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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: <u>https://www.sanbs-proficiency.org.za/</u>

| SANBS Proficiency Home Price List On-Line User Guide Pro  | vificiency Catalog Information Contact FAQ Sign in SAMES                           |
|---|--|
| The SA National Blood Service Proficiency Testing Programs (PTP) are accredited to ISO / IEC 17043 – PTS accreditation certificate number PTS0006. Being recognised as a centre of excellence in the provision of laboratory and blood banking proficiency testing for transfusion medicine. The program spans the African continent with more than 15 countries registered on the program. The programs are co-ordinated and administered within the South African National Blood Service (SANBS)  | Click here to register for a proficiency<br>program.<br>Register a New Institution |
| focusing on efficiency, quality, affordability and service delivery<br>to our customers. SANBS is a registered non-profit company<br>that operates on a cost recovery model.  | Existing Customers Please Sign In to continue                                      |
| CONTROL OF | Profeency Testing Schemes Provider   |

### 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 <u>REGISTER A NEW INSTITUTION</u> 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:

| Click here to register for a proficiency program. |
|---|
| Register a New Institution                        |
|   |

Please note! All prompts marked with <mark>an is</mark> 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.

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1043876 REV 7 (??/??/??) Page 2 of 32 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:
  - a. Manage participants.
  - b. Order proficiencies.
  - c. Run laboratory reports.
  - d. 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:

- a. Manage participants.
- b. 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:

I agree to the Terms and Conditions

- 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 successfully captured

Click here to go back to your homepage.

|   | s to register a new institution. Your details w<br>program.                                   | ill be reviewed by a member of | SANBS, and you will be | notified by email if your institution has |
|---|---|--------------------------------|------------------------|---|
| Fields marked with an * are required  | d.  |                                |                        |   |
| Institution Details   |   |                                |                        |   |
| Institution Name  |   | Organization                   |                        |   |
| Bruma Blood Bank  |   | SANBS                          |                        | ~   |
| Telephone   | Fax   |                                | Company B              | mail                                      |
| 0117641234  | 0117641254  |                                | cheryl.beu             | kes@sanbs.org.za                          |
| Primary Participant Deta<br>First Name<br>Cheral<br>Secondary Participant D<br>First Name                                       | Sumame<br>Beukes  |                                | Email<br>cheral.l      | beukes@sanbs.org.za                       |
| Stanley   | Poongavanum   |                                |                        | .poongavanum@sanbs.org.za                 |
| Address Line 1  | Address Line 2  |                                | Suburb                 |   |
| Address Line 1<br>21 Berkley Ave<br>Country   | Address Line 2  |                                | Suburb<br>Bruma        |   |
| 21 Berkley Ave  |   |                                |                        |   |
| 21 Berkley Ave  | Address Code  |                                |                        |   |
| 21 Berkley Ave Country South Africa   | Address Code  |                                |                        |   |
| 21 Berkley Ave<br>Country<br>South Africa<br>Billing Details<br>☑ I am a SANBS institution.                                     | Address Code  |                                |                        |   |
| 21 Berkley Ave<br>Country<br>South Africa<br>Billing Details<br>☑ I am a SANBS institution.                                     | Address Code  |                                |                        |   |
| 21 Berkley Ave Country South Africa Billing Details ☑ I am a SANBS institution. Invoices will be sent to the guara              | Address Code<br>Address Code<br>1451<br>antor using the email address provided below.         |                                |                        |   |
| 21 Berkley Ave Country South Africa Billing Details I am a SANBS institution. Invoices will be sent to the guara Guarantor Name | Address Code Address Code I1451 antor using the email address provided below. Guarantor Email |                                | Bruma                  |   |

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#### Example of an External Institution:

| been accepted into the proficiency program.  | er a new institution. Your details will be   | reviewed by a member of SANBS | i, and you will be notified by email if your institution has |
|--|--|-------------------------------|--|
| Fields marked with an * are required.  |  |                               |  |
| Institution Details  |  |                               |  |
| Institution Name   |  | Organization                  |  |
| Bruma MHLS   |  | NHLS                          | ~  |
| Telephone  | Fax  |                               | Company Email  |
| 0117641234   | 0117641254   |                               | cheryl.beukes@nhls.org.za                                    |
| Physical Address   |  |                               |  |
| Please be aware that this the address to white   | ch samples required for proficiency test   | s will be delivered.          |  |
| Address Line 1   | Address Line 2   |                               | Suburb   |
| 21 Berkley Ave   |  |                               | Bruma  |
| Country  | Address Code   |                               |  |
| South Africa   | ✓ 1451   |                               |  |
| Secondary Participant Details  |  |                               |  |
| Secondary Participant Details  | Surname  |                               | Email  |
|  | Surname<br>Poongavanum   |                               | Email<br>stanley.poongavanum@nhls.org.za                     |
| First Name   |  |                               |  |
| First Name<br>Stanley<br>Billing Details   | Poongavanum  |                               |  |
| First Name Stanley Billing Details I am a SANBS institution. Invoices will be sent to the guarantor using th Guarantor Name  | Poongavanum e email address provided below. Guarantor Email  |                               |  |
| First Name Stanley Billing Details I am a SANBS institution. Invoices will be sent to the guarantor using the  | Poongavanum  | rg.za                         |  |
| First Name Stanley Stanley Billing Details I am a SANBS institution. Invoices will be sent to the guarantor using th Guarantor Name Petro Mabuye Address Line 1                      | Poongavanum Poongavanum e email address provided below. Guarantor Email petro.mabyue@nhis.o Address Line 2 | rg za                         | stanley.poongavanum@nhls.org.za                              |
| First Name Stanley Billing Details I am a SANBS institution. Invoices will be sent to the guarantor using th Guarantor Name Petro Mabuye   | Poongavanum e email address provided below. Guarantor Email petro.mabyue@nhis.or                           | rg.za                         | stanley.poongavanum@nhls.org.za                              |
| First Name Stanley Billing Details I am a SANBS institution. Invoices will be sent to the guarantor using th Guarantor Name Petro Mabuye Address Line 1                              | Poongavanum Poongavanum e email address provided below. Guarantor Email petro.mabyue@nhis.o Address Line 2 | rg.za                         | stanley.poongavanum@nhls.org.za                              |
| First Name Stanley Stanley Billing Details I am a SANBS institution. Invoices will be sent to the guarantor using th Guarantor Name Petro Mabuye Address Line 1 P O Box 1414         | e email address provided below.  Guarantor Email petro.mabyue@nhis.or Address Line 2 Bruma                 | rg.za                         | stanley.poongavanum@nhls.org.za                              |
| First Name Stanley Stanley Billing Details I am a SANBS institution. Invoices will be sent to the guarantor using th Guarantor Name Petro Mabuye Address Line 1 P O Box 1414 Country | e email address provided below.  | rg.za                         | stanley.poongavanum@nhls.org.za                              |

#### 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.

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#### 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=106/24ce-0c26-4673-8dd9-730191dcec45

- 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.



