



INAB Assessor Portal User Guide

CRM1

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1. Login

Supported software versions

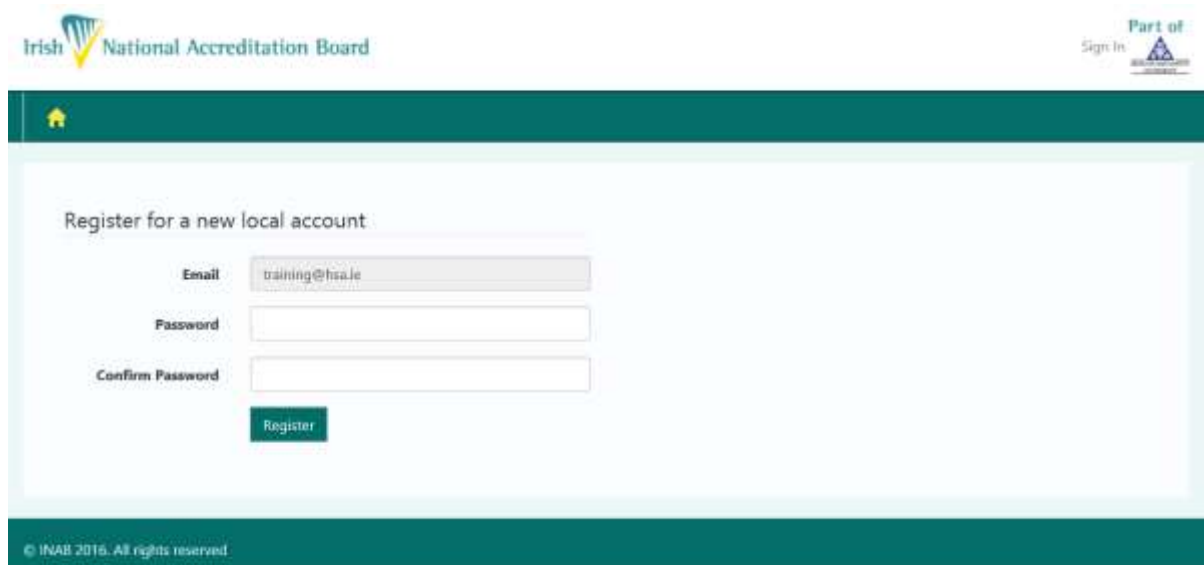
Web Browser: Google Chrome, Mozilla Firefox, Internet Explorer IE8+

Microsoft Excel: MS Excel 2010, 2013

1.1.Set up Portal password

An email will be sent with a URL to set up a password for the Portal.

Click on the link in the email which will open a page which has the email pre populated:



You must enter in your new password for the Portal twice, they must match and meet the following criteria:

- Passwords must be at least 8 characters
- Passwords must contain at least one symbol e.g. '!', '£', '#', '%', '&', '\$', '@')
- Passwords must have at least one uppercase ('A'-'Z')

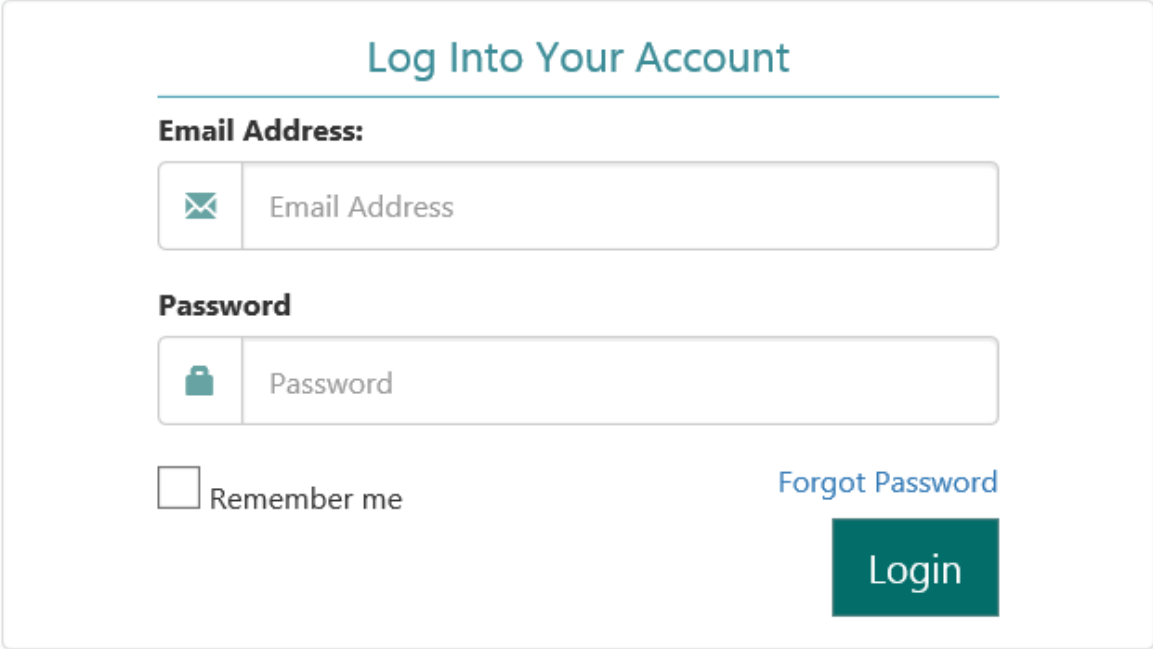
Click on Register, if you have not entered in a password the system accepts you will be given a warning.

INAB will never know your password.

When you register you will not be able to do anything on the site until the Assessor profile is set up. See section 3.

1.2. Login

When you click on the Portal Login link you will see this page:

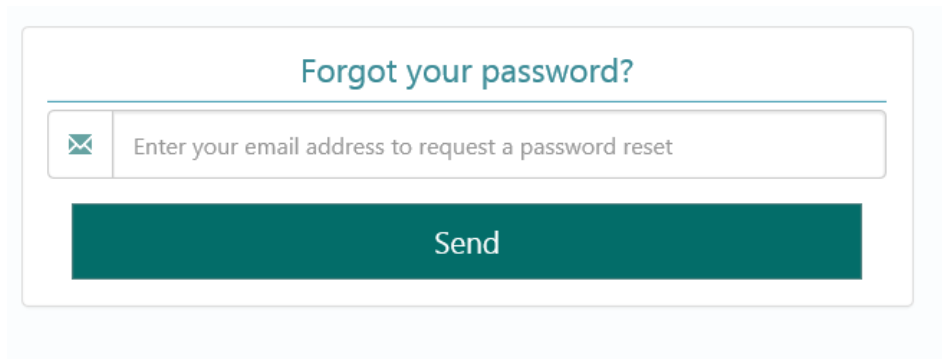


The screenshot shows a login form titled "Log Into Your Account". It features two input fields: "Email Address" with an envelope icon and "Password" with a lock icon. Below the password field is a "Remember me" checkbox. To the right of the "Remember me" checkbox is a "Forgot Password" link. A dark teal "Login" button is positioned at the bottom right of the form.

Use the email address and password you registered with. This will open up the homepage which is covered in section 2.

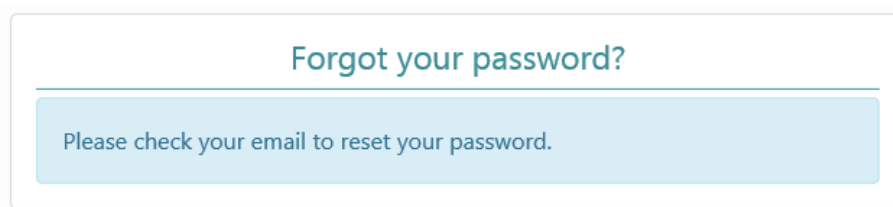
1.3. Forgot my password

If you forget your password click on the Forgot Password on the login page:



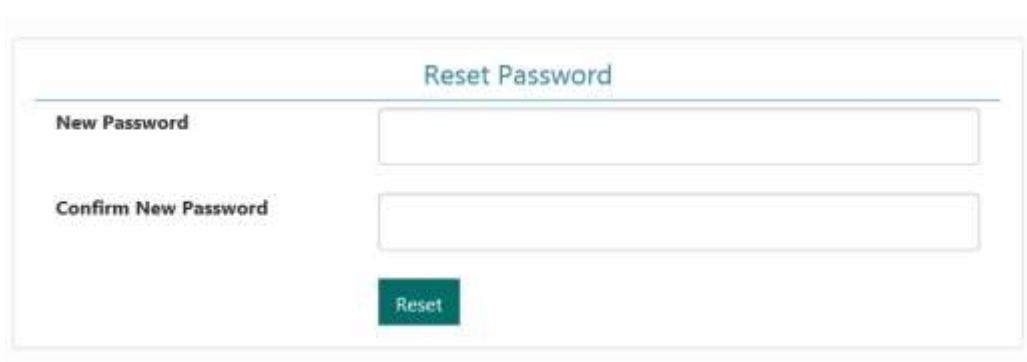
The screenshot shows a form titled "Forgot your password?". It features a text input field with a placeholder "Enter your email address to request a password reset" and a dark teal "Send" button below it.

