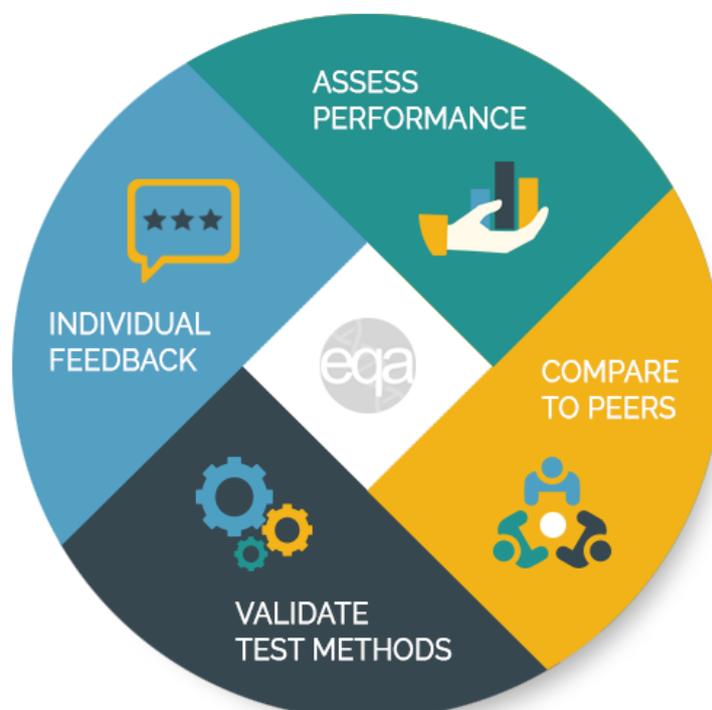


## Instructions manual – New website EQA schemes

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## 1. General information & quick guide

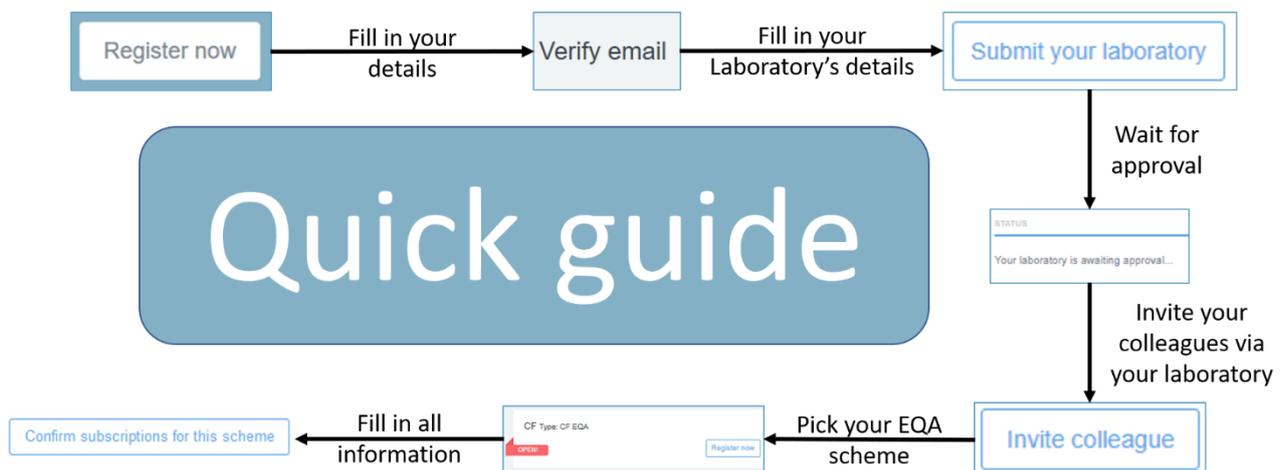
This document contains more information on the registration process and how to enroll in a scheme. You will be able to make a new, personal account and an account for the laboratory you work in. When your laboratory account has been approved, other people can be invited to join that laboratory and make their own personal account that is linked to the laboratory.

The CF Network EQA scheme is the first to be able to test this new website application, so do let us know if any errors come up or something is unclear to you. Once this scheme is running smoothly, our other EQA schemes will be transferred as well and you will be able to keep track of all our EQA schemes you are participating in from one website and with one account.

You can retrieve all data from previous participations from [www.cf.eqascheme.org](http://www.cf.eqascheme.org). It will be available for another year for you to download.

- Website: [www.eqascheme.org](http://www.eqascheme.org)
- Registration period for the CF 2020 scheme: **03 SEP 2019 - 29 NOV 2019**
- The registration fee is **EUR 275**
- The CF Network EQA scheme for 2020 will have the same set-up where three case samples will be sent to you for analysis and you will send in your answers and reports online.

We hope you will join us in our enthusiasm to improve our service for quality assurance of diagnostic laboratories.



## 2. Signing up on our website

There are five steps in the signing up process. Not everyone will need to go through all steps, so you can skip the steps that you and your laboratory do not need:

- Step 1: Creating your personal account
- Step 2: Creating a laboratory on our website
- Step 3: Participating in multiple laboratories
- Step 4: Inviting colleagues to a laboratory
- Step 5: Accessing all your information

### 2.1 How to create an account

In the first step of signing up to our website, a personal account will need to be created. If you are the first of your laboratory to sign up, you should follow the steps below. If one of your colleagues has already signed up, they can help you by inviting you to the laboratory, see step 2.4.1.

As the first person of your laboratory to sign up for our website, you need to make a personal account first. You will sign up with this account whenever you need access to information about any EQA scheme you participate in for any laboratory you are part of. To submit result, you will also sign in with this account.

To make your personal account, follow the instructions below:

- Go to our webpage: [www.eqascheme.org](http://www.eqascheme.org).
- Click “**Register now**” on our homepage (see Figure 1).