Example of a Participant Registration Screen:

| 🖍 Participant                         |                  |
|---------------------------------------|------------------|
| Fields marked with an * are required. |                  |
| User Details                          |                  |
| First Name                            | Surname          |
| Joseph                                | Beatrix          |
| Email                                 |                  |
| renetha.b+777@gmail.com               |                  |
| Password creation instructions:       |                  |
| Your Password must contain:           |                  |
| Password                              | Confirm Password |
|                                       |                  |
| Contact Details                       |                  |
| Mobile Number                         | Telephone Number |
| 0821111234                            | 0117619000       |
| Address Line 1                        | Address Line 2   |
| 34 Rose Street                        |                  |
| Suburb                                | Country          |
| Florida                               | South Africa     |
| Address Code                          |                  |
| 1754                                  |                  |
| Register                              |                  |
|                                       |                  |

INF-QCL-015 1043876 REV 7 (??/??/??) Page 6 of 32 Note: The system will display a message that the user has been successfully registered and may sign into the system.

| User successfully registered          |                      |
|---------------------------------------|----------------------|
| Thank you for your submission. Please | Sign In to continue. |
| ejected 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.

| SANBS Official E | mail |
|------------------|------|
|------------------|------|

#### Dear: Bruma NHLS

6.

Thank you for your application to participate in the SANBS proficiency testing programme. Unfortunately your country restricts the transport of bio-hazardous materials to and from South Africa and therefore we are unable to process your application. For any further gueries, please do not hesitate to contact SANBS proficiency testing on +27800 11 90 31 or send an email to <u>Proficiency@sanbs.org.za</u>

# 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.
- 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.

| Participant Managemen        | nt  |
|------------------------------|---|
| Click on the link below to a | add, edit or remove participants from your institution. |
| Manage Participants          |   |
|                              |   |

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

| Status     |   | Show Deactivated | P-Number |  |
|------------|---|------------------|----------|--|
| All        | ~ | ⊖ Yes ⊖ No       |          |  |
| First Name |   | Surname          | Email    |  |
|            |   |                  |          |  |

- 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.

| Fields marked with an * are required. |                                  |   |  |
|---------------------------------------|----------------------------------|---|--|
| Role                                  | Email                            |   | First Name   |
| Participant                           | ~                                | * |  |
|                                       |                                  |   |  |
| Surname                               | Institution                      |   | Capture proficiency results after adding             |
|                                       | Institution * Choose Institution | ~ | Capture proficiency results after adding 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.

INF-QCL-015 1043876 REV 7 (??/??/??) Page 8 of 32 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.

| Participant Institution Change Request  |
|---|
| Participant Bloemfontein Two with email renetha b+12@gmail.com exists in the system and is assigned to another institution.<br>Would you like to send this participant a change request to join your instition?<br>Yes Cancel |

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.

| SANBS         | 8 Proficiency | Home - Participan | ts Enrolmer | ports Administra | ation - FAQ |
|---------------|---------------|-------------------|-------------|------------------|-------------|
| 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:       | Total Sets:   |                   |             |                  |             |
| No Order      | 120           |                   |             |                  |             |

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

| Proficiencies |             |           |         |          |          |
|---------------|-------------|-----------|---------|----------|----------|
| Crossmatch    |             |           |         |          |          |
| January       | February    | March     | April   | Мау      | June     |
| 10            | 10          | 10        | 10      | 10       | 10       |
| July          | August      | September | October | November | December |
| 10            | 10          | 10        | 10      | 10       | 10       |
| Status:       | Total Sets: |           |         |          |          |
| No Order      | 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.

| rossmatch  |                         |                |              |               |               |
|--|-------------------------|----------------|--------------|---------------|---------------|
| January  | February                | March          | April        | Мау           | June          |
| 10   | 10                      | 10             | 10           | 10            | 10            |
| July   | August                  | September      | October      | November      | December      |
| 10   | 10                      | 10             | 10           | 10            | 10            |
| Status:  | Total Sets:             |                |              |               |               |
|  |                         |                |              |               |               |
| No Order   | 120                     |                |              |               |               |
|  |                         |                |              |               |               |
| ntibody Identi                                     |                         | March          | April        | Мау           | June          |
| ntibody Identi                                     | feation                 | March<br>0     | April<br>0   | May<br>0      | June<br>0     |
| ntibody identi<br>January                          | February                |                |              |               |               |
| No Order<br>ntibody identi<br>January<br>July<br>0 | February<br>0           | 0              | 0            | 0             | 0             |
| ntibody Identi<br>January<br>10<br>July            | February<br>0<br>August | 0<br>September | 0<br>October | 0<br>November | 0<br>December |

- 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.

| SANBS Proficiency        | Home + | Institutions  | Participants   | Administration + | Reports | FAQ |
|--------------------------|--------|---------------|----------------|------------------|---------|-----|
| Order Successful         |        |               |                |                  |         |     |
| Thank you for submitting |        | Click here to | go back to you | homepage.        |         |     |

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".

| Proficiency        |   | Participant               |   | Proficiency Set Batch |   |
|--------------------|---|---------------------------|---|-----------------------|---|
| All                | ~ | All                       | ~ | All                   | ~ |
| Hemocue Instrument |   | Report Type               |   |                       |   |
| All                | ~ | Certificates Of Enrolment | ~ |                       |   |
| Created Date From  |   | Created Date To           |   |                       |   |
|                    | = |                           | = |                       |   |

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.

| Proficiency           |                 | Participant                   |                    | Proficiency Set               | Batch  |
|-----------------------|-----------------|-------------------------------|--------------------|-------------------------------|--|
| All                   | ~               | All                           |                    | All                           |  |
| Hemocue Instrument    |                 | Report Type                   |                    |                               |  |
| All                   | ~               | Certificates Of Enrolm        | nent               | ~                             |  |
| Created Date From     |                 | Created Date To               |                    |                               |  |
| 2018-01-01            | =               |                               |                    | 1                             |  |
| Filter                |                 |                               |                    |                               |  |
| Filter<br>Report Type | Version Nu      | mber Created On               | Status             | Approver                      | Applies to   |
|                       | Version Nu<br>1 | mber Created On<br>2018-01-11 | Status<br>Approved | Approver<br>Simelane, Pontsho | Applies to<br>SANBS<br>Quality Control<br>From 2018-01-01<br>To 2018-12-31 |