When you enter your email and press send you are informed:



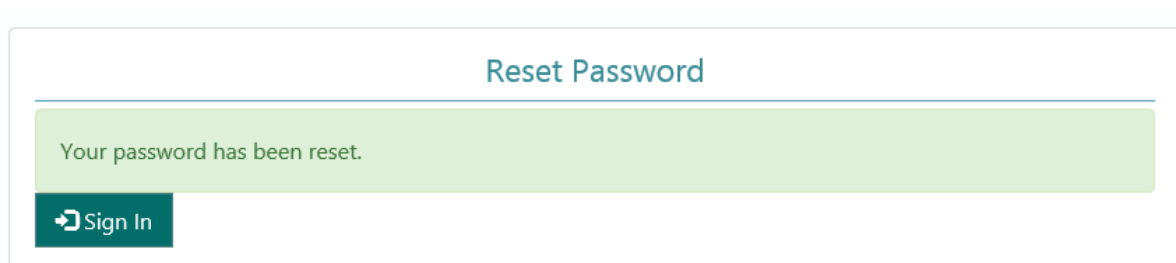
The screenshot shows a confirmation message box titled "Forgot your password?". The message reads: "Please check your email to reset your password."

You will receive an email with a link to reset your password which when clicked will show you:



The screenshot shows a form titled "Reset Password". It has two text input fields: "New Password" and "Confirm New Password". Below the fields is a dark teal "Reset" button.

When a correct password is entered the message will show:



The screenshot shows a confirmation message box titled "Reset Password". The message reads: "Your password has been reset." Below the message is a dark teal "Sign In" button with a right-pointing arrow icon.

1.4. Account locked

If you enter your password incorrectly three times you will see the following message and you will be locked out of the portal for five minutes:

Log Into Your Account

- The user account is currently locked. Please try again later.

Email Address:

	training@hsa.ie
---	-----------------

Password

	Password
---	----------

Remember me

[Forgot Password](#)

Login

1.5. Logout

In the header navigation when you are logged in the Logout is accessible via a link:



If there is no activity on the Portal for 15 minutes, a warning message will appear and stay on the screen for 15 minutes before the expiry time of the page.

If you click 'Continue' within these 15 minutes the page will reactivate. If not, after another 15 minutes you will be informed that the page has expired and will be redirected to enter your login details again.

1.6. Supported software

Supported software versions

Web Browser: Google Chrome, Mozilla Firefox, Internet Explorer IE8+

Microsoft Excel: MS Excel 2010, 2013

The INAB CRM and Portal systems are only developed and tested for Windows systems.

Third party support will not proceed with an investigation to confirm whether it works within the Windows system, and if the issue is isolated to MAC.

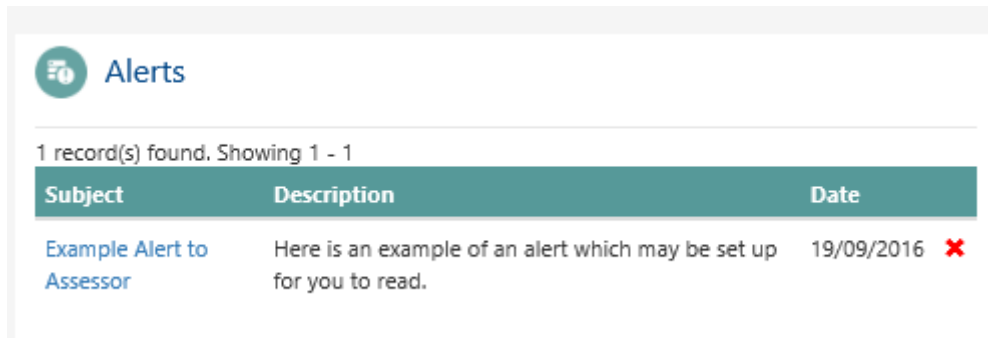
IT support advises that users try the same steps on a Windows machine before logging a call

2.Home Page

2.1. Alerts

Alerts will inform you of items which your INAB assessment manager may want you to be aware of.

In the panel you will see a list.



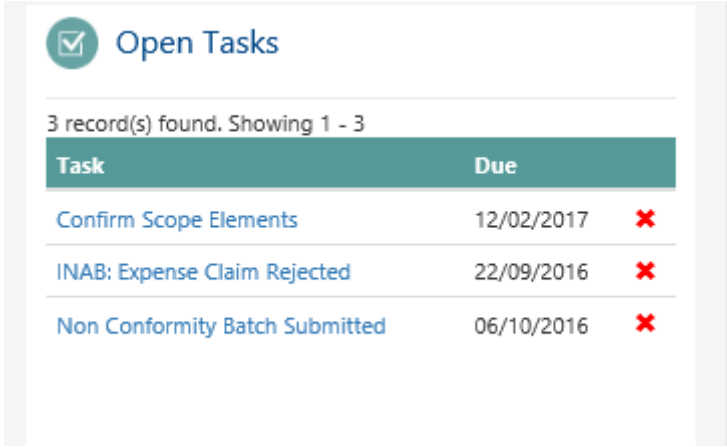
Subject	Description	Date
Example Alert to Assessor	Here is an example of an alert which may be set up for you to read.	19/09/2016 ✘

You can click into the subject to dismiss the alert or click on the red X. It is recommended to dismiss alerts as you read them.

2.2. Tasks

The task view will list items which require action from you.

Here is an example of tasks which may be listed:



The screenshot shows a user interface for 'Open Tasks'. At the top left, there is a blue circular icon with a white checkmark. To its right, the text 'Open Tasks' is displayed in a blue font. Below this, a message states '3 record(s) found. Showing 1 - 3'. A table follows with two columns: 'Task' and 'Due'. The table contains three rows of data, each with a red 'X' icon to its right.

Task	Due	
Confirm Scope Elements	12/02/2017	✘
INAB: Expense Claim Rejected	22/09/2016	✘
Non Conformity Batch Submitted	06/10/2016	✘

In the first entry 'Confirm Scope Elements' you have been included on an event so you should confirm the scope elements you plan to assess during the visit.

In the next 'Expenses Claim Rejected.' Open this task to see the reason it is rejected so you can fix the issue and resubmit the claim.

Or an NC batch has been assigned back to you from the CAB or INAB. Please open and review corrective actions submitted.

Opening the task will give more information on the task that is due.

When the task has been completed the task can be opened and marked as complete or the red X clicked.

2.3. Events in progress



The events panel shows all events which are in progress and which CABs are being assessed.

If the assessment has been completed and NCs are uploaded to an event, then the NCs will be shown in traffic lights, both as ones you have uploaded versus ones the team have.

Red is for Major NCs, amber for Minor and green for Cleared.

Events In Progress

3 record(s) found. Showing 1 - 3

Event Date	Type	CAB	Status	My NC's	All NC's
14/03/2017	First Surveillance	Training CAB MMD	Plan Confirmed		
16/09/2016	First Surveillance	Training CAB MMD	Plan Confirmed		
15/09/2016	Initial Assessment	Training CAB MMD	Addressing NCs		

By clicking on the column headers the sort order will change for the list. By clicking on an individual event type the event will open.

2.4. Unconfirmed events

A list of all the unconfirmed events will be shown in the next panel:

Unconfirmed Events		
Date -	Type	CAB
19/09/2016	Preliminary Review of Application	Acme Hospital

It is very important to confirm your availability for events so that:


- You can upload documents to the event
- You can download the NC template to able NCs to be loaded
- You are able to make claims for the visit.

Click on the type to open the event to confirm it, this is covered in section 4.1.

3. Create Assessor Profile

3.1. Assessor profile

Until your profile is completed you will see this message:

 Your profile is not complete. [Click here to complete your profile](#)

Your application will not be reviewed by INAB until your profile has been completed. After the profile is reviewed you will be approved as a Technical Expert or Technical Assessor and a contract will be drawn up.

When this is counter-signed and returned to INAB you will then be approved to attend assessments on behalf of INAB.

To begin the process, click on complete profile to go to the profile wizard.

Note:



You have the option to 'Save and proceed to next step' on each page when filling out your details. But you can also 'Save and go back' if you have forgotten some details on previous pages. This will allow you to move back and forward during your application process and avoid having to re-enter details while doing so.

3.2. General assessor information

Enter your name, address, and contact details.

All items with an * must be completed before proceeding to the next step.

Create Profile

Step 1 of 8 - General

Title*	<input type="text" value="Select your title"/>
First name*	<input type="text" value="PK"/>
Last name*	<input type="text" value="TestOct20"/>
Address*	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Country*	<input type="text" value="Select your country"/>
County	<input type="text"/>
Postcode/Eircode	<input type="text"/>
Telephone*	<input type="text"/>
Mobile*	<input type="text"/>

3.3. Current employment status and experience

Please enter your current employment status, your normal place of work, any experience of previous work with other Accreditation Bodies (ABs).

If you have worked with and INAB accredited CAB provide details.

Finally give a brief summary of relevant work experience to date.

Create Profile

Step 2 of 8 - Add Current Status and Work Experience

Position held in current employment*	<input type="text"/>
Number of years in this position*	<input type="text"/>
Are you actively working with another accreditation body (AB)?*	<input type="text" value="No"/>
If you answered yes to the above, please document the AB, the number of assessments in the last 12 months and your role in those assessments.	<input type="text"/>
Have you worked with any INAB accredited CAB? If yes, provide detail including CAB name, role and duration of work*	<input type="text"/>
Summarise relevant work experience to support the assessment role. Include the number of years you worked in relevant areas.*	<input type="text"/>

← Save and go back Save and proceed to next step →

As per ISO 17011, INAB is obliged to inform its conformity assessment bodies of the names of assessment team members, and also the organisations that the team members belong to. The information in the 'Company Name' field, this information does not always reflect the 'organisation that you belong to' – you might have a company name set up for your assessor activities, but you might also have full-time/part time employment with, for example, a university, a hospital, a laboratory, etc.