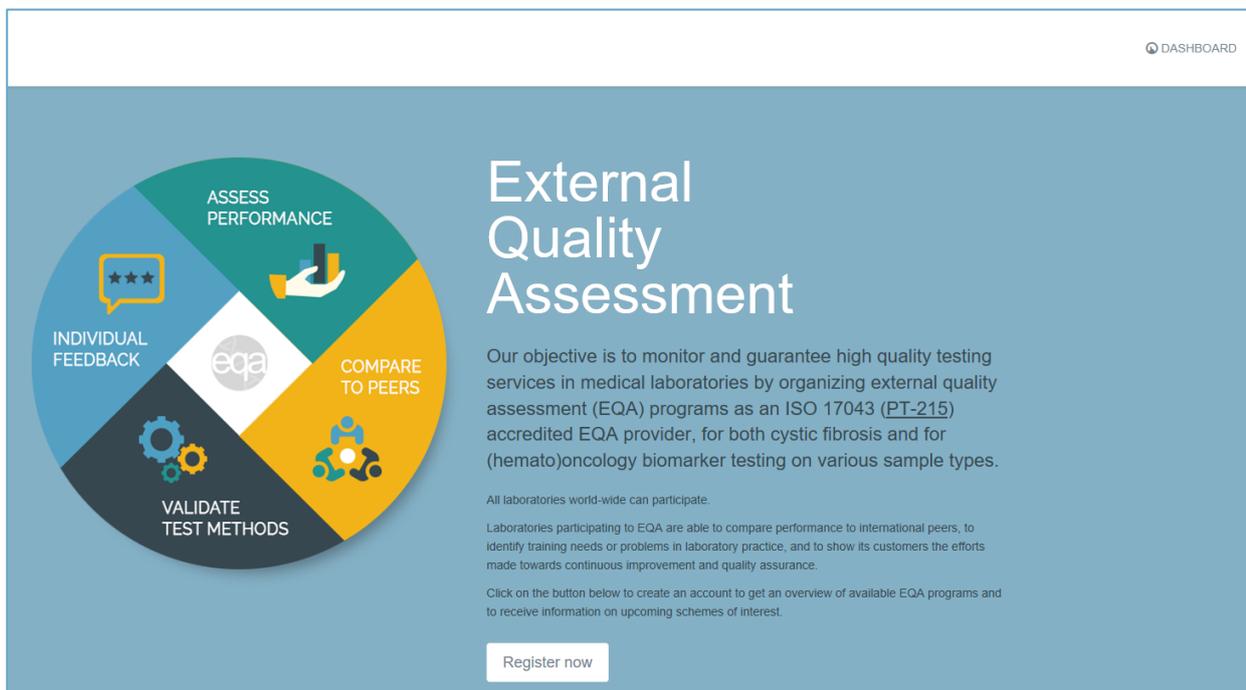
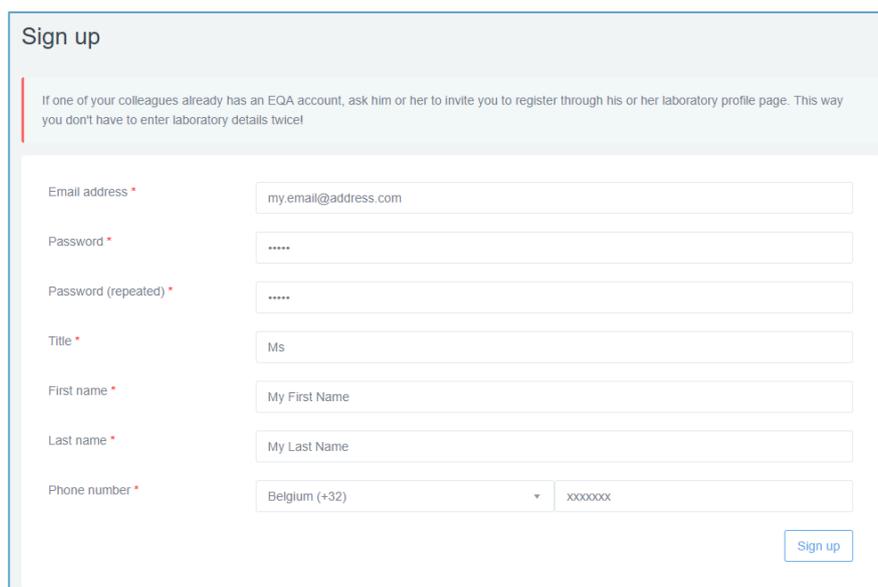


Figure 1: Home page of the new EQA website. Click “Register now” to sign up on our website.

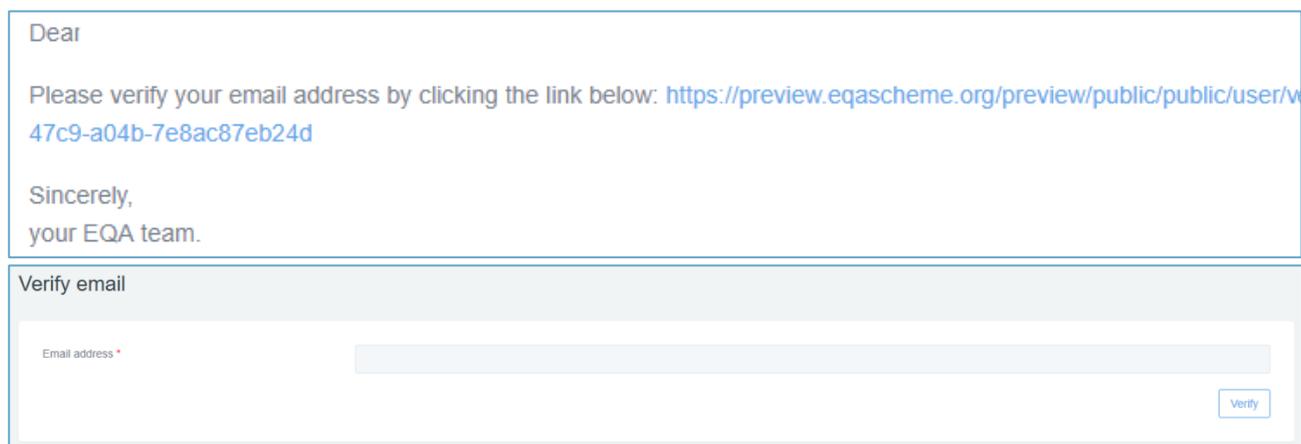
- **Fill out your personal information** in the next screen that appears. When everything is filled out correctly, click “**Sign up**” (see Figure 2). Your title will be used to address you in our emails (for example Dr, Prof, Ms, Mrs or Mr).



The 'Sign up' form contains the following fields: Email address (filled with 'my.email@address.com'), Password (filled with '\*\*\*\*\*'), Password (repeated) (filled with '\*\*\*\*\*'), Title (filled with 'Ms'), First name (filled with 'My First Name'), Last name (filled with 'My Last Name'), and Phone number (country dropdown set to 'Belgium (+32)' and number filled with 'xxxxxxx'). A 'Sign up' button is located at the bottom right.

Figure 2: Fill out your personal information to create a personal account on our new website.

- Once you have signed up, you will need to verify your e-mail address. An email message will be sent to the address you registered during the sign-up process for your account. **Click on the link** in the e-mail message and follow the next steps to continue the process (Figure 3).
- You will be redirected to our website where you can click “**Verify**” to continue.
- Then, you will have created your account and be redirected to your dashboard. This is your personal home page.



The top part shows an email template with the text: 'Dear', 'Please verify your email address by clicking the link below: <https://preview.eqascheme.org/preview/public/public/user/w47c9-a04b-7e8ac87eb24d>', 'Sincerely,', and 'your EQA team.' The bottom part shows a 'Verify email' form with an 'Email address' field and a 'Verify' button.

Figure 3: A verification email will be sent to your email address. Click on the link and click “Verify” to continue the sign-up process.

Once you have a personal account, you can create a laboratory from your account. On your dashboard, you can see your interests and your laboratory on the left side and the schemes you can sign up for on the right side. If you click “**Select interests**”, you can select which EQA schemes you are interested in (Figure 4). You will receive information on the opening of registrations and deadlines for the EQA schemes of your interest.

