ticket created on 2021-03-12 by Shuping, Pontsho

Ticket Comments From Participant
<p>Add a Ticket Comment</p> <p>Comment Message</p> <input type="text"/> <p>Add Comment</p>
A SANAS Accredited Proficiency Testing Scheme Provider, NO PTS0006

When a Coordinator has accepted this ticket, the participant will receive an email notification.

Message Mimiccast Tell me what you want to do... A ticket status has Changed - Message (HTML)

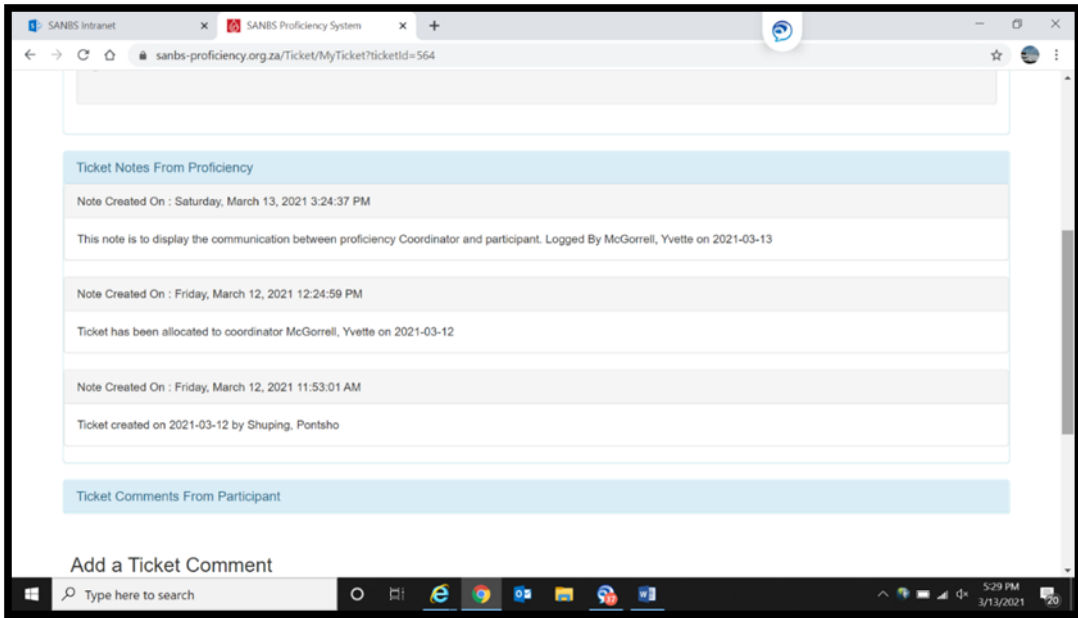
From: info@sanbs-proficiency.org.za
 Subject: A ticket status has Changed

From: SANBS Proficiency

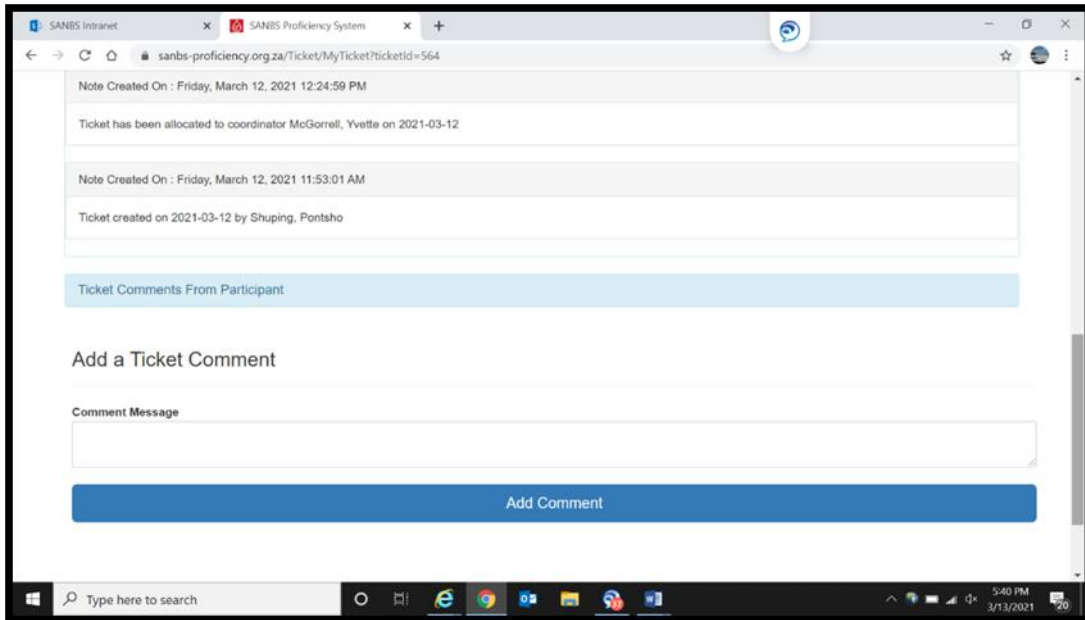
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