The details that you enter in the 'Company Name' field are not shared with the CAB, but if you are on an assessment team, whatever is entered in the new 'Normal place of employment' field will be visible to the CAB whenever it logs into its portal for that particular assessment.

Telephone*

Mobile*

Normal place of employment*

Please note:

- If you have retired – enter Retired.
- If assessment or consultancy is your main employment – enter the name of your company.
- If you have a contract of employment with multiple organisations (eg hospitals) – enter the name of each organisation

(Note: this information will be shared with any CABs for which you are assessor and with the other INAB assessors assigned to the event, as required by ISO 17011:2017)

3.4. Contract and financial matters

You will be contracted to the Health and Safety Authority to provide professional services to INAB.

INAB contracts external technical assessors on a day rate basis. Once you are activated on our system INAB will pay an agreed rate for each assessment undertaken.

Assessors may be either self-employed or working through a limited company. The level of work is demand-led, and as a result INAB cannot guarantee specific a specific number of assessments annually.

If you wish to be paid through a company, enter the company name when prompted.

When contract with on an individual or company basis, a valid tax clearance certificate is required annually for the individual/company under contract.

Add your Daily Rate, preferred currency and VAT number, if registered to pay VAT in Ireland.

Step 3 of 8 - Contract & Financial Matters

Please note that the assessors are contracted to the Health and Safety Authority to provide professional services to INAB. The Terms and Conditions of Business are on the INAB website. A valid tax clearance certificate is required annually for the individual/company under contract.

Do you wish to be contracted to INAB:*	Select an option ▼
Company name	<input type="text"/>
Daily rate (8 hour basis)*	<input type="text"/>
Specify currency (please note INAB pays all invoices in Euro)*	Select an option ▼
Are you registered to pay VAT in Ireland?*	No ▼
VAT number	<input type="text"/>

◀ Save and go back

Save and proceed to next step ▶

3.5. Add qualifications and training

See CRM8 'INAB Portal User Guide for New Assessors' for more detailed instructions. On the next step you must add one qualification at a minimum.

Step 4 of 8 - Add Qualifications

Educational qualifications and training in an accreditation standard + Add qualification

Please note you will be required to upload certificate or evidence of qualification. Professional memberships can be entered on the next page.

No records found.

Qualification Type	Qualification Name	Institute Name	Year Awarded	Year Expired
--------------------	--------------------	----------------	--------------	--------------

< Save and go back Save and proceed to next step >

Click on Add qualification and complete all the mandatory fields. Evidence of qualification (e.g. certificate) should be uploaded at this point. If it is a large document this may take longer to process.

Add Qualification

Qualification Type*

Qualification Name*

Institute Name*

Year Awarded*

Year of expiry (if applicable)

Certificate*

Cancel Save Qualification

3.6. Membership of professional body

If you are a member of any professional organisations then click on 'Add Membership' and fill in the details.

This section is optional.

Step 5 of 8 - Member of Professional Body (Optional)

My Memberships

+ Add membership

No records found.

Membership Name	Year of Membership	Year Expired
-----------------	--------------------	--------------

Go backSave and proceed to next step

Add Membership

Membership Name*

Year Joined*

Year Expired

CancelSave Membership

3.7. Expert/Assessor expertise

Enter any experience or training you have had in being a Lead Assessor (e.g. for another Accreditation Body). Upload documentary evidence.

Enter any experience or training you have had in being a Technical Assessor/Technical Expert (e.g. for another Accreditation Body)

Finally add any other quality management training and experience (e.g. internal auditor training, company quality/technical manager).

Step 6 of 8 - Expert/Assessor Expertise

Lead assessor experience	<input type="text"/>
Lead assessor training (mandatory to add a document)	<input type="text"/>
Upload documentary evidence	<input type="button" value="Choose Files"/> No file chosen <input type="button" value="Upload"/>
Technical assessor experience (include number of assessments in the last 12 months)	<input type="text"/>
Other quality management experience (include number of years)	<input type="text"/>
Other quality management training	<input type="text"/>

Section	What information are we looking for? <i>Insert Not Applicable if appropriate</i>
Accreditation Standard(s) selection	<ul style="list-style-type: none"> • Select relevant standard you are applying to assess to • This should be supported by your training and experience. • Tick the box(s) that apply from the drop down menu. (*see screen shot above).
Lead Assessor Experience:	Outline your Lead Assessor experience and training <ul style="list-style-type: none"> • Type of assessments • accreditation standard • accreditation body • Outline number of assessments fulfilled as lead assessor (e.g. 12 assessments in 2019 as LA in ISO 17025)
Lead assessor Training:	<ul style="list-style-type: none"> • Outline the training you have received and the training provider • e.g. ISO 15189 lead assessor course/ other source(s).
Upload documentary evidence	<ul style="list-style-type: none"> • Upload your documents/certificates to support your lead assessor and technical assessor training and experience. • Click on “Choose files” to source the required electronic documents. • Choose upload to attach to your application.
Technical Assessor Experience	Outline your Technical Assessor/Technical Expert experience and training <ul style="list-style-type: none"> • Type of assessments • accreditation standard • accreditation body • Outline number of assessments fulfilled as technical assessor or technical expert (e.g. 12 assessments in 2019 as TA in ISO 17025 – Chemistry) Submit evidence in Upload Documentary Evidence
Other Quality Management experience (Include number of years)	This can include any experience of managing or working in an accredited organisation
Other Quality Management training (include number of years)	This can include any QMS training received which is relevant to your application

3.8. Technical expertise

Complete all areas in which you have technical competency, whether through training or experience.

If competency is maintained through assessment experience enter the number of assessments in the last 12 months and what the role was.

If it was by consultancy you must enter in what the consultancy experience was.

1. On the drop down menu select the Standard
2. Scroll across to select Sub-scope
3. Tick each in which you have technical competency, whether through experience or training.
4. Add a comment to justify your competence and upload a document as evidence of this competency (e.g. training certificate, CV).
5. Select your sub scopes level 1's and 2's by ticking the boxes beside each one

You can either select all or individually. Use the search to help find sub-scopes.

Click on the blue text to display the level 2 classifications which are included in each level 1

These subscope elements match those on CAB scopes of accreditation. For a full list please see the STxxCRM (1-24) documents on INAB website.

6. Click on Save Expertise when complete. The Save Expertise will not be available for selection until you have entered a comment into the Justification box.

Create Profile

Step 7 of 8 - My Technical Expertise

Select Standard: ISO 17025 T

Test | Acoustic & Vibration Testing | Biological and Veterinary Testing | Chemical Testing | Construction Materials Testing | Electrical Testing | Forensic

Sub-scope expertise supported by*

Training Experience

Justification (limited to 2000 characters; please use the 'choose files' feature below to upload CV, certificates, or other documentary evidence)*

Choose Files: No file chosen | Upload

Please select the expertise fields for which you have supporting evidence. Please consult the INAB website for the latest version of CRM Classification codes to help select the relevant Subscopes.

Search: | Save Expertise

Sub-Scope Level 1	Sub-Scope Level 2	Approval Status
<input type="checkbox"/> 001 Electromagnetic compatibility	<input type="checkbox"/> .01 Emission testing	Not Approved
	<input type="checkbox"/> .02 Immunity testing	Not Approved
	<input type="checkbox"/> .03 Magnetic field emissions	Not Approved

You will see a success message on screen after you have saved your Expertise.

Approval status will change from Not Approved to Submitted

Successfully saved. Expertise has been submitted to INAB for review.

Select Standard ISO 17025 T

Test Acoustic & Vibration Testing Biological and Veterinary Testing Chemical Testing Construction Materials Testing Electrical Testing Forensic

Sub-scope expertise supported by*

Training

Experience

Justification (limited to 2000 characters; please use the 'choose files' feature below to upload CV, certificates, or other documentary evidence)*

both training and experience obtained in standard. See attached documentation.

No file chosen

Please select the expertise fields for which you have supporting evidence. Please consult the INAB website for the latest version of CRM Classification codes to help select the relevant Subscopes.

Search:

Sub-Scope Level 1	Sub-Scope Level 2	Approval Status
<input checked="" type="checkbox"/> 301 Electromagnetic compatibility	<input checked="" type="checkbox"/> .01 Emission testing	Submitted
	<input checked="" type="checkbox"/> .02 Immunity testing	Submitted
	<input checked="" type="checkbox"/> .03 Magnetic field emissions	Submitted
	<input checked="" type="checkbox"/> .99 Other	Submitted
<input type="checkbox"/> 302 Approval & performance tests	<input checked="" type="checkbox"/> .01 Radio communications equipment	Submitted
	<input checked="" type="checkbox"/> .02 Electrical appliances and accessories	Submitted
	<input type="checkbox"/> .03 Telecommunications equipment	Not Approved
	<input checked="" type="checkbox"/> .99 Other	Submitted

Click on Save and proceed to next step to complete the final step of your application

<input checked="" type="checkbox"/> .99 Other tests	Submitted
---	-----------

Technical competence criteria must be defined in full against the following documents:

Testing and Calibration Laboratories: CRM code classifications (www.inab.ie) – incorporated in the dropdown menus of the application.