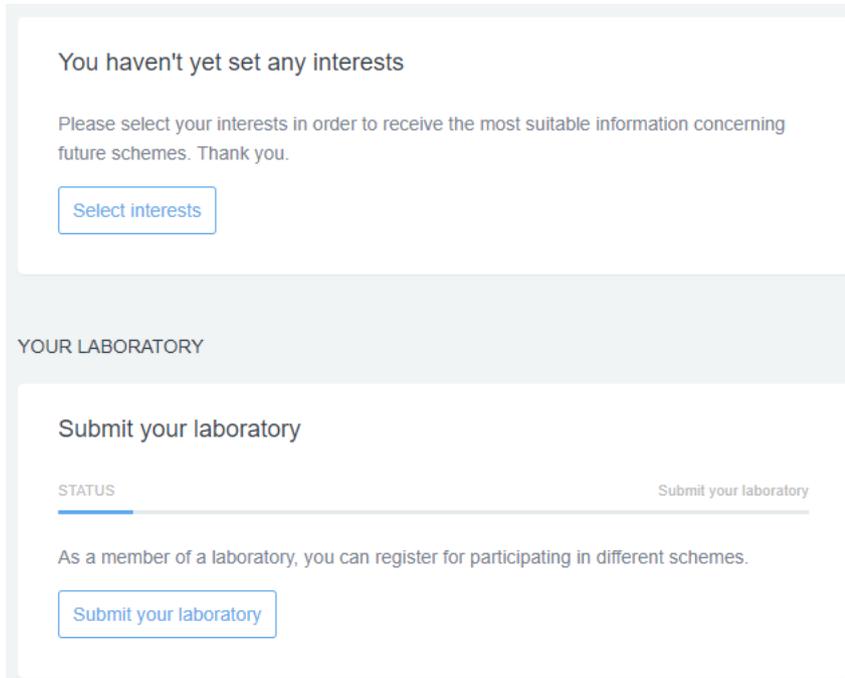
**Make sure to regularly update your interests to not miss any information about upcoming schemes.**

A person cannot sign up for an EQA scheme, a laboratory needs to do that. So, in the next step, a laboratory will be created by the person working in that laboratory. If a colleague already created your laboratory, skip this step and go to 2.4.1.

## 2.2 Creating your laboratory

Before you can register for an EQA scheme, you need to create a laboratory which will be participating. Follow the steps below to create your laboratory:

- Click **“Submit your laboratory”** on the dashboard to start the process (Figure 4).



The screenshot shows a web interface with two main sections. The top section is titled "You haven't yet set any interests" and contains a message: "Please select your interests in order to receive the most suitable information concerning future schemes. Thank you." Below this message is a button labeled "Select interests". The bottom section is titled "YOUR LABORATORY" and contains a sub-section titled "Submit your laboratory". This sub-section has a progress bar with "STATUS" on the left and "Submit your laboratory" on the right. Below the progress bar is a message: "As a member of a laboratory, you can register for participating in different schemes." At the bottom of this sub-section is a button labeled "Submit your laboratory".

Figure 4: To create your laboratory profile, click on “Submit your laboratory” on your dashboard.

- **Fill in your laboratory information** in the next screen. Fill in as much information as possible (Figure 5).

### Registration

If one of your colleagues already has an EQA account, ask him or her to invite you to register through his or her laboratory profile page. This way you don't have to enter laboratory details twice!

<p><b>Details *</b></p>	<p><b>Laboratory *</b></p>	
	Department	<input type="text"/>
	<b>Institute *</b>	<input type="text"/>
	<b>Legal form *</b>	<input type="text" value="other"/>
	Other legal form	<input type="text"/>
	EUGT ID	<input type="text"/>
	Value Added Tax Number	<input type="text"/>
	Website/url	<input type="text" value="https://www.lab.com"/>
<p><b>My function</b></p>	<input type="text" value="My function in the institute"/>	
<p><b>Company address *</b></p>	Building, floor	<input type="text" value="Building, floor, ..."/>
	Street, number, box *	<input type="text" value="Street, number, box, ..."/>
	Extra	<input type="text" value="Extra"/>
	Postal code *	<input type="text" value="Postal code"/>
	City *	<input type="text" value="City"/>
	Country *	<input type="text" value="Belgium"/>

Figure 5: Fill in as much information on the laboratory registration screen to create your laboratory.

- In the next step, you can only **wait**. The EQA coordination center will be confirming your laboratory details before you can move to the next step.

On your dashboard, you will see a message that your laboratory is awaiting approval (Figure 6). You will receive an email once your laboratory has been confirmed by us. If the same laboratory has already been created, we will suggest you join that laboratory instead of making a new one. We do this to prevent that double accounts are being created.

<p style="font-size: small; margin: 0;">STATUS</p> <hr style="border: 1px solid #007bff;"/> <p style="margin: 5px 0 0 0;">Your laboratory is awaiting approval...</p>	<p style="font-size: small; margin: 0;">STATUS <span style="float: right;">Ready for scheme registration</span></p> <hr style="border: 1px solid #007bff;"/> <p style="margin: 5px 0 0 0;">You can now register for any of the schemes to the right</p>
---	---

Figure 6: Your laboratory will have to be confirmed by the EQA coordination center. This will be indicated on your dashboard: "Your laboratory is awaiting approval" (right). Once your laboratory is confirmed, you can register for an EQA scheme (left).

### 2.3 Participation with more than one laboratory

It is possible that you work in two laboratories at once, *e.g.* you participate in one EQA scheme with lab x and another EQA scheme with lab y. This is the case if you have the laboratory you already created (steps 2.1 and 2.2), and a colleague invites you as a collaborator for another laboratory.

Each person can create only one laboratory. They have to be invited to any other laboratory they work with. These two laboratories will never be identical, as the EQA coordination center will reject a laboratory proposal that already exists to avoid the creation of double accounts. A suggestion to join another laboratory will be sent in that case.

To see how you can invite someone to your laboratory, see 2.4.1.

To see how you can accept an invite from another laboratory, see 2.4.2.

Once you are accepted to two laboratories, you can navigate between the dashboards of both laboratories. You can switch by selecting which laboratory you want to view in the green box on top of the page (Figure 7).



Figure 7: You can switch between the dashboards for two laboratories you are part of via the green box at the top of the screen.

**Please always carefully check which laboratory dashboard you are using. Actions (such as subscriptions to EQA schemes) will be carried out only for this laboratory!**

## 2.4 How to invite colleagues to your laboratory and accept invites

### 2.4.1 Inviting colleagues or collaborators to your laboratory or EQA scheme participation

There are 2 ways of inviting people:

- A. Inviting a collaborator who is not part of your laboratory to participate in a specific EQA scheme

If someone can collaborate with you on a specific EQA scheme, but not get access to the entire laboratory account, you can invite them for a specific EQA scheme when signing up for this scheme (see 3.1, step 2).

- B. Adding a colleague to join your laboratory account

To invite a colleague, you need to navigate to the profile of your laboratory:

- Click on the profile icon in the top right corner 
- Click on **"Profile"**.
- **Click on the name of your laboratory** to navigate to its profile page.
- Select the tab **"Contacts"** and click on **"Invite colleague"** at the bottom of the page (Figure 8).
- **Enter the email addresses** of colleagues you want to invite and click **"Submit"**.