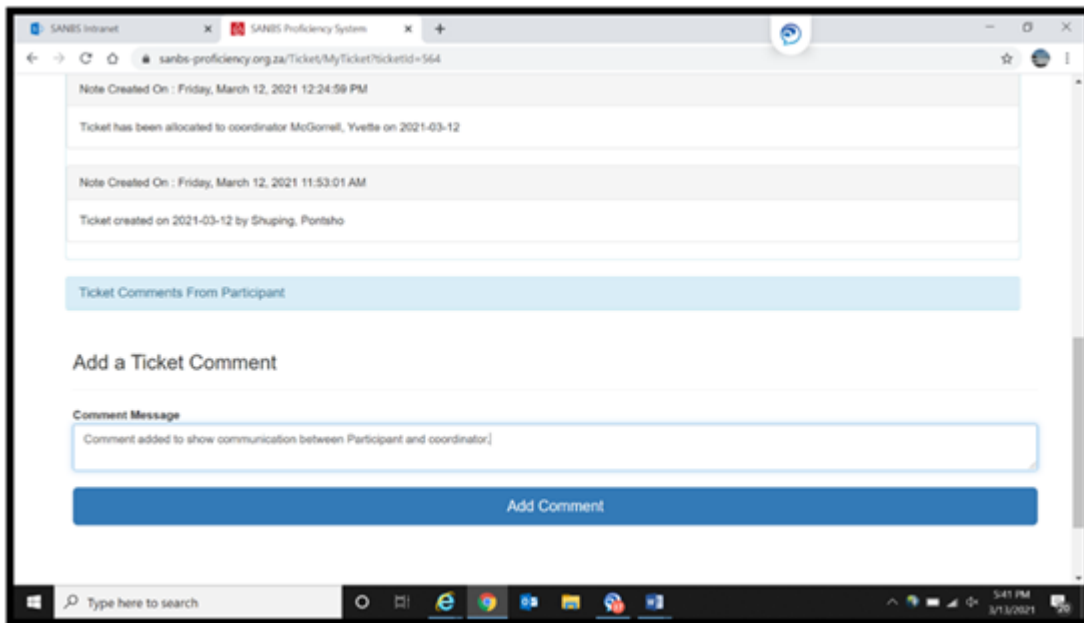
A ticket with reference number #T00515 has had a status
 The current status is Ticket Allocated to Coordinator
 * Subject to terms and conditions

A note will be added to your ticket to update you on the progress of your query. Log onto the ticket on a regular basis, as this will be used for communication between the participant and Coordinator for more information needed.