Inspection Bodies: CRM code classifications – incorporated in the dropdown menus of the application.

Certification Body Activities: IAF and NACE codes – incorporated in the dropdown menus of the application.

http://ec.europa.eu/comm/competition/mergers/cases/index/nace_all.html

and www.iaf.nu

For Product Certification of:

1. Food, please refer to Sector Schemes (e.g. BRC Food, BRC Packaging, GlobalGAP etc.)
2. Organic products, please ensure competence criteria in EA-3/12 are met.

For certification of persons please refer to specific schemes

3.9. Information confirmation and verification

This is the final step of your application – the Information Confirmation and Verification step.

Step 8 of 8 - Information Confirmation and Verification

Referee is required to be an immediate senior officer or professionally qualified referee where there is no senior officer.

Referee name*

Referee email*

Referee phone*

Referee position/role*

Relationship to applicant*

< Save and go back

Submit to INAB >

All fields are mandatory.

Please enter your Referee name, Referee email address, Referee phone number, Referee's position/role and the relationship this Referee has with you.

Click the 'Submit to INAB' button in the bottom right corner and your Assessor application will be sent to the INAB Quality team for review.

My Events My NC Batches My Claims My Profile Library

Create Profile

Profile complete

Congratulations. You have successfully created your profile.

Go home

A member of the INAB quality team will be in touch with you regarding your application.

If more information is requested you will be able to go through the wizard again to provide more information.

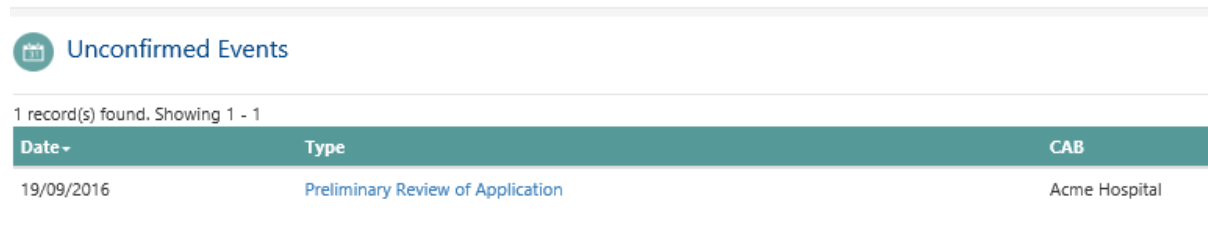
If approved you will be sent a contract to sign and return.

4. My Events

4.1. Confirm availability

When you are added to an Event you will receive an email with the terms of the event.

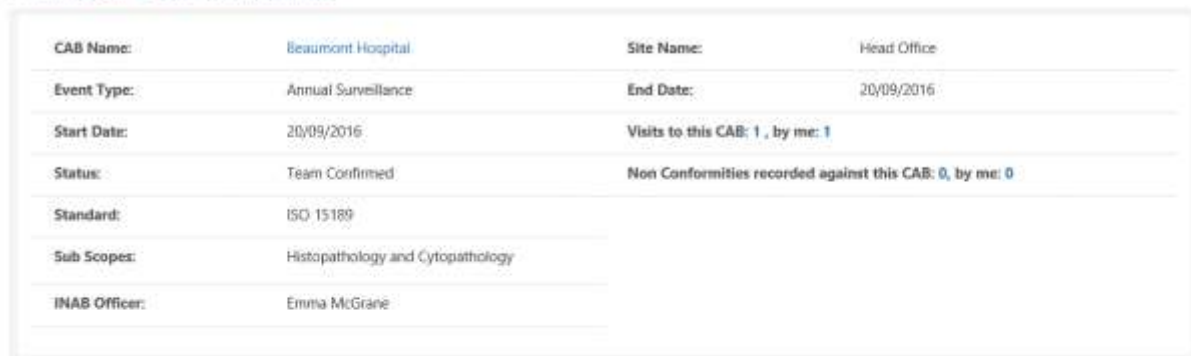
In the portal you can then confirm your availability. All unconfirmed events are listed on the homepage.



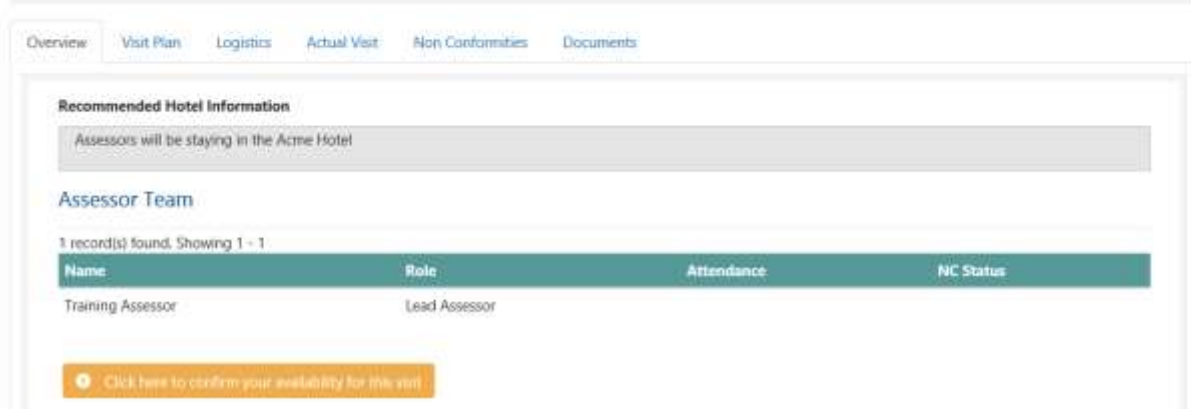
Date	Type	CAB
19/09/2016	Preliminary Review of Application	Acme Hospital

When you click on the unconfirmed event on your homepage it will open the event which will list CAB and event details:

Annual Surveillance



CAB Name:	Beaumont Hospital	Site Name:	Head Office
Event Type:	Annual Surveillance	End Date:	20/09/2016
Start Date:	20/09/2016	Visits to this CAB: 1, by me: 1	
Status:	Team Confirmed	Non Conformities recorded against this CAB: 0, by me: 0	
Standard:	ISO 15189		
Sub Scopes:	Histopathology and Cytopathology		
INAB Officer:	Emma McGrane		



Name	Role	Attendance	NC Status
Training Assessor	Lead Assessor		

[Click here to confirm your availability for this visit](#)

To confirm availability click on “Click here to confirm your availability for this visit”. Note the visit may not be an onsite visit. It may be a document review. The following screen will open:

Confirm your details for Annual Surveillance

Event Type:	Annual Surveillance
Cab Name:	Beaumont Hospital
Site Address:	Blood Transfusion Department, Beaumont, Dublin
Role:	Lead Assessor
Start Date:	20/09/2016
End Date:	20/09/2016
Days Onsite:	1
Day Rate	1050.00
Day Rate Currency	Swedish Krona

[← Return](#) [I am confirming my availability for this visit.](#)

Review the information for the event and if happy click “I am confirming my availability for this visit”.

Extensions to scope by correspondence

In certain limited cases it may be possible to complete an assessment by correspondence (see INAB P7). When confirming availability for such an event the assessor must include a justification for why the extension to scope assessment may be assessed by correspondence.

Assessors Calendar

Assessors can enter dates they are **NOT available for visits in the Assessor Portal** – this has been very helpful for the scheduling unit, and would encourage all to use.

This feature has limitations and allows only periods of unavailable dates to be recorded.

- Log into the Portal
- Choose My Events
- Below the events section is My Availability
- Choose the Add Unavailability
- All dates in the past will be greyed out for the assessor
- Assessors will only be able to add unavailability if they are approved, otherwise the button will be inactive.
- Insert the date range you are unavailable – e.g. 2019-12-01 to 2019-12-31 reflects that you are unavailable for month of December – this can be done for each period of time you are not available.
- If you are only available for December – you can put in a date range of 2019-01-01 to 2019-11-30.
- Save and this will be reflected in your calendar as below; and the information will be available to the scheduling team.

Add unavailability

Events for - PK TestOct20

Show Events: ▼

No records found.

Title	Type	Start Date-	End Date	CAB	Event Status
-------	------	-------------	----------	-----	--------------

My Availability Please enter dates you are not available for participating on INAB assessments. + Add Unavailability

< > today **October 2020** month week

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17

4.2. Review application or accreditation history

Open an event by clicking on the **CAB name**:

CAB Name:	Beaumont Hospital	Site Name:	Head Office
Event Type:	Witnessed Audits	End Date:	20/09/2016
Start Date:	20/09/2016	Visits to this CAB: 4 , by me: 4	
Status:	Addressing NCs	Non Conformities recorded against this CAB: 3 , by me: 3	
Standard:	ISO 15189	My NCs:	1 2 0
Sub Scopes:	Histopathology and Cytopathology	All NCs:	1 2 0
INAB Officer:	Emma McGrane		

This gives information on the accreditation:

225MT for ISO 15189

225MT for ISO 15189			
Awarded:	07/04/2009	Standard:	ISO 15189
Renewed:	11/11/2013	Sub Scope(s):	Histopathology and Cytopathology
Expires:	11/11/2018	Status:	Approved

History	
Application History:	Link To App History
Request History:	Link to Change Request History

Head Office			
Sub Scope	Scope Item	Category	Scope Element

If you need to review an application form then click on the link to **Application History**:

Application History



1 record(s) found. Showing 1 - 1

Date Submitted	Application Type	Current Status	View Application
08/06/2016	New Application	Submitted	Application for 15189

Close

All applications will be listed.