Everyone who was invited will receive an email invitation and will follow the rapid registration procedure, e.g. without having to enter all laboratory details again.

You can keep an overview of the people you invited to collaborate in your laboratory in the "Invitations" tab next to the Contacts tab at your laboratory's profile.

Laboratory details	Addresses	Contacts	Invitations
NAME		PHONE	
Mrs			
(anonymous)			
Miss			
<input type="button" value="Invite colleague"/>			

Figure 8: Navigate to the third tab "Contacts" in your laboratory's profile and click on "Invite Colleague" to add people to your laboratory account.

### 2.4.2 Accepting an invite to join a laboratory

Your colleagues can invite you to join the laboratory. In case you are invited, you will have to confirm regardless of whether you already have an account or not. You will receive an email with a link. If you want to join this laboratory, **click the link** in the email and **provide your information**. If you already have an account, provide your email address and password for the already existing account and click **“Submit”** (Figure 9).

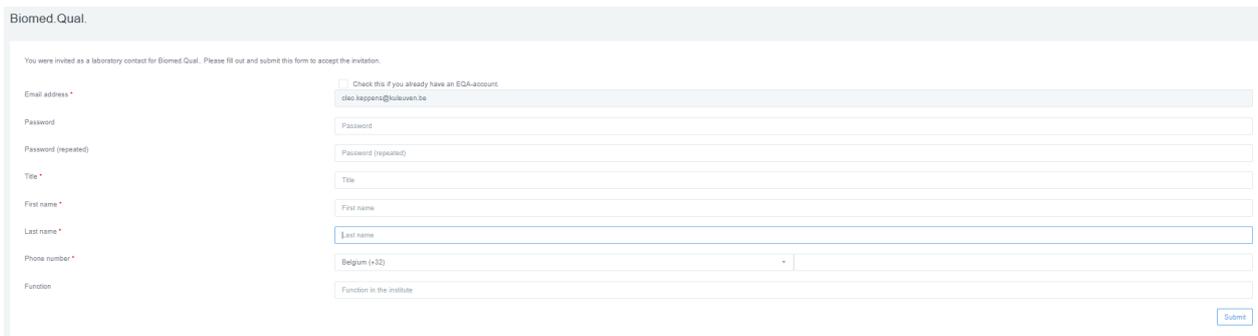


Figure 9: Fill in your personal information to join the laboratory that invited you and click "Submit".

## 2.5 Accessing your participants' dashboard and updating your information

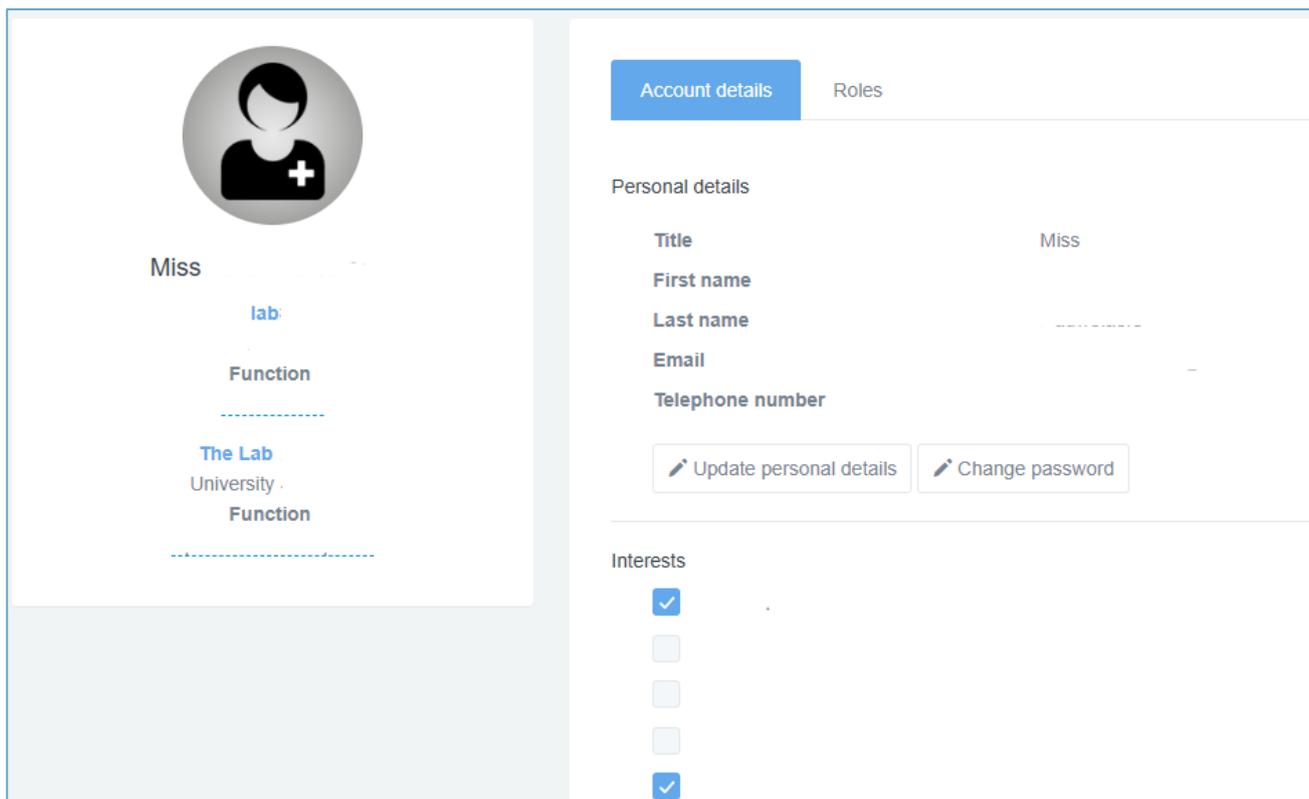
When you have an account, you can access and update your information or laboratory's information at any time. For more detailed information, go to "4. How to change your contact information or personal details".

- Go to [www.eqascheme.org](http://www.eqascheme.org) and click **“Dashboard”** in the upper right corner (Figure 1).
- **Sign in** with your username and password.
- If you forgot your password, you can reset it here.
- Go to your personal account by clicking on the profile icon and then **“Profile”**.
- You can update your personal details, change password or update interests here (Figure 10).
- To update your laboratory information, click on the name of your laboratory and update laboratory details.

If you are affiliated to multiple laboratories, you will see all of them in your personal profile. When you click on the laboratory you want to view on your personal profile, it will take you to the laboratory's profile. Laboratories that are approved will have a green flag stating that they are.

**Please note that your personal information is not the same as your laboratory's information. If you change the telephone number or email address for a laboratory, this will NOT change your personal telephone number or email address that you use to log in.**

If you want to update your function in a lab, you can just click on it on your personal profile and change it (Figure 10). Functions can be, for example, pathologist, molecular biologist, laboratory technician, laboratory director, etc. Filling out your function will aid in selecting the most appropriate content for you.



