PROFICIENCY SAMPLE TESTING INSTRUCTIONS AND WORKSHEETS

Instructions and worksheets are included in your kit, unless you have opted not to receive paper forms (See "My Account - Paperless Proficiency Testing Options").

<u>**Instructions**</u>: These documents provide sample testing instructions for each of the samples you ordered in an Event, along with a list of analytes for each sample.

<u>**Worksheets**</u>: These forms are for laboratories that would like to record results on paper before entering their data into API's website. (If your laboratory is unable to, or chooses not to submit results online, these worksheets may be mailed to API.)

All worksheet and instructions are available online. They may be viewed (and printed) up to 2 weeks before your scheduled PT shipment, allowing you to prepare for an upcoming event at your convenience.

To access Instructions or Worksheets online:

1. Login to Paperless Proficiency Testing™ and select "Enter Results".
2. Select "Current Events".
3. Locate the appropriate test event under the "Select to Enter or Review Test Results" heading, and click on "Instructions".
4. Select your desired paperwork from the pop-up menu provided.

INSTRUCTIONS FOR REPORTING PROFICIENCY RESULTS

1. In Paperless Proficiency Testing, select "Enter Results".

2. Select "Current Events".

3. Available test events are listed under "Select to Enter or Review Test Results". When you click on the desired test event, you will be taken to a screen that lists all of the samples that you have ordered for that event.

    - If your lab is uploading results using DataDirect, a link will be available to upload the data file containing your proficiency testing results. If you need assistance with your DataDirect upload, please call us at 800-333-0958 and ask for DataDirect support.

4. When you click on an item listed under "Tests", you will be taken to the result entry page. If you have reported proficiency results to API in the past, a list of the analytes for which you reported results will appear first. Additional analytes that are included in that sample will appear below these, in a box labeled "Additional Analytes". (If you have never reported results to API, all of the analytes that may be tested in that sample will be listed.)

5. Proceed to enter and save your results as directed by the instructions on each screen.

    Note: For more details regarding result entry, click on "Help with Recording Results" at the top of the result entry page. These instructions are intended to make the process as simple as possible; however, please call our customer service department at 800-333-0958 if you have any questions!

6. If you have submitted results online, do NOT mail or fax worksheets to API. If you choose to mail or fax results, all results must be written on the worksheet. API is not able to interpret results from instrument printouts.

7. When testing is finished, keep your documentation (e.g., photocopied worksheets, instrument printouts, online printouts) for your own records.

SIGNATURES REQUIRED – For all PT results, an attestation statement must be signed by <u>testing personnel</u> and the <u>laboratory director</u> and <u>retained for a minimum of 2 years</u>. An attestation statement can be found either online or in your worksheet packet.

VERIFICATION SAMPLES

- CLIA regulations specify that laboratories are not to test PT samples on more than one instrument/method unless that is how patient samples are routinely handled. Verification samples are intended to verify the performance of additional instruments/methods <u>after the PT reporting deadline has passed</u>.

- The designated testing period for Verification samples is after the testing period for proficiency samples. **If you have ordered a Verification program, the dates of this testing period appear on the front cover of this packet, as well as online**.

- Store the Verification samples in the refrigerator <u>unless otherwise noted on the sample packaging</u>. **Do not test the Verification samples until the designated testing period**.

- Testing instructions, result reporting, and evaluation reports for Verification programs are available online only.

Testing Instructions

- Sample handling and testing instructions are located in Paperless Proficiency Testing, under "Enter Results".

- Instructions may be viewed two weeks prior to the shipment date; however, you will not be permitted to enter results for Verification samples until the designated testing period has begun.

Reporting Results

- When the designated testing period has arrived and you are ready to test the samples, remove samples from storage. Process and test the samples according to the instructions available online.

- Worksheets are also available for Verification samples (under "Instructions"). However, **Verification worksheets may not be returned to API. Verification results may be entered online only.**

- Enter your results for Verification samples online by the posted due date, following instructions provided in Paperless Proficiency Testing.

Evaluation Reports

- The results you report for Verification programs will be compared to the means of the most appropriate peer group, according to the method information you provide.

- Your results will be graded (Acceptable/Unacceptable); however, your performance will not be sent to any agency or accrediting body, including CMS.

- Evaluation reports for Verification Programs consist of the Comparative Evaluation only; a Performance Summary will not be generated for these programs. Trending graphs for quantitative analytes will also be available (see Performance Analysis online). These reports will be available online at the same time as your proficiency evaluation reports.