This will include new applications, scope extension assessment events and extensions by correspondence.

Select the relevant application. This will list out all the subscopes, the CAB key personnel, all scope elements on the application (click on the arrow to see more detail).

The CAB quality manual and any other documents uploaded as part of the application will be listed at the end.

Beaumont Hospital Application

Standards and Sub Scopes

Standard: 225MT for ISO 15189

Sub Scopes: Histopathology and Cytopathology

Key Personnel

Laboratory Director: Mr Lab Director

Clinical Manager: Dr Clinical Manager **Deputy Clinical Manager:** Deputy Name

Technical Manager: Mrs Technical Manager **Deputy Technical Manager:** Deputy Tech Manager

Quality Manager: Qual Manager **Deputy Quality Manager:** Deputy quality manager

Name and position of the Organisations representative with authority to commit to accreditation:

Staff employed by the organisation

Technically Qualified: 10 **Clinical:** 10

Other: 1

Head Office

Sub Scope	Scope Item	Category	Scope Element	
Histopathology and Cytopathology	1051 Histopathology - .01 Processing fixed specimens for Histopathological testing	A	Cut up	▼
Histopathology and Cytopathology	1051 Histopathology - .01 Processing fixed specimens for Histopathological testing	A	Tissue Process	▼

4.3. Review documents uploaded to an event

The CAB will upload documents for you to review on an Event or to all assessors to review. Go to the Documents tab and you will see a list of documents available for the whole team, and a second list that only you will see on the portal. Click on the link to open the document for review:

Overview Visit Plan Logistics Actual Visit Non Conformities Documents

Uploaded Documents

Upload Documents:

Please name the document with your initials and clear description
e.g. AS_Audit Trail v 01..doc

Confirm Upload of	Confirmed
Preliminary Report	<input type="checkbox"/>
Pre-Assessment Report	<input type="checkbox"/>
Summary Report	<input type="checkbox"/>
Audit Trail	<input type="checkbox"/>

All Documents For The Event

1 record(s) found. Showing 1 - 1

Name	Uploaded On
Process Document for all assessors to view v2.0.docx	20/09/2016 19:08:54

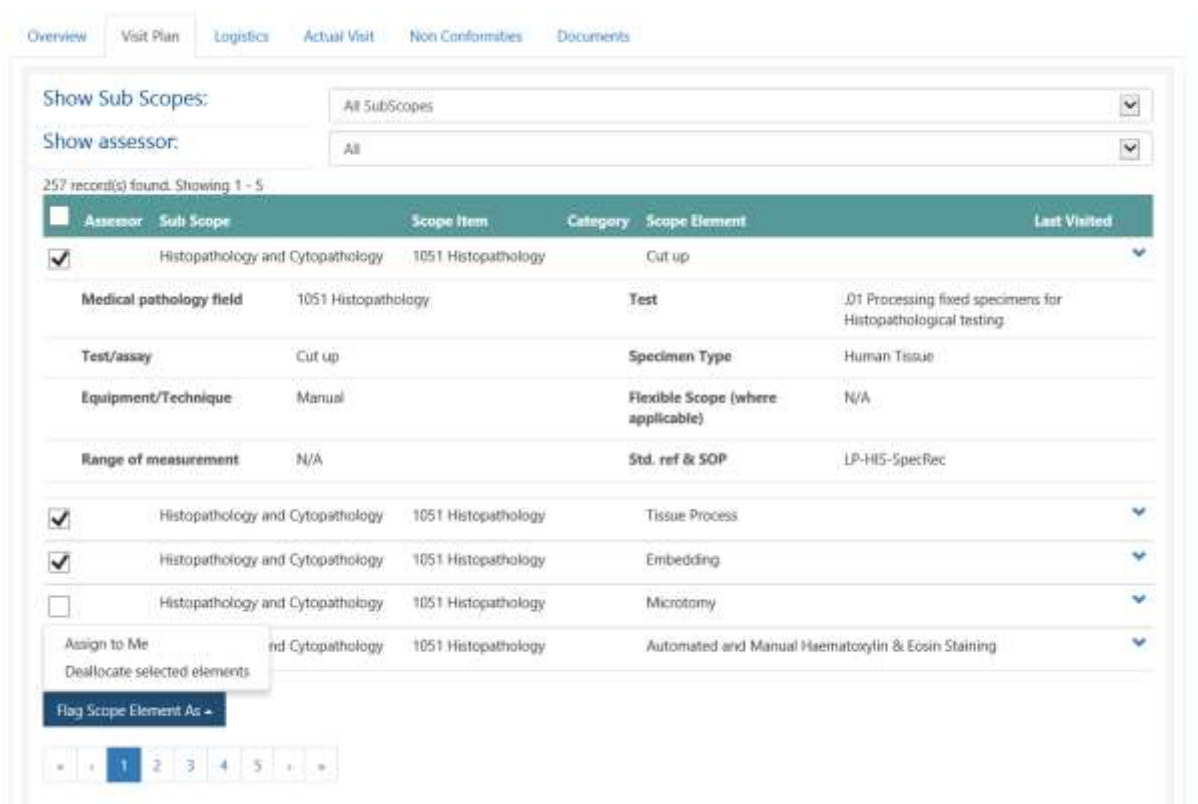
Documents for Training Assessor

1 record(s) found. Showing 1 - 1

Name	Uploaded On
PS10 Documents for Training Assessor.zip	20/09/2016 19:08:01

4.4. View the visit plan and assign scope elements

Each of the scope elements will be listed under the tab Visit Plan:



The screenshot shows the 'Visit Plan' tab in the INAB Assessor Portal. At the top, there are navigation tabs: Overview, Visit Plan (selected), Logistics, Actual Visit, Non Conformities, and Documents. Below the tabs, there are two dropdown menus: 'Show Sub Scopes:' set to 'All SubScopes' and 'Show assessor:' set to 'All'. A message indicates '257 record(s) found. Showing 1 - 5'. The main content is a table with columns: Assessor, Sub Scope, Scope Item, Category, Scope Element, and Last Visited. The table lists five rows of scope elements, each with a checkbox in the Assessor column and a dropdown arrow in the Last Visited column. The first row is checked. Below the table, there is a 'Flag Scope Element As' button with a dropdown arrow. A tooltip is visible over this button, showing 'Assign to Me' and 'Deallocate selected elements'. At the bottom, there is a pagination control showing '1' selected out of 5 pages.

Assessor	Sub Scope	Scope Item	Category	Scope Element	Last Visited
<input checked="" type="checkbox"/>	Histopathology and Cytopathology	1051 Histopathology		Cut up	
	Medical pathology field	1051 Histopathology	Test	.01 Processing fixed specimens for Histopathological testing	
	Test/assay	Cut up	Specimen Type	Human Tissue	
	Equipment/Technique	Manual	Flexible Scope (where applicable)	N/A	
	Range of measurement	N/A	Std. ref & SOP	LP-HIS-SpecRec	
<input checked="" type="checkbox"/>	Histopathology and Cytopathology	1051 Histopathology		Tissue Process	
<input checked="" type="checkbox"/>	Histopathology and Cytopathology	1051 Histopathology		Embedding	
<input type="checkbox"/>	Histopathology and Cytopathology	1051 Histopathology		Microtomy	
<input type="checkbox"/>	Histopathology and Cytopathology	1051 Histopathology		Automated and Manual Haematoxylin & Eosin Staining	

If there are a number of sub scopes you can select a specific one. You can also show what scopes are assigned to another assessor or which are unassigned as yet.

If you wish to see more information on the scope element then click the down arrow on the right and it will show all the information for the scope element. The date this scope element was previously assessed will be shown.

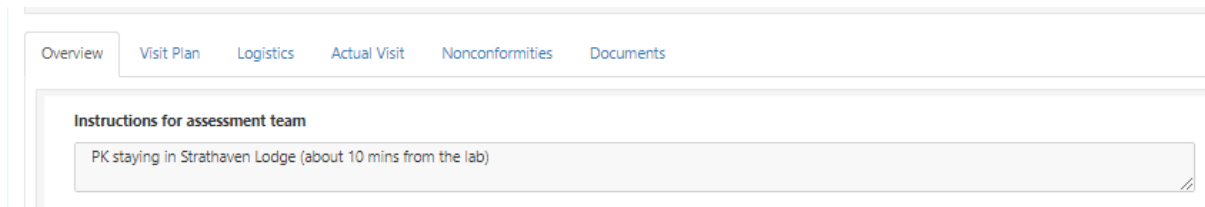
Select the scope elements you plan to witness on the event and click Assign to Me which is located under the Flag Scope Element As button. The scope elements are paginated so ensure you go through each page.

If you make a mistake click on the one you have assigned and choose the option 'Deallocate selected elements'.