Account details Roles

Personal details

Title Miss

First name

Last name

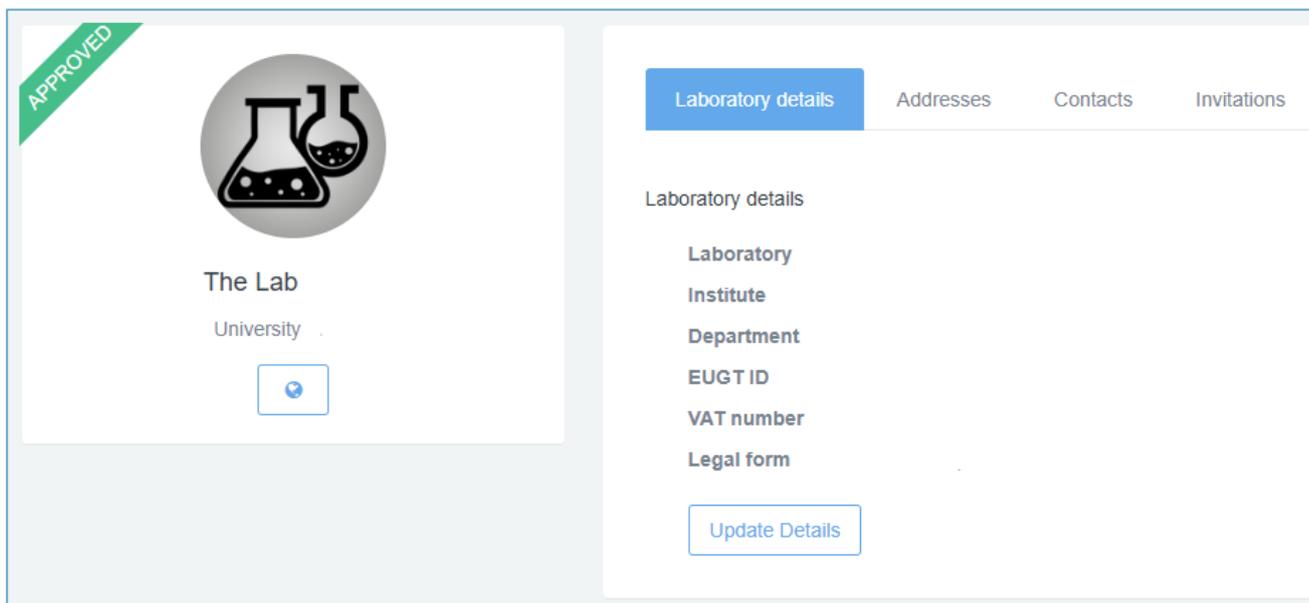
Email

Telephone number

Update personal details Change password

Interests

- 
- 
- 
- 
- 



APPROVED

The Lab  
University

Laboratory details Addresses Contacts Invitations

Laboratory details

Laboratory

Institute

Department

EUGT ID

VAT number

Legal form

Update Details

Figure 10: Update your personal details, interests or change your password on your personal profile (left). Your laboratory details can be updated on the laboratory profile (right).

### 3. How to register for an EQA scheme

Once you have a personal account which is linked to a laboratory, you can register for EQA schemes. On the right-hand side of the screen, all current EQA schemes will be visible. If they are open of registration, you will see a little red flag marked “Open” and a “Register now” button (Figure 11). To register for an EQA scheme, follow the steps below.

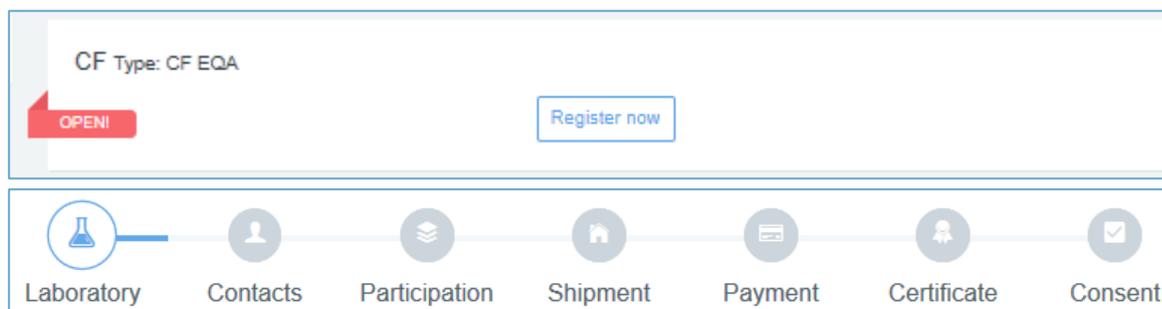


Figure 11: EQA schemes that are open for registration will be indicated as such on the right-hand side of your dashboard (top). After clicking on the “Register now” button, you will be directed to the 7-step process for registration to an EQA scheme (bottom).

#### 3.1 Laboratory

Select the laboratory you want to participate with. If you are part of multiple laboratories, you can select here which one you want to register to this specific EQA scheme. Click on “Select this laboratory” (Figure 12).

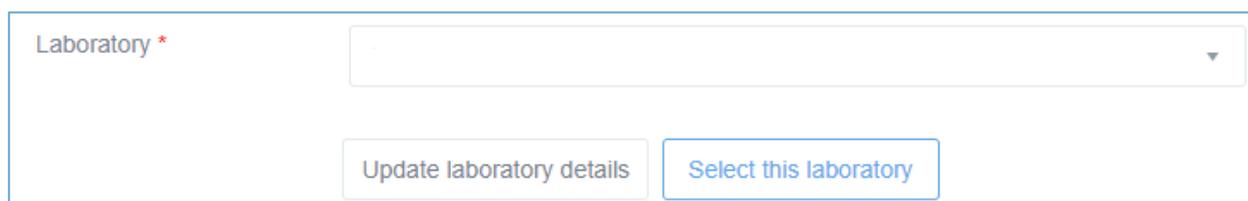


Figure 12: Select the laboratory you want to register for this specific EQA scheme.

**Please note that registration is only confirmed for that laboratory you have selected! In case you want to participate with two laboratories, you will have to create a registration for both of them separately!**

#### 3.2 Contacts

In the next step, you can select the **main laboratory contact** for this scheme. If you have **colleagues** working on the same scheme with you, you can give them access here under “Can also access this scheme”. If there are colleagues that are not affiliated with your laboratory yet, you can invite them by clicking “Invite extra colleagues to register” (Figure 13). They will follow a rapid registration procedure where they do not have to create a laboratory.

Please note, these colleagues are referred to as “anonymous” until they have accepted and had the opportunity to completing their profile information.

Click “Continue”.