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

| Proficiency           |             | Participant              |        | Proficiency Set | Batch  |
|-----------------------|-------------|--------------------------|--------|-----------------|--|
| All                   | ~           | All                      | ~      | All             |  |
| Hemocue Instrument    |             | Report Type              |        |                 |  |
| All                   | ~           | Certificates Of Enrolmen | nt 🗸   | •               |  |
| Created Date From     |             | Created Date To          |        |                 |  |
| 2018-01-01            | =           |                          |        |                 |  |
| Filler                |             |                          |        |                 |  |
| Filter<br>Report Type | Version Num | nber Created On          | Status | Approver        | Applies to   |
|                       | Version Num | 2018-01-11               |        |                 | Applies to<br>SANBS<br>Quality Control<br>From 2018-01-01<br>To 2018-12-31 |

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

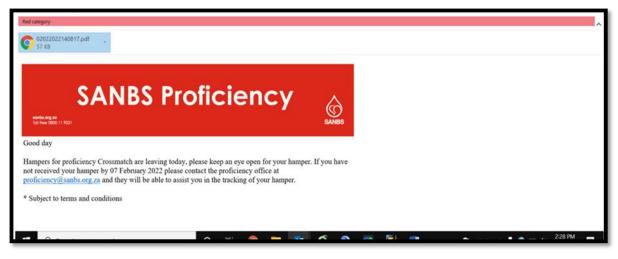
| Certificates of Enrolm  | ent Report  |  |  |
|---|-------------|--|--|
| Details   |             |  |  |
| Report Type   | Status      | Created Date   |  |
| Certificates of Enrolment   | Approved    | 2018-01-11   |  |
| Approved By   | Approved On | Version Number   |  |
| Simelane, Pontsho   | 2018-01-16  | 1  |  |
| SANBS<br>Quality Control<br>From 2018-01-01<br>To 2018-12-31<br>View Download Back<br>Sub-reports |             |  |  |
| Report Type   |             | Applies to   |  |
| Certificates of Enrolment   |             | SANBS<br>Quality Control<br>P-01005<br>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.



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- 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.

| SANES | SANBS Proficiency   | Home        | Participants     | Ordering    | Reports     | Hemocue Instruments | Proficiency Sets | Logged in as P-00083 | Sign out |
|-------|---|-------------|------------------|-------------|-------------|---------------------|------------------|----------------------|----------|
| Pa    | articipant Management   |             |                  |             |             |                     |                  |                      |          |
| -     | ck on the link below to add, e<br>Manage Participants           | dit or remo | ove participants | from your i | nstitution. |                     |                  |                      |          |
| с     | rolled Proficiency<br>ck on the below link to compl<br>ossmatch | ete your C  | ro smatch prof   | iciency     |             |                     |                  |                      |          |
| E     | nrolled Proficiency   | 1           |                  |             |             |                     |                  |                      |          |
|       | ck on the below link to complemocue                             | ete your H  | iemocue profici  | ency        |             |                     |                  |                      |          |

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

| Proficiency Set:  |
|---|
| Choose Proficiency Set<br>BPT02/14-21<br>BPT02/14-22<br>BPT02/14-23<br>BPT02/14-25<br>BPT02/14-26<br>BPT02/14-26<br>BPT02/14-27<br>BPT02/14-27<br>BPT02/14-28<br>BPT02/14-29<br>BPT02/14-30 |

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

| Testing Methodology                      |   |
|--|---|
| Date of Test 2015-07-21                  |   |
| Sample Integrity                         |   |
| Perform visual inspection on samples and | ndicate if their integrity is acceptable.   |
| Is the patient cells sample testable?    | Is the patient serum sample testable?   |
| Is the donor sample 1 testable?          | Is the donor sample 2 testable? Is the donor sample 3 testable? Is the donor sample 4 testable? Acceptable V Acceptable V |

- 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.

INF-QCL-015 1043876 REV 7 (??/??/??) Page 14 of 32 Note: If a test is not performed, select "N/A" in the drop down list for Crossmatch Proficiency.

| 041                     | <ul> <li>Positive</li> <li>Negative</li> </ul> |                         |                         |  |
|-------------------------|--|-------------------------|-------------------------|--|
|                         | ○ N/A  |                         |                         |  |
| Donor 1                 | Donor 2  | Donor 3                 | Donor 4                 |  |
| Blood Group             | Blood Group                                    | Blood Group             | Blood Group             |  |
| O Pos                   | V O Pos V                                      | O Pos 👻                 | O Pos 🗸                 |  |
| Crossmatch Method       | Crossmatch Method                              | Crossmatch Method       | Crossmatch Method       |  |
| IAT                     | v TAT v  | TAT Y                   | IAT ~                   |  |
| IAT Value               | IAT Value                                      | IAT Value               | IAT Value               |  |
| Positive     O Negative | O Positive   Negative                          | Positive     Negative   | O Positive   Negative   |  |
| ○ N/A                   | ○ N/A  | O N/A                   | () N/A                  |  |
| DAT                     | DAT  | DAT                     | DAT                     |  |
| O Positive O Negative   | O Positive O Negative                          | O Positive O Negative   | O Positive O Negative   |  |
| • N/A                   | N/A  | N/A                     | • N/A                   |  |
| Compatible With Patient | Compatible With Patient                        | Compatible With Patient | Compatible With Patient |  |
| ○ Yes ● No ○ N/A        | Yes O No O N/A                                 | ◯ Yes ● No ◯ N/A        | Yes O No O N/A          |  |
| Continue Save           |  |                         |                         |  |
|                         |  |                         |                         |  |

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.

|  | tprojects.co.za/Crossmatch/ChooseTestItems?p |                                  |  | * |
|--|--|----------------------------------|--|---|
| Fields marked with an * are required.    |  |                                  |  |   |
| Testing Methodology                      |  |                                  |  |   |
| Date of Test                             |  |                                  |  |   |
| 2021-04-07                               | <b></b>                                      |                                  |  |   |
| Perform visual inspection on samples and | indicate if their integrity is acceptable.   |                                  | Is the donor sample usable<br>Acceptable<br>Grossly Haemolysed Samples<br>Samples Leaked | ٦ |
| Is the patient cells sample testable?    | Is the patient serum sample testable?        |                                  | Label Smudged / Not Readable   |   |
| Intrument Broken / Malfunctioned V       | Intrument Broken / Malfunctioned             |                                  | Not Labelled<br>Empty Tube<br>Incorrect Sample   |   |
| Is the donor sample 1 testable?          | Is the donor sample 2 testable?              | Is the donor sample 3 testable?  | Intrument Broken / Malfunctioned   |   |
| Intrument Broken / Malfunctioned         | Intrument Broken / Malfunctioned ~           | Intrument Broken / Malfunctioned | ~ Acceptable   | v |
| Are any samples in the set testable?     |  |                                  |  |   |
| 🔿 Yes 💿 No                               |  |                                  |  |   |
| Testa                                    |  |                                  |  |   |
| Tests                                    |  |                                  |  |   |

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".