4.5. View the event logistics

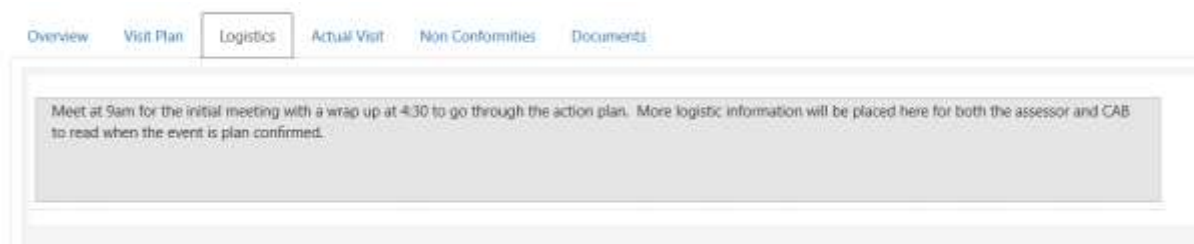
The INAB assessment manager organising the event will add Instructions for the Assessment Team. This may include hotel recommendations, reminders from previous year's assessment, or instructions for this year's assessment.

This field is not visible to the CAB.



The Logistics will be on the Logistics tab when the INAB assessment manager has set the event to plan confirmed.

This field is visible to both the CAB and the assessment team.



4.6. View the actual visit and selected scope elements

Once an event is at status plan confirmed the scope elements on the Visit Plan are locked. In the drop down menu for Show Assessor, select your own name and your plan will be shown.

Overview Visit Plan Logistics Actual Visit Non Conformities Documents

Show Sub Scopes: All SubScopes

Show assessor: Training Assessor

27 record(s) found. Showing 1 - 5

Assessor	Sub Scope	Scope Item	Category	Scope Element	Last Visited
Training Assessor	Histopathology and Cytopathology	1051 Histopathology		Cut up	
Training Assessor	Histopathology and Cytopathology	1051 Histopathology		Tissue Process	
Training Assessor	Histopathology and Cytopathology	1051 Histopathology		Embedding	
Training Assessor	Histopathology and Cytopathology	1051 Histopathology		Microtomy	
Training Assessor	Histopathology and Cytopathology	1051 Histopathology		Automated and Manual Haematoxylin & Eosin Staining	

On the Actual Visit you will be able to record what elements you witnessed and the any others which may not have been in the original plan. Select scope elements assigned to you, then select the ones which were:

1. Witnessed by me
2. Related to tests (or scope elements) witnessed by me
3. Not Assessed – there could be a valid reason why this could not be checked on the day
4. File Review (for CB/IB/VV only)
5. Assessed by document review
6. Clear selected Flags

Overview Visit Plan Logistics Actual Visit Non Conformities Documents

Show Sub Scopes: All SubScopes

Show assessor: Training Assessor

27 record(s) found. Showing 1 - 5

<input type="checkbox"/>	Assessor	Flag	Sub Scope	Scope Item	Category	Scope Element	Last Visited
<input checked="" type="checkbox"/>	Training Assessor	Assigned	Histopathology and Cytopathology	1051 Histopathology		Cut up	
<input checked="" type="checkbox"/>	Training Assessor	Assigned	Histopathology and Cytopathology	1051 Histopathology		Tissue Process	
<input type="checkbox"/>	Training Assessor	Assigned	Histopathology and Cytopathology	1051 Histopathology		Embedding	
				1051 Histopathology		Microtomy	
				1051 Histopathology		Automated and Manual Haematoxylin & Eosin Staining	

Witnessed by Me
Related to tests witnessed by me
Not Assessed
File review (certification/inspection/verification body only)
Assessed by documentation review only
Clear selected flags

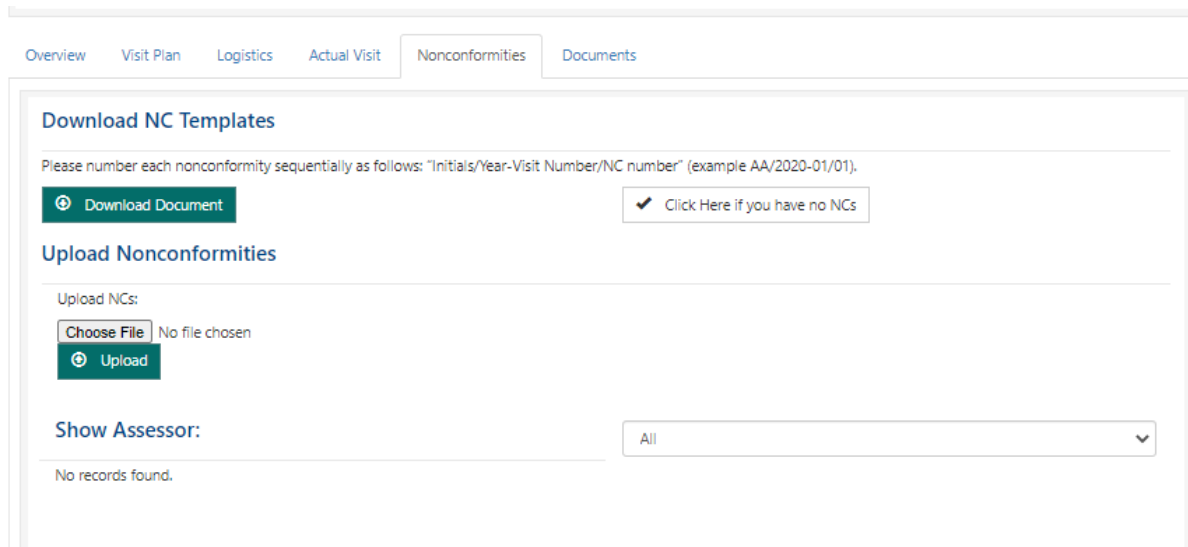
Flag Scope Element As

If you witnessed scope elements which were not assigned to you, change the Show assessor to either all or unassigned. Then you can select the item which you did in fact witness or which was related to scope elements and choose that option.

Note this applies both to laboratory assessments and to assessments of certification and inspection bodies.

4.7. Download NC template and upload NCs

When the event is at Plan Confirmed and you have confirmed your availability for the event, you will be able to download the NC template in preparation for the visit:



Overview Visit Plan Logistics Actual Visit **Nonconformities** Documents

Download NC Templates

Please number each nonconformity sequentially as follows: "Initials/Year-Visit Number/NC number" (example AA/2020-01/01).

[Download Document](#) [Click Here if you have no NCs](#)

Upload Nonconformities

Upload NCs:

[Choose File](#) No file chosen

[Upload](#)

Show Assessor:

No records found.

Click on the download document button. This will open a dialog like such:



If you press save then it downloads to your download folder. Select save as and save to a folder on your computer.

I have no NCs after a visit:

If you have identified no non-conformities during the assessment, select the option “Click here if you have no NCs”. You will be asked for some additional information:

Warning: If you submit this form, you will NOT be able to add any Non Conformities later

Please provide a comment as to why there are No Non Conformities associated with this Event

Fill in the reasons there are no NCs and click on submit. You will not be able to submit NCs later for this event.

I have NCs after a visit:

If you have identified non-conformities, complete the template you previously downloaded.

In Excel you may need to click on the enable editing button.

Assessment- CAS NAME	Classification	Extension to Scope	Standard Ref	Observation Number	INAB Observation	Evidence Required	Proposed Response

Do not delete the first row of the file. This line enables the CRM to assign the NC’s to the correct event and assessor.

Classification, extension to scope and whether evidence required must be selected from the drop down menu. You cannot type ‘Yes or No’ into this field.

The other fields are free text. You must complete each field in a row.

Please number each nonconformity sequentially as follows: “Initials/Year-Visit Number/NC number” (example AA/2020-01/01).

Classification	Extension to Scope	Standard Ref	Observation Number	INAB Observation	Root Cause Analysis Required	Cab Response
Minor	No				No	
Major	No				Yes	
Minor	Yes				No	

When this is uploaded batches will be created, a maximum of three batches are created:

1. Major
2. Minor
3. Extension to scope

Each batch will have different deadlines for the NCs to be responded to. After upload the NCs will appear for the CAB immediately in their portal to respond to.

Upload NCs

To upload the NCs click on the browse button:

The screenshot shows the 'Nonconformities' tab in a web application. At the top, there are navigation tabs: Overview, Visit Plan, Logistics, Actual Visit, Nonconformities (selected), and Documents. Below the tabs, there is a section titled 'Download NC Templates' with a sub-header. Under this section, there is a text instruction: 'Please number each nonconformity sequentially as follows: "Initials/Year-Visit Number/NC number" (example AA/2020-01/01)'. There are two buttons: 'Download Document' and 'Click Here if you have no NCs'. Below this is the 'Upload Nonconformities' section. It has a sub-header 'Upload NCs:' followed by a 'Choose File' button and the text 'No file chosen'. There is also an 'Upload' button. Below that is a 'Show Assessor:' label and a dropdown menu currently set to 'All'. At the bottom of this section, it says 'No records found.'

Select the file you filled out when with the CAB.

If you try to upload NC's form a different CAB or assessment event then you will be informed of this and they will not load:

! Sorry, the non conformities could not be uploaded.

- This template does not match the visit.

If there are issues with the file you will also be told what is wrong:

! Sorry, the non conformities could not be uploaded.