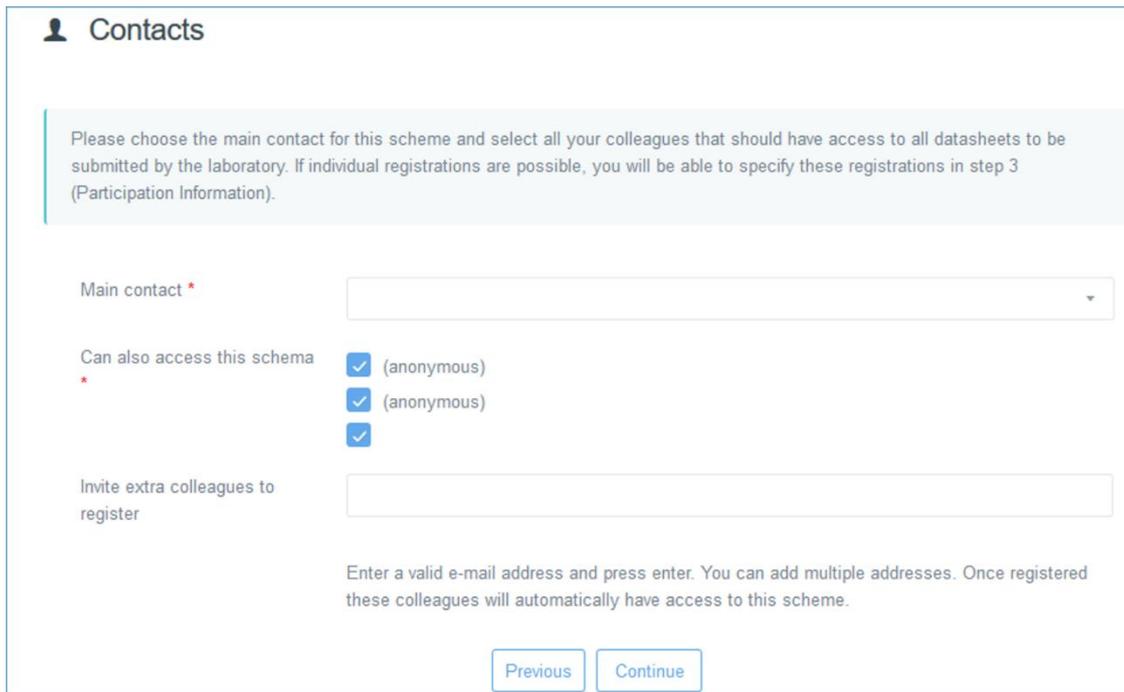
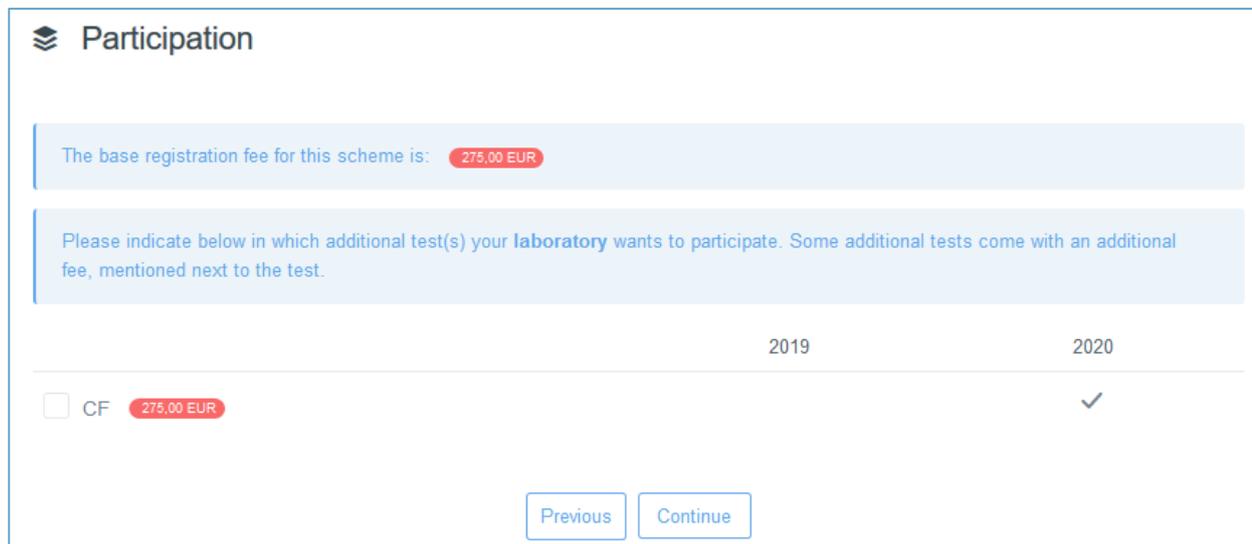


Figure 13: In the second step of the registration process, all contacts related to this specific process can be added.

### 3.3 Participation

In the following step, you can **select the sub-schemes** you want to participate in. For the CF 2020 scheme, there is only one scheme (€275) for which samples will be distributed in January 2020. Click on the checkbox to indicate you want to participate in these (sub-)schemes. Click **“Continue”** to move to the next step.



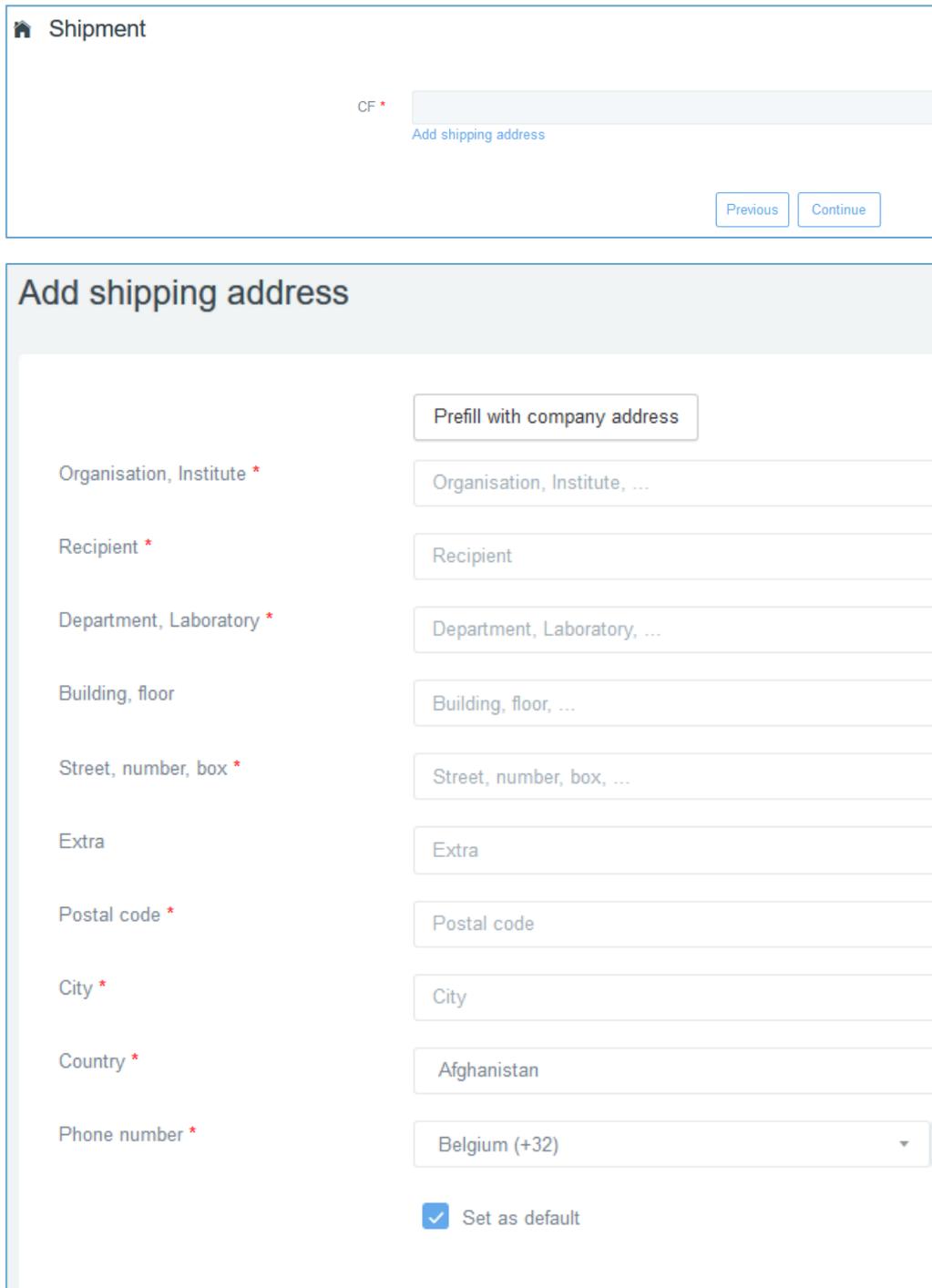
	2019	2020
<input type="checkbox"/> CF 275.00 EUR		✓