| SANBS Proficiency System × +             |   | 0          |            | – a ×            |
|--|---|------------|------------|------------------|
| LIARRA CLIACK THA LARDIT DRIOM TO ALIP   | ntelectprojects.co.za/Crossmatch/CrossmatchProf<br>ore mail may were captured conrecuy.<br>d that the results are correct, or "Back" if you nee |            | 33         | * <b>e</b> :     |
| Participant Number                       |   |            |            |                  |
| P-01005                                  |   |            |            |                  |
| Proficiency Set Information              | 1   |            |            |                  |
| Proficiency Program                      | Proficiency Set   | Issue Date | Due Date   |                  |
| Crossmatch                               | BPT04/21-2  | 2021-04-06 | 2021-04-28 |                  |
| Sample Integrities                       |   |            |            |                  |
| Patient Cell Sample Integrity            | Patient Serum Sample Integrity  |            |            |                  |
| Intrument Broken / Malfunctioned         | Intrument Broken / Malfunctioned  |            |            |                  |
| Reason                                   |   |            |            |                  |
| Please enter a reason indicating why the | e proficiency set was not testable.   |            |            |                  |
|  | *   |            |            |                  |
|  |   |            |            |                  |
| Confirm Untestable Back                  |   |            |            |                  |
| P Type here to search                    | o 🖽 😂 👩 🛛   | - 5a wii 🕰 | A 🗣 9      | ■ 🧖 ¢× 1:29 PM 🔤 |

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

| Confirm Results Submission  |
|---|
| You have submitted the BPT02/14-28 proficiency set for the Crossmatch form. Click here to go back to your homepage. |

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

| nfo@sanbs-proficiency.org.za <in<br>Reply-To: proficiency@sanbs.org.za<br/>fo: renetha.b+21@gmail.com</in<br> | o@sanbs-proficiency.org.za>             | Tue, Jul 21, 2015 at 11:01 AM |
|---|---|-------------------------------|
| SANBS Official Email  |   |                               |
| Dear: P-00083   |   |                               |
| Congratulations you have complete   | d the Crossmatch proficiency with the I | BPT02/14-28 proficiency set.  |
| You captured the following results:   |   |                               |
| Date of Testing   | 2015/07/21 12:00:00 AM                  |                               |
| Method Used   | Manual                                  |                               |
| Sample Integ  | rities                                  |                               |
| 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 Pos                                   |                               |
| DAT   | Negative                                |                               |
| Screening 1   | Negative - IAT                          |                               |
| Donor 1   |   |                               |
| Donor 1 Blood Group   | O Pos                                   |                               |
| Donor 1 IAT Results   | Negative - IAT                          |                               |
| Donor 1 DAT   | Negative                                |                               |
| Donor 1 Compatible With Patien  |   |                               |
| Donor 2   |   |                               |
| Donor 2 Blood Group   | O Pos                                   |                               |
| Donor 2 IAT Results   | Negative - IAT                          |                               |
| Donor 2 DAT<br>Donor 2 Compatible With Patien   | Negative                                |                               |
| Donor 2 Compatible With Patien  |   |                               |
| Donor 3 Blood Group   | O Pos                                   |                               |
| Donor 3 IAT Results   | Negative - IAT                          |                               |
| Donor 3 DAT   | Negative                                |                               |
| Donor 3 Compatible With Patien  |   |                               |
| Donor 4   |   |                               |
| Donor 4 Blood Group   | O Pos                                   |                               |
| Donor 4 IAT Results   | Negative - IAT                          |                               |
| Donor 4 DAT   | Negative                                |                               |

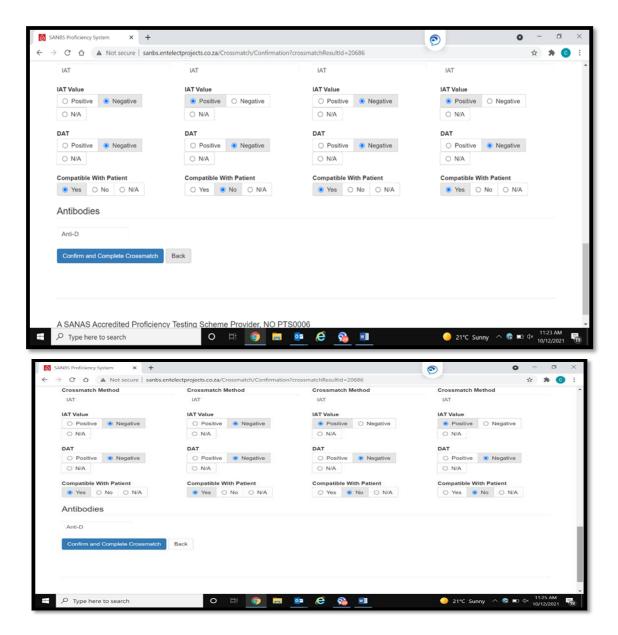
10.21. The following will appear on the Proficiency Programme Dash screen. If you have realised with the "Confirmation" e-mail that a mistake was made on entering of results, the result can be edited until the closing date of that Proficiency. Click on "View/Edit Crossmatch Proficiency".

| SANBS Proficiency Home - Partic                                      | ipants Enrolment       | Reports Log A Ticket | Request Move | Administration - | FAQ   |                |   |
|--|------------------------|----------------------|--------------|------------------|---|----------------|---|
|  |                        |                      |              |                  | Logged in as P-01269<br>(Institution: NHLS Baragwanath) | Sign out SANBS | 5 |
| Participant Management   |                        |                      |              |                  |   |                |   |
| Click on the link below to add, edit or remov<br>Manage Participants | e participants from yo | ur institution.      |              |                  |   |                |   |
| You have a completed proficiency.                                    |                        |                      |              |                  |   |                |   |
| Please click on the link below to continue.                          |                        |                      |              |                  |   |                |   |
| View/Edit Crossmatch Proficiency                                     |                        |                      |              |                  |   |                |   |
| [  |                        |                      |              |                  |   |                |   |
|  |                        |                      |              |                  |   |                |   |
|  |                        |                      |              |                  |   |                |   |
|  |                        |                      |              |                  |   |                |   |

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

| SANBS Proficiency | Home +       | Participants | Enrolment | Reports   | Log A Ticket | Request Move | Administration + | FAQ   |          |       |
|-------------------|--------------|--------------|-----------|-----------|--------------|--------------|------------------|---|----------|-------|
|                   |              |              |           |           |              |              |                  | Logged in as P-01269<br>(Institution: NHLS Baragwanath) | Sign out | SAMES |
| Choose a cor      | npleted s    | et to view/e | edit      |           |              |              |                  |   |          |       |
| Proficiency Set:  |              |              |           |           |              |              |                  |   |          |       |
| BPT10/21-266      |              |              |           |           |              |              |                  |   |          | ~     |
| Continue          |              |              |           |           |              |              |                  |   |          |       |
|                   |              |              |           |           |              |              |                  |   |          |       |
|                   |              |              |           |           |              |              |                  |   |          |       |
| A SANAS Accredite | ed Proficien | cy Testing S | cheme Pro | ovider, N | O PTS0006    | 5            |                  |   |          |       |
|                   |              |              |           |           |              |              |                  |   |          |       |
|                   |              |              |           |           |              |              |                  |   |          |       |
|                   |              |              |           |           |              |              |                  |   |          |       |