- Row 3: Standard Ref is required
- Row 3: Observation Number is required
- Row 3: INAB Observation is required
- Row 3: Cab Response is required

This error is shown if you did not choose Yes or No from the drop down but wrote something in the cell:

- ❗ Sorry, the non conformities could not be uploaded.
 - Row 3: Relates to scope extension is required.

When all entries in the template are correct the file will upload and a number of batches will be created:

Overview | Visit Plan | Logistics | Actual Visit | Non Conformities | Documents

🟢 The Non Conformities were successfully uploaded for the Event.

Show Assessor:

3 record(s) found. Showing 1 - 3

View Batch	Assessor	Classification	Extension to Scope	Cleared	Number of Non Conformities	Clearance Attempts	Root Cause Analysis Required	Assigned To	Due By	Days
View Batch	Training Assessor	Major	No	Not Cleared	3	1	Yes	Training CAB		
View Batch	Training Assessor	Minor	No	Not Cleared	1	1	No	Training CAB		
View Batch	Training Assessor	Minor	Yes	Not Cleared	1	1	No	Training CAB		

Notice the batches are assigned to the CAB to provide corrective actions. If other assessors upload their NCs you can filter to show only your NCs.

4.8. Review and respond to CAB corrective actions

When the CAB responds on NC batches they will submit the whole batch and it will be assigned to the assessor who raised them. You will receive an email with the deadline you have to respond to the batch. The email will detail to which CAB and to which event the batch belongs.

When you open the event Non Conformities tab, you will see your name on the 'assigned to' field and the date the batch is due to be submitted by:

Overview Visit Plan Logistics Actual Visit **Non Conformities** Documents

Show Assessor:

3 record(s) found. Showing 1 - 3

View Batch	Assessor	Classification	Extension to Scope	Cleared	Number of Non Conformities	Clearance Attempts	Root Cause Analysis Required	Assigned To	Due By	Days
View Batch	Training Assessor	Major	No	Not Cleared	3	1	Yes	Training Assessor	11/10/2016	20
View Batch	Training Assessor	Minor	No	Not Cleared	1	1	No	Training CAB		
View Batch	Training Assessor	Minor	Yes	Not Cleared	1	1	No	Training CAB		

Click on View Batch:

Annual Surveillance

Name	Training CAB	Site Name	HQ
Event Type	Annual Surveillance	Standard	ISO 17025 C
Start Date	20/09/2016	Sub Scopes	Metrology
End Date	20/09/2016	All NCs:	3 2 0
Status	Addressing NCs		

Non Conformities in this Batch

Assessor	Training Assessor	Assigned To	Training Assessor	
Classification	Major	Due By	11/10/2016	
Extension to Scope	No	Days	20	

3 record(s) found. Showing 1 - 3

Filter by Status:

Observation number	Standard Ref.	Status	Clearance Attempt	Last Updated
TC 2016/01/01	Ref 123	Not Cleared	1	20/09/2016
TC 2016/01/02	Ref 124	Not Cleared	1	20/09/2016
TC 2016/01/03	Ref 125	Not Cleared	1	20/09/2016

Click on the first observation number:

Annual Surveillance

Non Conformity Event Record

Cab Name:	Training CAB
Site Name	HQ
Observation Number	TC 2016/01/01
Standard Reference	Ref 123
Status	Not Cleared
INAB Observation	Process document not detailed enough 1
Classification	Major
Root Cause Analysis Required	Yes
Extension to Scope	No
CAB Response	Document to be updated 1

Clearance Attempt Documents

Clearance History

Edit Details

Attempt Number	1
CAB Update	See document attached with the new processes.
Assessor Comments*	

Previous NC Return to Batch

Next NC

You can see any documents the CAB uploaded on the Documents tab. To respond to the CAB update click on Edit Details:

Clearance Attempt Documents

Clearance History

Cancel

Save Details But Do not Clear

Save Details and Clear

Attempt Number	1
CAB Response	Please find attached. <small>This should include an analysis of the extent and cause of the nonconformity and also a description of the corrective action(s) planned or already taken. If evidence of corrective action(s) is required, this will have been indicated by the assessor</small>
Assessor Comments*	

Previous NC Next NC

Return to Batch Submit to INAB

Enter in your comment on the corrective action and if you think it is not cleared click on the “Save Details But Do not Clear.” If you are happy with the CAB response click on Save Details and Clear.

You can then click on the Next or Previous NC button. All NCs need to be flagged as cleared or not and comments added in.

Note: There is a 2000 character limit on the assessor comments field. An error message will be displayed if comment text is in excess of this limit.

Clearance Attempt Documents

Clearance History

[Edit Details](#)

Attempt Number	1
CAB Response	Please find attached. <small>This should include an analysis of the extent and cause of the nonconformity and also a description of the corrective action(s) planned or already taken. If evidence of corrective action(s) is required, this will have been indicated by the assessor</small>
Assessor Comments*	NC Cleared. This was an isolated event. The CAB has completed a root cause analysis and submitted evidence of corrective actions.

[Previous NC](#) [Next NC](#) [Return to Batch](#) [Submit to INAB](#)

When you have entered a comment and decided on clearance status of each NC, the 'Submit to INAB' button will become available for selection.

Select your Recommendation and Submit.

Submit To INAB

Recommendation on NC Batch*

Reason*

Are you sure you want to submit your updates to INAB?

[Cancel](#) [Submit](#)

Please select a recommendation
Maintain Accreditation for Existing Scope
Award Accreditation for Scope / Extension
Defer Decision Until after NC Cleared
Follow-Up Visit Required
Other

If there are have been a number of attempts to clear an NC you will be able to see the history; for example this NC is on its second attempt:

Clearance Attempt Documents

Clearance History

[Edit Details](#)

Attempt Number	2 (See Previous)
CAB Update	Another document uploaded with more details.
Assessor Comments*	

[Previous NC](#) [Return to Batch](#) [Next NC](#)

Click on see previous to see the interaction on the previous attempts along with the documents.

Note that the document linked to the current attempt is on the documents tab:

Clearance History

Attempt Number	1
CAB Update	See document attached with the new processes.
Assessor Comments	This is not enough information.

Documents

1 record(s) found. Showing 1 - 1.

Name	Uploaded On
Process Document v1.0.docx	20/09/2016 16:41:40

[Close](#)

Until a batch is closed each time the CAB submits a batch you will receive an email to log into the Portal to review and submit them. All NCs in a batch must be submitted to INAB in one go.

4.9. Upload documents to an event

Documents may be uploaded during or after an event. Select the document by clicking on browse and clicking upload document. Confirm which document type it is and clicking save. These will be uploaded to the event and all assessors will be able to see the document immediately. Following review, INAB will release the document to the CAB.

Remember you don't upload NCs here, go to the Nonconformities tab for this (see 4.7).

Overview Visit Plan Logistics Actual Visit Non Conformities Documents

Uploaded Documents

Upload Documents:

Please name the document with your initials and clear description
e.g. AS_Audit Trail v 01..doc

Confirm Upload of	Confirmed
Preliminary Report	<input type="checkbox"/>
Pre-Assessment Report	<input type="checkbox"/>
Summary Report	<input type="checkbox"/>
Audit Trail	<input type="checkbox"/>

All Documents For The Event

1 record(s) found. Showing 1 - 1

Name	Uploaded On
Process Document for all assessors to view v2.0.docx	20/09/2016 19:08:54

Documents for Training Assessor

1 record(s) found. Showing 1 - 1

Name	Uploaded On
PS10 Documents for Training Assessor.zip	20/09/2016 19:08:01

5. My NC Batches

As NC batches can be on a number of events you have a page which shows all the NC Batches which are assigned to you. It is a list which you can click on and review:

My Non Conformity Batches

2 record(s) found. Showing 1 - 2

View Batch	Event Title	Event Type	Event Start Date	Classification	Number of Non Conformities	Due By	Days
View Batch	Pre Assessment	Initial Assessment	15/09/2016	Minor	1	14/12/2016	33
View Batch	Annual Surveillance 2	Annual Surveillance	20/09/2016	Major	3	19/10/2016	-23

Select the batch you wish to respond to by clicking view batch. Follow the instructions from section 4.8.

6. My Claims

When you click on my claims you can filter on claims raised which are at a status of:

- Draft: you are still editing the claim (or it was rejected and changes need to be made)
- Submitted: the claim is being reviewed by INAB
- Paid: the claim has been paid, it could take up to three days to be in your bank account.
 - Note that in accordance with Irish Tax Law and the HSA/INAB Terms and Conditions, 20% withholding tax is withheld from the full expense claim. This 20% can be refunded in full by the Irish Revenue on submission of the F/45 form accompanying payment.