Figure 14: Sub-schemes can be chosen in the third step of the registration process.

### 3.4 Shipment of samples

In the fourth step, you can **add the shipping address** for this scheme. This is the address used to ship the samples to. Click the **“Prefill with company address”** if your shipping address is identical to the main company address (Figure 15).

Please make sure to provide the correct shipping address (e.g. sample reception could differ from main company office address). Then, click **“Continue”**.



Shipment

CF \*

Add shipping address

Previous Continue

### Add shipping address

Prefill with company address

Organisation, Institute \*

Recipient \*

Department, Laboratory \*

Building, floor

Street, number, box \*

Extra

Postal code \*

City \*

Country \*

Phone number \*

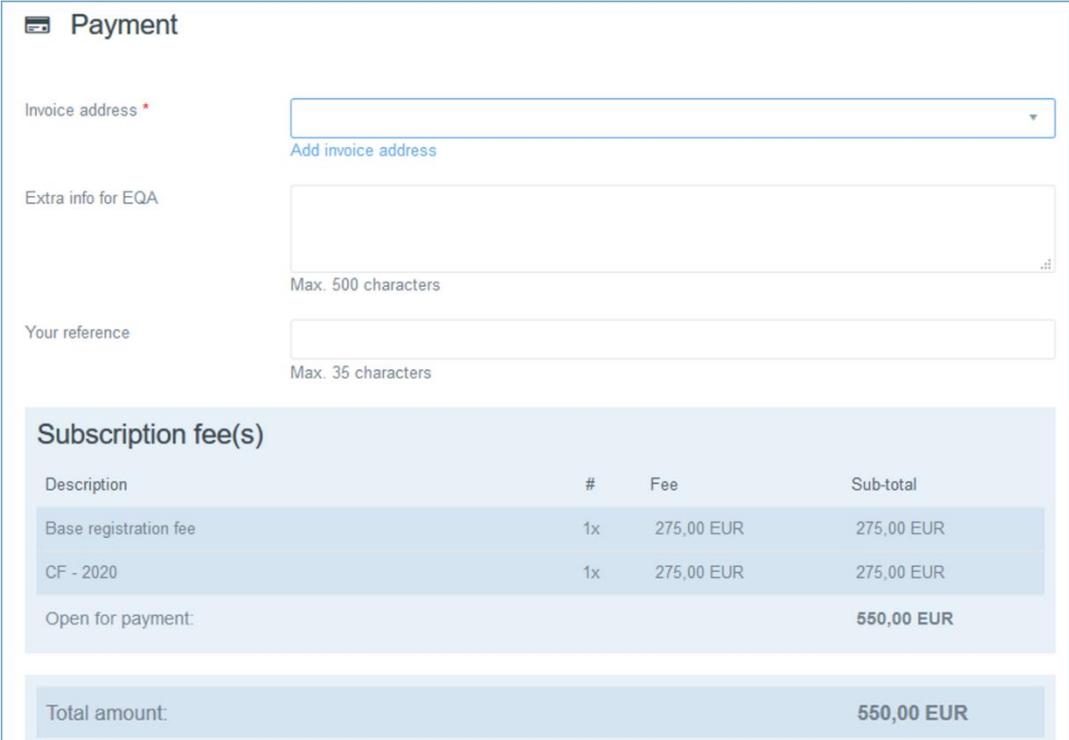
Set as default

Figure 15: The shipping address for samples needs to be given before you can move on. When clicking on “Add shipping address”, you can prefill with your company address information or adjust the address.

### 3.5 Payment

In the fifth step, **the invoice address** needs to be completed. The payment note for the registration fee will be sent to this address. The detailed cost for the different sub-schemes you chose in the third step is represented at the bottom (Figure 16).

You have the possibility to provide additional information for the EQA providers (not shown on invoice) and a personal reference (e.g. Purchase order (PO) number), which will appear on the invoice.



**Payment**

Invoice address \*  [Add invoice address](#)

Extra info for EQA  Max. 500 characters

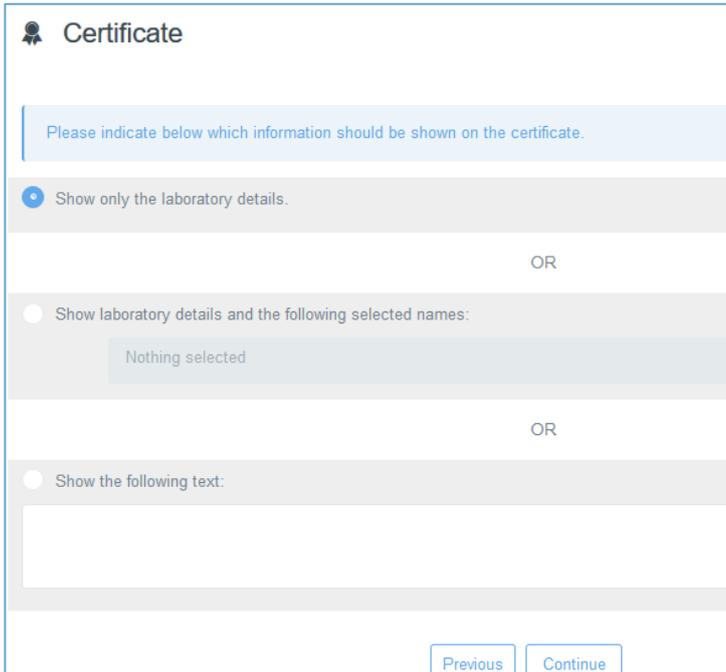
Your reference  Max. 35 characters

Description	#	Fee	Sub-total
Base registration fee	1x	275,00 EUR	275,00 EUR
CF - 2020	1x	275,00 EUR	275,00 EUR
Open for payment:			<b>550,00 EUR</b>
<b>Total amount:</b>			<b>550,00 EUR</b>

Figure 16: In the fifth step, the invoice address has to be given and a detailed breakdown of the payment is shown.