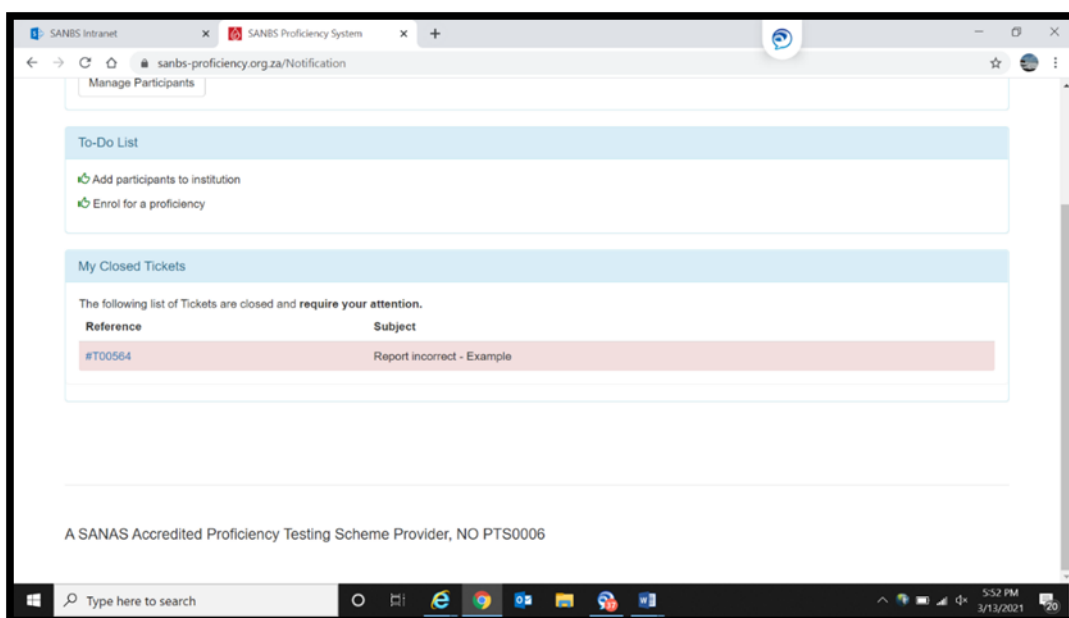


When information has been requested by the Coordinator, enter this information under the "Ticket Comments from Participant".