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".

| Patient               |                         |                       |   |                         |   |
|-----------------------|-------------------------|-----------------------|---|-------------------------|---|
| Blood Group           | DAT                     |                       |   |                         |   |
| O Neg                 | ✓ ○ Positive            | Negative O N/A        |   |                         |   |
| Antibody Screening    |                         |                       |   |                         |   |
| Method                | Result                  |                       |   |                         |   |
| IAT                   | ✓ ● Positive ○ Negative |                       |   |                         |   |
|                       | O N/A                   |                       |   |                         |   |
| _                     |                         |                       |   |                         |   |
| Donor 1               | Donor 2                 | Donor 3               | [ | Donor 4                 |   |
| Blood Group           | Blood Group             | Blood Group           | E | Blood Group             |   |
| O Neg                 | ∽ O Neg                 | ~ O Pos               | ~ | O Pos                   | ~ |
| Crossmatch Method     | Crossmatch Method       | Crossmatch Method     | c | Crossmatch Method       |   |
| IAT                   | ∽ IAT                   | ~ IAT                 | ~ | IAT                     | ~ |
| IAT Value             | IAT Value               | IAT Value             | L | AT Value                |   |
| O Positive   Negative | O Positive   Negative   | Positive     Negative |   | Positive     O Negative | 1 |
| 0 N/A                 | 0 N/A                   | O N/A                 |   | 0 N/A                   |   |
| DAT                   | DAT                     | DAT                   |   | ТАТ                     |   |
| O Positive   Negative | Positive     Negative   | O Positive   Negative |   | Positive     Negative   |   |

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.

| ANIS Preficancy System × +<br>→ C Ó A Not secure   sands entelectprojects co.za/Proficiency/Success/proficiency/Resultid=34317 | 0   | 0 - 0<br>9 # 0 |
|--|---|----------------|
| SANBS Proficiency Home - Perioquelis Environet Reports Log A Toket Request Move Administration                                 | n + FAQ<br>Legged in as P-00032<br>(Institution: TEMBIEA BLOOD BANK | Barret 🙆       |
| Confirm Results Submission   |   |                |
| You have submitted the BPT10/21-250 proficiency set for the Crossmatch form. Click here to go back to your homepage.           |   |                |
|  |   |                |
|  |   |                |
| A SANAS Accredited Proficiency Testing Scheme Provider, NO PTS0006   |   |                |
|  |   |                |
|  |   |                |
|  |   |                |
|  |   |                |

| Dear: P-01269   |  |
|---|--|
| Congratulations you have compl<br>BPT10/21-266 proficiency set. | eted the Crossmatch proficiency with the |
| You captured the following result                               | S:                                       |
| Date of Testing   | 2021/10/12 00:00:00                      |
| Method Used   | Manual                                   |
| Sample Integr   | ities                                    |
| 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 condition                                | sno                                      |
|   |  |

- 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.
- b. Proficiencies Outstanding: Number of proficiencies outstanding per Institution.
- c. Proficiency Results Summary: Summary of proficiency with % passed and failed.
- d. 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.

|  | SANBS Proficiency | Home 👻 | Participants | Enrolment | Reports | Administration - | FAQ |
|--|-------------------|--------|--------------|-----------|---------|------------------|-----|
|--|-------------------|--------|--------------|-----------|---------|------------------|-----|

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:

| Proficiency             | Participant     |            | Proficiency Set Bat  | tch   | Hemocue Instrument               |   |
|-------------------------|-----------------|------------|----------------------|---|----------------------------------|---|
| All                     | All             | ~          | All                  | ~   | All                              | 8 |
| Created Date From       | Created Date To |            |                      |   |                                  |   |
|                         |                 |            |                      |   |                                  |   |
| Filter                  |                 |            |                      |   |                                  |   |
|                         |                 |            |                      |   |                                  |   |
| Report Type             | Version Number  | Created On | Status               | Approver  | Applies to                       |   |
| Proficiencies Completed | 1               | 2015-06-04 | Approved             | Niekerk, Truscha  | Crossmatch<br>SANBS              |   |
|                         |                 |            |                      | display everything for  | Ermelo Blood Bank                |   |
|                         |                 |            | the Institution and  |   | BP102/14                         |   |
|                         |                 |            | Supervisors/Manage   | ers   | From 2015-01-01<br>To 2015-12-31 |   |
| Proficiencies Completed | 1               | 2015-06-04 | Approved             | Niekerk, Truscha  | Crossmatch                       |   |
|                         |                 |            | Papart content will  | display everything for  | SANBS                            | 1 |
|                         |                 |            |                      | and can be viewed by  |                                  |   |
|                         |                 |            | Supervisors/Manag    | ers and relevant  | BPT02/14                         |   |
|                         |                 |            | participant e.g. P-0 | and a share of the second s | From 2015-01-01                  |   |

11.4. Reports can be filtered by the following:

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

| roficiency   | Participant     |   | Proficiency Set Batch |  |
|--|-----------------|---|-----------------------|--|
| All<br>Antibody Identification                     | IIA             | ~ | All                   |  |
| Crossmatch<br>Donation Testing                     | Report Type     |   |                       |  |
| Hemocue<br>HLA and Platelet Antibodies<br>Virology | All             | ~ |                       |  |
| reated Date From                                   | Created Date To |   |                       |  |
| 01   | Created Date To | = |                       |  |

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

| Proficiency        |   | Participant     |   | Proficiency Set Batch |
|--------------------|---|-----------------|---|-----------------------|
| Crossmatch         | ~ | All             | ~ | BPT05/18 V            |
| Hemocue Instrument |   | Report Type     |   |                       |
| All                | ~ | All             | ~ |                       |
| Created Date From  |   | Created Date To |   |                       |
|                    | = |                 |   |                       |

• 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<br>SANBS<br>Chris Hani Baragwanath Blood Bank<br>BPT05/18<br>From 2018-01-01<br>To 2018-12-31            |
|----------------------------|---|------------|----------|-------------------|---|
| Proficiency Result Summary | 1 | 2018-06-07 | Approved | Simelane, Pontsho | Crossmatch<br>SANBS<br>Chris Hani Baragwanath Blood Bank<br>BPT05/18<br>From 2018-01-01<br>To 2018-12-31            |
| Participants Results       | 1 | 2018-06-07 | Approved | Simelane, Pontsho | Crossmatch<br>SANBS<br>Chris Hani Baragwanath Blood Bank<br>BPT05/18<br>From 2018-01-01<br>To 2018-12-31            |
| Participants Results       | 1 | 2018-06-07 | Approved | Simelane, Pontsho | Crossmatch<br>SANBS<br>Chris Hani Baragwanath Blood Bank<br>P-01385<br>BPT05/18<br>From 2018-01-01<br>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.