### 3.6 Certificate

At this step, you can indicate which information you want to be printed on the **final certificate**. There are three options: only laboratory details, laboratory details + a name of your choice or specific text. Click **“Continue”** to go to the last step of the registration process.



**Certificate**

Please indicate below which information should be shown on the certificate.

Show only the laboratory details.

OR

Show laboratory details and the following selected names:

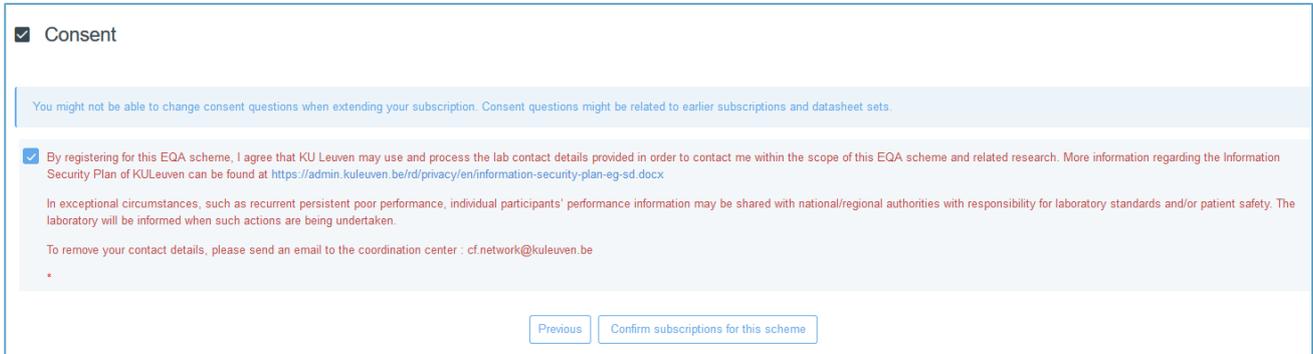
OR

Show the following text:

Figure 17: The information that will be printed on the certificate can be chosen in the sixth step.

### 3.7 Consent

For each EQA scheme, we will ask for your consent to use the information you provided (lab and EQA IDs, address details to ship samples, send invoices, etc.) and will provide (sample results, methods used, etc.). You will agree with all registration details when you click “**Confirm subscription for this scheme**” (Figure 18).



The screenshot shows a consent form with a checked box for 'Consent'. Below the box is a light blue informational bar stating: 'You might not be able to change consent questions when extending your subscription. Consent questions might be related to earlier subscriptions and datasheet sets.' A blue checkmark icon is followed by the text: 'By registering for this EQA scheme, I agree that KU Leuven may use and process the lab contact details provided in order to contact me within the scope of this EQA scheme and related research. More information regarding the Information Security Plan of KULeuven can be found at <https://admin.kuleuven.be/rd/privacy/en/information-security-plan-eg-sd.docx>'. Below this, a smaller font text reads: 'In exceptional circumstances, such as recurrent persistent poor performance, individual participants' performance information may be shared with national/regional authorities with responsibility for laboratory standards and/or patient safety. The laboratory will be informed when such actions are being undertaken.' At the bottom, it says: 'To remove your contact details, please send an email to the coordination center : [cf.network@kuleuven.be](mailto:cf.network@kuleuven.be)'. At the bottom right, there are two buttons: 'Previous' and 'Confirm subscriptions for this scheme'.

Figure 18: Consent to the use of your information and confirm your registration in the last step.

### 3.8 Confirmation email

When the registration is successful, everyone who is taking part in this EQA scheme (as indicated in step two) will receive a confirmation email. You will also see a confirmation message on your dashboard.

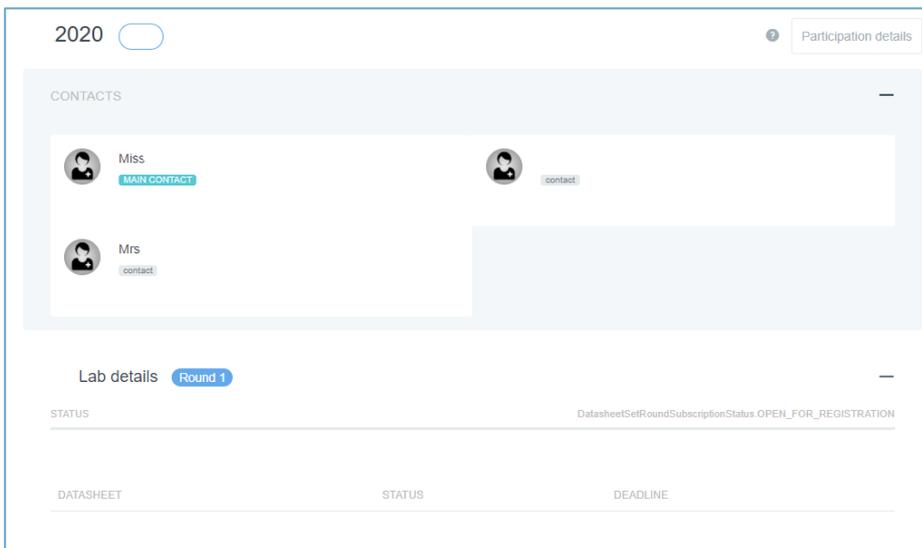
The registration process for the chosen EQA scheme is now complete and will be visible on your dashboard.

### 3.9 Viewing and editing your registration

Until the registration period is over you will be able to make changes to your registration. You can view the registration details by clicking “**Participation details**” and change those by clicking the button “**Manage participation**” on your dashboard for that scheme in the top right corner (Figure 19).

**Please make sure to go through all steps (3.1-3.7) of the registration to confirm your changes in the final step. You will not receive a new e-mail confirmation.**

When the registration is closed, the “Open” flag will be gone on the right-hand side. Registering for this scheme or changing your registration is no longer possible. For questions, please contact the EQA coordination center: [cf.network@kuleuven.be](mailto:cf.network@kuleuven.be).



The screenshot shows a user interface for registration details. At the top left, the year '2020' is displayed with a dropdown arrow. On the top right, there is a 'Participation details' button with a gear icon. Below this is a 'CONTACTS' section with a minus sign on the right. It contains two entries: 'Miss' with a 'MAIN CONTACT' tag and 'Mrs' with a 'contact' tag. Below the contacts is a 'Lab details' section with a 'Round 1' tag and a minus sign on the right. Under 'Lab details', the 'STATUS' is 'DatashetSelfRoundSubscriptionStatus.OPEN\_FOR\_REGISTRATION'. At the bottom, there is a table with columns for 'DATASHEET', 'STATUS', and 'DEADLINE'.

Figure 19: Change your registration details by clicking the “Manage participation” button on the top-right corner.