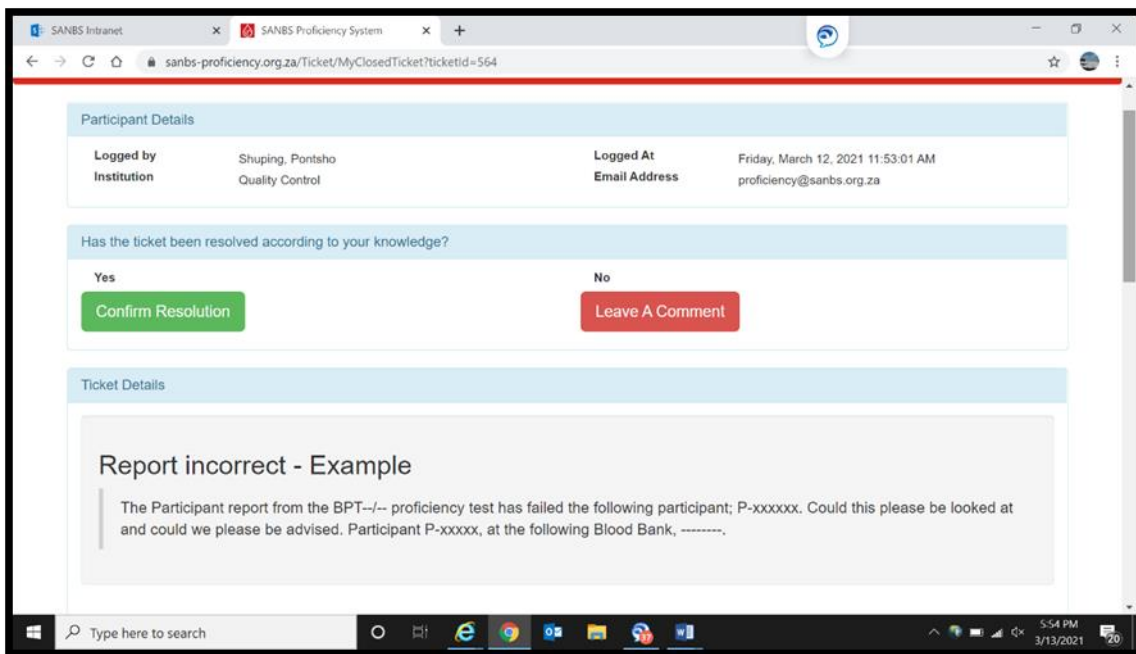




14.12. Resolved tickets will appear under “My Closed Ticket”.

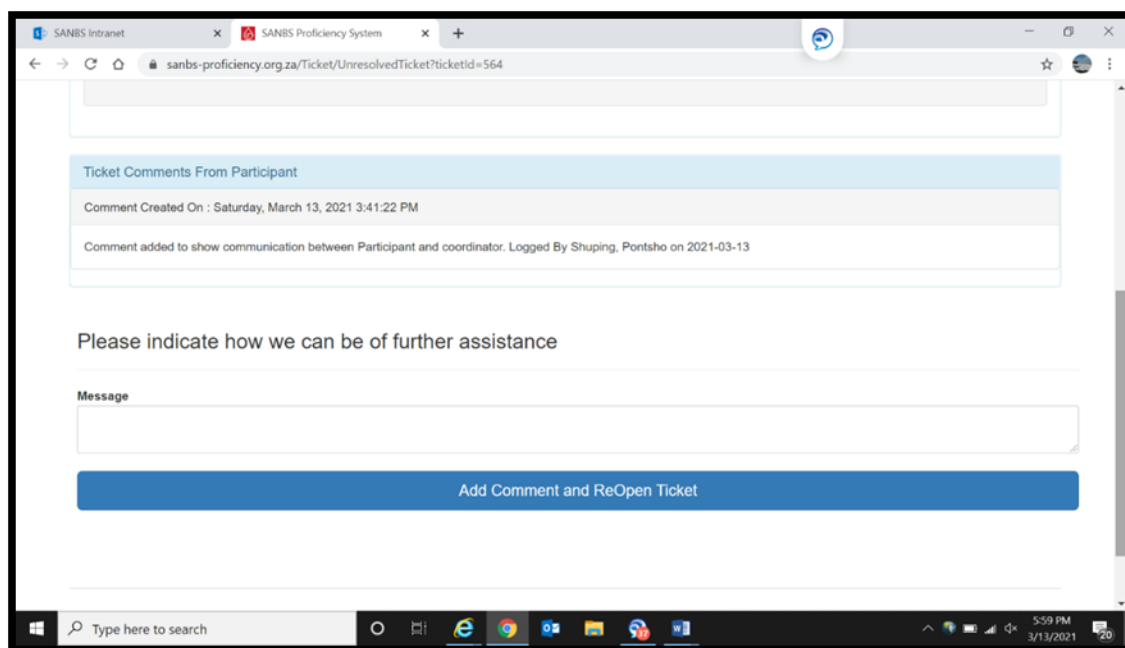


If the problem has still not been solved, this ticket can be “re-opened” by the participant. Click on the ticket number under the “My Closed ticket”. The following screen will appear.



If the problem has been solved Click on the “Confirm Resolution”.
 If the ticket has not been solved Click on the “Leave A Comment”

Clicking on the “Leave A Comment” the following screen will appear. Add information to assist for the problem to be solved.



- 14.13. This ticket will be moved back to My Allocated Ticket, to show that the ticket has been opened
- 14.14. This ticket will be moved to My Allocated Ticket, to show that the ticket has been opened.
- 14.15. When the problem has been solved Click on the “Confirm Resolution”.

15. Additional Information

- 15.1. The Package Insert relevant to the Proficiency Test to be completed and will be attached to the e-mail sent to the Institute on the Issue day.

Revision Summary

VERSION NUMBER	REVISION DETAILS
7	Updated 10.3. The Instruction sheet as an attachment with “Proficiency Set Ready” e-mail.