| Proficiency Result Summary Report  |             |                |  |  |  |  |  |
|--|-------------|----------------|--|--|--|--|--|
| Details  |             |                |  |  |  |  |  |
| Report Type  | Status      | Created Date   |  |  |  |  |  |
| Proficiency Result Summary   | Approved    | 2018-06-07     |  |  |  |  |  |
| Approved By  | Approved On | Version Number |  |  |  |  |  |
| Simelane, Pontsho  | 2018-06-07  | 1              |  |  |  |  |  |
| Applies To<br>Crossmatch<br>SANBS<br>Chris Hani Baragwanath Blood Bank<br>BPT05/18<br>From 2018-01-01<br>To 2018-12-31<br>View Download Back |             |                |  |  |  |  |  |

- 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:
  - a. The serial number of all new Instruments with the relevant instrument details must be added to the Proficiency System, by the Primary Participant.
  - b. Any changes in the instrument status will be performed by the Primary Participant.
- 12.2. To add an instrument to the proficiency system.
  - a. Log onto the Proficiency system.
  - b. Click on the "Administration" option.
  - c. Select the Type of Instrument option by example Crossmatch Instrument.

| Proficiency Sets |
|------------------|
|------------------|

#### 12.3. On the following screen click on the "Add" button.

| Crossmatch Instru               | uments  |    |            |   |
|---------------------------------|---------|----|------------|---|
| Fields marked with an * are red | quired. |    |            |   |
| Serial Number                   | Туре    | li | nstitution |   |
|                                 | All     | ~  | All        | ~ |

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

| Details                      |  |  |
|------------------------------|--|--|
| Serial Number<br>054-0001822 | Type<br>Grifols DG Gel Semi-Automated System |  |

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".

| Details                         |                                      |             |                    |
|---------------------------------|--------------------------------------|-------------|--------------------|
| Serial Number                   | Туре                                 | Institution |                    |
| 054-0001822                     | Grifols DG Gel Semi-Automated System |             |                    |
| Edit Assign To Institution Back |                                      |             | Add New Instrument |

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".

| Crossmatch Instrum          | ent                                  |                 |            |
|-----------------------------|--------------------------------------|-----------------|------------|
| Details                     |                                      |                 |            |
| Serial Number               | Туре                                 | Institution     |            |
| 054-0001822                 | Grifols DG Gel Semi-Automated System | Quality Control |            |
| Edit Back Unassign From Ins | titution                             | Add New         | Instrument |
|                             |                                      |                 |            |
|                             |                                      |                 |            |
|                             |                                      |                 |            |

| Institution           |
|-----------------------|
| Semi-Automated System |
| Add New Instrument    |
|                       |

- 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.

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# 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

| 3610011.          |                     |           |         |                  |       |
|-------------------|---------------------|-----------|---------|------------------|-------|
| SANBS Proficiency | Home - Participants | Enrolment | Reports | Administration - | FAQ . |

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

| Proficiency        |   | Participant                   |   | Proficiency Set Batch |   |
|--------------------|---|-------------------------------|---|-----------------------|---|
| All                | ~ | All                           | ~ | All                   | ~ |
| Hemocue Instrument |   | Report Type                   |   |                       |   |
| All                | ~ | Certificates Of Participation | ~ |                       |   |
| Created Date From  |   | Created Date To               |   |                       |   |
|                    | = |                               | = |                       |   |

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

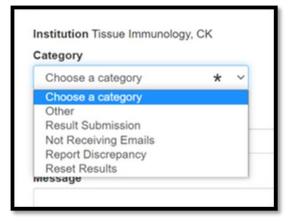
- 14.1. "Log A Ticket" option has been installed onto the SANBS Proficiency System to assist participants with a platform for reporting problems encountered on the system.
- 14.2. When a problem is, being encountered click on the "Log A Ticket" on the Dashboard screen.

| SANBS Proficiency | Home - | Participants | Enrolment | Reports | Log A Ticket | Administration - | FAQ  |          |
|-------------------|--------|--------------|-----------|---------|--------------|------------------|--|----------|
|                   |        |              |           |         |              |                  | Logged in as P-00459<br>(Institution: Chris Hani Beragwanath Blood Bank) | Sign out |

14.3. The following screen will appear

| SANBS Proficiency System × +   |                    |       |         |  | ~ - O                 | ×  |
|--|--------------------|-------|---------|--|-----------------------|----|
| $\leftarrow$ $\rightarrow$ $\mathcal{C}$ $\bigtriangleup$ Not secure   sanbs.entelectproject | s.co.za/Ticket/Log |       |         |  | ie 🖈 🛊 😫              | 1  |
|  |                    |       |         | Logged in as P-01482<br>(Institution: Tissue Immunology, CK) | Sign out SANES        | Â  |
| 별 Log A Ticket   |                    |       |         |  |                       | ٢  |
| Fields marked with an * are required.  |                    |       |         |  |                       |    |
| Institution Tissue Immunology, CK<br>Category<br>Choose a category * ~                       |                    |       |         |  |                       |    |
| Choose a category 🗙 🗸  |                    |       |         |  | *                     |    |
| Message  |                    |       |         |  | ^                     | J  |
| Log Cancel   |                    |       |         |  | *//                   | *  |
| ⊕ Type here to search     ■  | o II 🤇             | ) 📃 🔯 | e 💿 🏳 🧕 | 🧕 🔳 🛛 🗢 26°C 🔨 🖡 🦿   | 1:31 PM<br>12/13/2021 | 20 |

INF-QCL-015 1043876 REV 7 (??/??/??) Page 26 of 32 14.4. Select the category related to the problem encountered.



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

| Institution Tissue Immunolo  | gy, CK                 |   |   |  |  |
|--|------------------------|---|---|--|--|
| Report Discrepancy   | ~                      |   |   |  |  |
| Proficiency  |                        | Proficiency Set Batch                               |   |  |  |
|  |                        |   |   |  |  |
| Crossmatch Description There's an issue regarding th                                 | ← reports being inacc  | BPT11/21 curate and/or not what is expected         | ~ |  |  |
| Description  |                        | BPT11/21<br>•<br>curate and/or not what is expected | ~ |  |  |
| Description<br>There's an issue regarding the  | ne reports being inacc | •   | v |  |  |
| Description<br>There's an issue regarding th<br>Subject                              | ne reports being inacc | •   | v |  |  |
| Description<br>There's an issue regarding th<br>Subject<br>Crossmatch Proficiency BP | ne reports being inacc | curate and/or not what is expected                  | ~ |  |  |

- 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.

| SANBS Proficiency System × +                                 | v – d                                |
|--|--------------------------------------|
| → C △ ▲ Not secure   sanbs.entelectprojects.co.za/Ticket/Log | Cogged at as t-o trioz Sight out (Ky |
|  | (Institution: Tissue Immunology, CK) |
|  |                                      |
| 📕 Log A Ticket   |                                      |
|  |                                      |
| Fields marked with an * are required.                        |                                      |
| Institution Tissue Immunology, CK                            |                                      |
| Category   |                                      |
| Other v  |                                      |
| Description  |                                      |
| Ticket category does not fall under specified category       |                                      |
| Subject  |                                      |
| Crossmatch Proficiency BPT11/21 set 3                        |                                      |
| Message  |                                      |
| Crossmatch Proficiency BPT11/21 set 3 Testing test system    |                                      |
|  |                                      |

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.

| NBS Intranet | 🛤 SANG         | 15 Proficiency | System ×      | <b>.</b>    |            |              |                |                |  |                |
|--------------|----------------|----------------|---------------|-------------|------------|--------------|----------------|----------------|--|----------------|
| SANBS Prof   | iciency        | Home 👻         | Participants  | Enrolment   | Reports    | Log A Ticket | Ticket History | Administration | - FAQ  |                |
|              |                |                |               |             |            |              |                |                | Logged in as P-00001<br>(Institution: Rustenburg Blood Bank) | Sign out SANES |
| Your ticket  | was logged     | succesfull     | y.            |             |            |              |                |                |  |                |
| Thank you fo | r submitting y | our Ticket.    | Your referenc | e number is | ##T00081   |              |                |                |  |                |
|              |                |                |               |             |            |              |                |                |  |                |
|              |                |                |               |             |            |              |                |                |  |                |
|              |                |                |               |             |            |              |                |                |  |                |
| A SANAS A    | ccredited F    | Proficienc     | v Testing     | Scheme P    | rovider, N | NO PTS0006   | 3              |                |  |                |
|              |                |                | , ,           |             |            |              |                |                |  |                |
|              |                |                |               |             |            |              |                |                |  |                |
|              |                |                |               |             |            |              |                |                |  |                |
|              |                |                |               |             |            |              |                |                |  |                |

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

| Participant Management   |                            |  |  |  |  |  |  |  |
|--|----------------------------|--|--|--|--|--|--|--|
| Click on the link below to add, edit or remove participants from your institution. |                            |  |  |  |  |  |  |  |
| Manage Participants  |                            |  |  |  |  |  |  |  |
|  |                            |  |  |  |  |  |  |  |
| To-Do List   |                            |  |  |  |  |  |  |  |
| C Add participants to institution  |                            |  |  |  |  |  |  |  |
| C Enrol for a proficiency  |                            |  |  |  |  |  |  |  |
|  |                            |  |  |  |  |  |  |  |
| My Open Tickets  |                            |  |  |  |  |  |  |  |
| The following list of Tickets are unassigned.                                      |                            |  |  |  |  |  |  |  |
| Reference  | Subject                    |  |  |  |  |  |  |  |
|  | Report incorrect - Example |  |  |  |  |  |  |  |
| #T00564  |                            |  |  |  |  |  |  |  |

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

| Logged by                   | Shuping, Pontsho  | Logged At  | Friday, March 12, 2021 11:53:01 AM            |
|-----------------------------|---|--|---|
| Institution                 | Quality Control   | Email Address  | proficiency@sanbs.org.za                      |
| Ticket Details              |   |  |   |
|                             |   |  |   |
|                             |   |  |   |
| Report in                   | ncorrect - Example  |  |   |
|                             | · ·   | out out has failed the following particle  | at Diversion Could this places he leaked at   |
| The Partici                 | pant report from the BPT/ proficien   |  | int; P-xxxxxx. Could this please be looked at |
| The Partici                 | pant report from the BPT/ proficien   | cy test has failed the following participa<br>xxxx, at the following Blood Bank, |   |
| The Partici                 | pant report from the BPT/ proficien   |  |   |
| The Partici                 | pant report from the BPT/ proficien   |  |   |
| The Partici<br>and could    | pant report from the BPT/ proficien<br>we please be advised. Participant P-x: |  |   |
| The Partici<br>and could of | pant report from the BPT/ proficien<br>we please be advised. Participant P-x: |  |   |

| Ticket Comments From Participant                                   |  |
|--|--|
| Add a Ticket Comment   |  |
| Comment Message  |  |
| Add Comment  |  |
| Add Comment  |  |
|  |  |
| A SANAS Accredited Proficiency Testing Scheme Provider, NO PTS0006 |  |

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



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.

| SA                       | IBS Intranet x 🕅 SANBS Proficiency System x +  | - Ø ×                           |
|--------------------------|--|---------------------------------|
| $\leftarrow \rightarrow$ | C 🛆 🔒 sanbs-proficiency.org.za/Ticket/MyTicket?ticketId=564  | 🖈 🚭 E                           |
|                          |  | ^                               |
|                          |  |                                 |
|                          | Ticket Notes From Proficiency  |                                 |
|                          |  |                                 |
|                          | Note Created On : Saturday, March 13, 2021 3:24:37 PM  |                                 |
|                          | This note is to display the communication between proficiency Coordinator and participant. Logged By McGorrell, Yvette on 2021-03-13 |                                 |
|                          | Note Created On : Friday, March 12, 2021 12:24:59 PM   |                                 |
|                          |  |                                 |
|                          | Ticket has been allocated to coordinator McGorrell, Yvette on 2021-03-12   |                                 |
|                          | Note Created On : Friday, March 12, 2021 11:53:01 AM   |                                 |
|                          |  |                                 |
|                          | Ticket created on 2021-03-12 by Shuping, Pontsho   |                                 |
|                          |  |                                 |
|                          | Ticket Comments From Participant   |                                 |
|                          |  |                                 |
|                          | Add a Ticket Comment   |                                 |
|                          | O Type here to search O 🖾 🥭 🧕 📴 📻 😘 💷  | ^ 🖲 🖿 🖬 🕸 529 PM<br>3/13/2021 😼 |

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

| SAN                      | 8S Intranet       | × 🔯 SANBS Pro                | ficiency System     | × +      | 2  |           |     | ( | 9 | -  | ٥ | × |
|--------------------------|-------------------|------------------------------|---------------------|----------|----|-----------|-----|---|---|----|---|---|
| $\leftarrow \rightarrow$ | C 0 #             | sanbs-proficiency.org.za/Ti  | cket/MyTicket?tick  | etid=564 |    |           |     |   |   | \$ | • | : |
|                          | Note Created C    | On : Friday, March 12, 2021  | 12:24:59 PM         |          |    |           |     |   |   |    |   | - |
|                          | Ticket has been   | n allocated to coordinator M | cGorrell, Yvette or | 2021-03  | 12 |           |     |   |   |    |   |   |
|                          | Note Created C    | On : Friday, March 12, 2021  | 11:53:01 AM         |          |    |           |     |   |   |    |   |   |
|                          | Ticket created of | on 2021-03-12 by Shuping,    | Pontsho             |          |    |           |     |   |   |    |   |   |
|                          | Ticket Comm       | ents From Participant        |                     |          |    |           |     |   |   |    |   |   |
|                          | Add a Tic         | ket Comment                  |                     |          |    |           |     |   |   |    |   |   |
|                          | Comment Mess      | age                          |                     |          |    |           |     |   |   |    |   |   |
|                          |                   |                              |                     |          |    |           |     |   |   |    |   |   |
|                          |                   |                              |                     |          | )  | Add Comme | ent |   |   |    |   |   |
|                          |                   |                              |                     |          |    |           |     |   |   |    |   |   |
|                          |                   |                              | _                   | _        |    |           |     |   |   |    |   | * |

| <b>0</b> sa | 85 Intranet 🗴 🔣 SANBS Proficiency System 🗴 🕂                             | - σ ×                                      |
|-------------|--|--|
| ← -)        | C Ó é sanbs-proficiency.org.za/Ticket/MyTicket/ticketid=564              | x 🔁 1                                      |
|             | Note Created On : Friday, March 12, 2021 12:24:59 PM                     |  |
|             | Ticket has been allocated to coordinator McGorrell, Yvette on 2021-03-12 |  |
| L           | Note Created On : Friday, March 12, 2021 11:53:01 AM                     |  |
| L           | Ticket created on 2021-03-12 by Shuping, Pontsho                         |  |
|             | Ticket Comments From Participant   |  |
| L           | Add a Ticket Comment   |  |
| L           | Comment Message  |  |
|             | Comment added to show communication between Participant and coordinator. |  |
| L           | Add Comment  |  |
|             |  |  |
| 4           | P Type here to search O 🗄 🩋 👰 🛤 🚮 💁                                      | ^ ® ■ ∡ Φ <sup>S41 PM</sup><br>3/13/2021 😡 |

14.12.Resolved tickets will appear under "My Closed Ticket".

| sa 🚯 | ANBS Intranet X SANBS Proficiency                                | System × +                    | 9        | - ø ×                              |
|------|--|-------------------------------|----------|------------------------------------|
| ← →  | C A a sanbs-proficiency.org.za/Notificat<br>Manage Participants  | tion                          |          | * 🚭 :                              |
|      | To-Do List   |                               |          |                                    |
|      | 心 Add participants to institution<br>心 Enrol for a proficiency   |                               |          |                                    |
|      | My Closed Tickets  |                               |          |                                    |
|      | The following list of Tickets are closed and requir<br>Reference | re your attention.<br>Subject |          |                                    |
|      | #T00564  | Report incorrect - Example    |          |                                    |
|      |  |                               |          |                                    |
|      |  |                               |          |                                    |
|      | A SANAS Accredited Proficiency Testing                           | Scheme Provider, NO PTS0006   |          |                                    |
| 4    | 𝒫 Type here to search  | o # ၉ 💿 📭 🛒                   | <u>)</u> | 🗣 🖿 🖌 ф. 😽 552 РМ<br>3/13/2021 🛛 😼 |

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.

| SANI | BS Intranet   | × 👩 SANBS Proficiency System × +                     |                            | 0   | -             | 0 | ×   |  |
|------|---|--|----------------------------|---|---------------|---|-----|--|
| ← →  | C 🛆 🔒 sanbi   | s-proficiency.org.za/Ticket/MyClosedTicket?ticketid= | 564                        | U.  | \$            | 0 | 1   |  |
|      | Participant Details   |  |                            |   |               |   |     |  |
|      | Logged by<br>Institution  | Shuping, Pontsho<br>Quality Control                  | Logged At<br>Email Address | Friday, March 12, 2021 11:53:01 AM proficiency@sanbs.org.za |               |   |     |  |
|      | Has the ticket bee  | n resolved according to your knowledge?              |                            |   |               |   |     |  |
|      | Yes<br>Confirm Reso   | lution   | No<br>Leave A Comm         | ent   |               |   |     |  |
|      | Ticket Details  |  |                            |   |               |   |     |  |
|      | Report incorrect - Example<br>The Participant report from the BPT/ proficiency test has failed the following participant; P-xxxxxx. Could this please be looked at<br>and could we please be advised. Participant P-xxxxx, at the following Blood Bank, |  |                            |   |               |   |     |  |
| - 2  | <sup>1</sup><br>Type here to sear   | ch O 🛱 🧲   | a 🙃 📂 🗛 🗊                  | ~ 1   | ■ ∡ (× \$54 P | M | 112 |  |

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.

| SANBS Intranet   | × 👸 SANBS Proficiency Sy  | ystem × +                 |                  | 9         | - (                |            |  |  |
|--|---|---------------------------|------------------|-----------|--------------------|------------|--|--|
| $\leftrightarrow$ $\rightarrow$ $C$ $\triangle$          | â sanbs-proficiency.org.za/Ticket/Unr   | esolvedTicket?ticketId=56 | 4                | -         | *                  | 💮 E        |  |  |
|  |   |                           |                  |           |                    | ^          |  |  |
|  |   |                           |                  |           |                    |            |  |  |
| Ticket (   | comments From Participant   |                           |                  |           |                    |            |  |  |
| Comment Created On : Saturday, March 13, 2021 3:41:22 PM |   |                           |                  |           |                    |            |  |  |
| Comme  | Comment added to show communication between Participant and coordinator. Logged By Shuping, Pontsho on 2021-03-13 |                           |                  |           |                    |            |  |  |
|  |   |                           |                  |           |                    |            |  |  |
|  |   |                           |                  |           |                    |            |  |  |
| Pleas  | Please indicate how we can be of further assistance   |                           |                  |           |                    |            |  |  |
|  |   |                           |                  |           |                    | - 1        |  |  |
| Message  |   |                           |                  |           |                    |            |  |  |
|  |   |                           |                  |           |                    |            |  |  |
|  |   | Add (                     | Comment and ReOr | on Tickot |                    |            |  |  |
| Add Comment and ReOpen Ticket                            |   |                           |                  |           |                    |            |  |  |
|  |   |                           |                  |           |                    |            |  |  |
|  |   |                           |                  |           |                    |            |  |  |
|  |   |                           |                  |           | E-60 M             |            |  |  |
| E 2 Type I   | ere to search   | o 🖄 😂 🛛                   | 💿 💁 📻 (          |           | ∧ 📭 🖬 🚽 d× 5:59 PM | 4<br>21 20 |  |  |

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<br>NUMBER | REVISION DETAILS  |  |  |  |  |  |  |
| 7                 | Updated 10.3. The Instruction sheet as an attachment with "Proficiency Set Ready" e-mail. |  |  |  |  |  |  |