You can click on 'View Claim' to see the information on the claim or keep working on it if it is still in draft:

The screenshot shows the 'My Claims' page with a navigation bar at the top containing 'My Events', 'My Claims', 'My Profile', and 'Library'. Below the navigation bar, the page title 'My Claims' is displayed. A 'Show Claims:' section includes a dropdown menu with options: 'All', 'Draft', 'Submitted', and 'Paid'. Below the dropdown, there is a table with the following data:

View Claim	Claim Name	Event Type	Event Start Date	Submitted Date	My Reference	Total (€)	Status
View Claim	Training CAS	Initial Assessment	15/09/2016	15/09/2016	Groite visit	131.36	Submitted
View Claim	Training CAS	Annual Surveillance	20/09/2016	20/09/2016	My first claim	1107	Draft

6.1. Add Claim

For each event you can submit one claim. You may only submit claims after the visit has happened. When an Event is at the following statuses you can add a claim, i.e. the event has taken place:

- Addressing NCs
- Ready for a decision
- Closed

Via my Events you can select an event which is at the correct status:

Type	Start Date	End Date	CAB	Event Status
First Surveillance	14/03/2017	15/03/2017	Training CAB	Plan Confirmed
Annual Surveillance	20/09/2016	20/09/2016	Training CAB	Addressing NCs
Document Assessment / Review	20/09/2016	20/09/2016	Beaumont Hospital	Team Confirmed
First Surveillance	20/09/2016	20/09/2016	Beaumont Hospital	Plan Confirmed
Witnessed Audits	20/09/2016	20/09/2016	Beaumont Hospital	Addressing NCs

If you have not yet made a claim for the event the Add Claim button will appear when you select the event:

CAB Name:	Training CAB	Site Name:	HQ
Event Type:	Annual Surveillance	End Date:	20/09/2016
Start Date:	20/09/2016	Visits to this CAB: 2, by me: 2	
Status:	Addressing NCs	Non Conformities recorded against this CAB: 5, by me: 5	
Standard:	ISO 17025 C	My NCs:	1 (Red), 2 (Yellow), 2 (Green)
Sub Scopes:	Metrology	All NCs:	1 (Red), 2 (Yellow), 2 (Green)
INAB Officer:	Stephen Moylan		

This opens a screen through which you can add your claim reference and/or review the information to ensure this is the correct event the claim is for.

You may enter any reference number you wish to the 'My Reference' field. This will appear on payment record and will allow you to link INAB payment with the event. If you are claiming through a company account, please enter the company accounts department reference number. This will allow them to link payment from INAB to you.

Add Claim

Details	
Event Start Date	13/11/2016
My Reference*	<input type="text"/>
Currency	Euro
Daily Rate	100
CAB Name	Smoke Test
Site	Head Office
Accreditation	338MT for ISO 15189
<i>Please ensure that in order to facilitate prompt payment, you have sent the current Tax Clearance Certificate (TCC) to finance@hsa.ie</i>	
<input type="button" value="X Cancel"/>	<input type="button" value="Save"/>

When you press save the full claim form opens:

Edit Claim

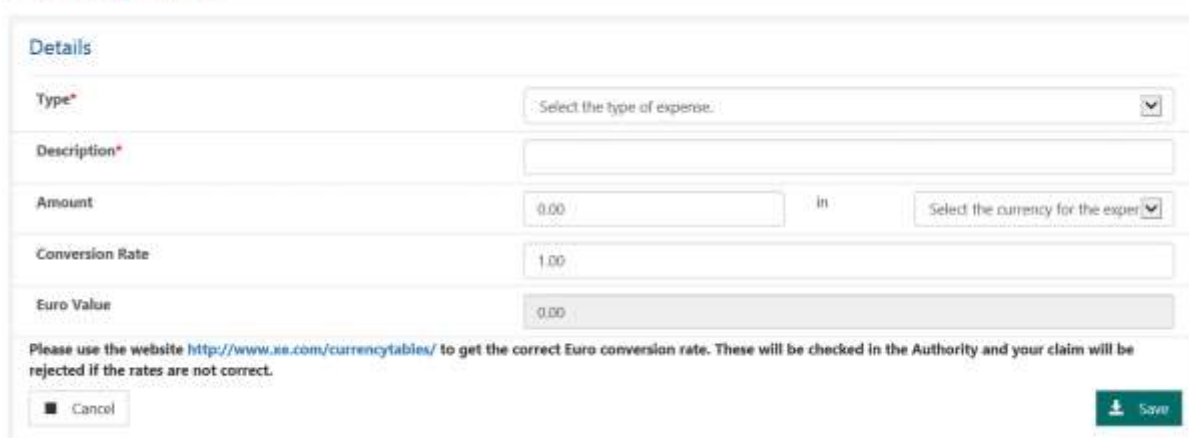
Details		Summary Details	
Event Start Date	13/08/2020	Total Fees and Expenses (ex VAT)	<input type="text" value="0.00"/>
Event Type	Annual Surveillance	VAT @ 0%	<input type="text" value="0.00"/>
My Reference	Test	Total Claim before PSWT (€)	<input type="text" value="0.00"/>
Daily Rate	0	<i>Please note that in accordance with Irish Tax Law and the HSA/INAB Terms and Conditions, 20% withholding tax is withheld on the full expense claim. This 20% can be refunded in full by the Irish Revenue on submission of the F/45 form accompanying payment.</i>	
Status	Draft	<input type="button" value="Withdraw Claim"/> <input type="button" value="Submit Claim"/>	
Status Message		<p>As per Schedule A-1 (Business Rules for INAB Assessors) please submit the following through the INAB Portal before you submit your claim:</p> <ul style="list-style-type: none"> Complete and upload your x116 report to the event (Documents). Complete the Nonconformity template and upload to the event (Nonconformities) Confirm which scope elements were assessed or are related to those which were assessed (Actual Visit). <p>Failure to do so will result in rejection of your expense claim by the assessment manager.</p>	
CAB Name	Barringtons Hospital Limited		
Site	Head Office		
Accreditation	349MT for ISO 15189		
<input type="button" value="Fees and Expenses"/> <input type="button" value="Receipts"/>			
<h3>Fees and Expenses</h3> <input type="button" value="+ Add Expense"/>			
Type	Description	Local Value	Euro Value

Until you submit the claim you can keep adding expense line items and receipts. The claim is made up of a number of line items which are of type:

- Standard Hours – Professional Fee
- Pre/Post Hours – Professional Fee
- Travel – Air
- Travel – Bus or Train
- Travel – Car
- Hotels
- Meals
- Other

To start click on Add Expense:

Add Expense



Details

Type*

Description*

Amount in

Conversion Rate

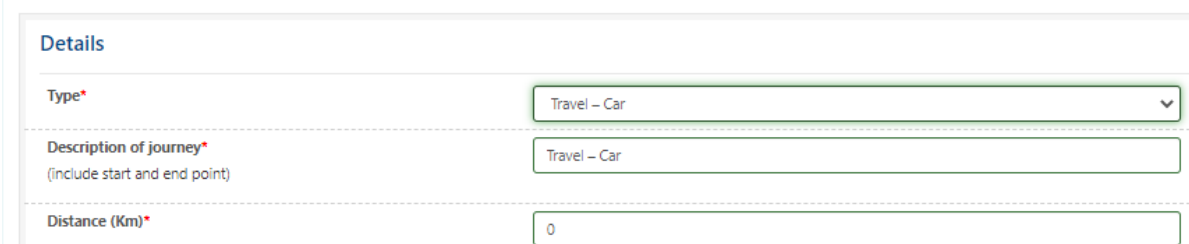
Euro Value

Please use the website <http://www.ecb.com/currencytables/> to get the correct Euro conversion rate. These will be checked in the Authority and your claim will be rejected if the rates are not correct.

You must choose the type of expense - this then prepopulates the description. If you select 'Other' then you need to provide the description.

If the expense relates to "Travel – Car" then the distance travelled in Kilometers must be entered. Please also include start and end location in description.

Add Expense



Details

Type*

Description of journey*
(include start and end point)

Distance (Km)*

If the expense relates to standard hours or pre/post hours then the number of hours spent must be entered. Ensure that standard assessment time, pre-assessment, and post-assessment review are each entered as separate line items.

Select appropriate currency for line item. On one claim you can have a number of currencies.

Enter in the local value of the claim e.g. if you paid for your airline tickets in Krona then enter the amount of Krona you spent in the local value field.

If the currency is not Euro then enter in the conversion rate for the day the expense was incurred. There is a link to an exchange site to find the correct rate. This will then calculate the Euro value and you can save the item.

Example of a non-Euro item:

Add Expense

Details			
Type*	Travel - Air		
Description*	Travel - Air		
Amount	4500	in	Swedish Krona
Conversion Rate	0.10		
Euro Value	450.00		
<small>Please use the website http://www.ae.com/currencytables/ to get the correct Euro conversion rate. These will be checked in the Authority and your claim will be rejected if the rates are not correct.</small>			
<input type="button" value="Cancel"/>			<input type="button" value="Save"/>

To upload your receipts, click on the receipts tab and select the document you wish to upload. You can upload as many documents as you wish:

Fees and Expenses	Receipts
Upload Documents:	
<input type="text" value=""/> <input type="button" value="Browse..."/>	
<input type="button" value="Upload"/>	
No records found.	

Edit Claim

Details

Event Start Date	20/09/2016
Event Type	Annual Surveillance
My Reference	My first claim
Daily Rate	1050
Status	Draft
Status Message	
CAB Name	Training CAB
Site	HQ
Accreditation	312C for ISO 17025 C

Summary Details

Total Fees and Expenses (ex VAT):	900.00
VAT @ 23%:	207.00
Total Claim before PSWT (€)	1107.00

Please note that in accordance with Irish Tax Law and the HSA/INAB Terms and Conditions, 20% withholding tax is withheld on the full expense claim. This 20% can be refunded in full by the Irish Revenue on submission of the F/45 form accompanying payment.

Withdraw Claim

Fees and Expenses Receipts

Fees and Expenses

Type	Description	Local Value	Conversion	Euro Value
Standard Hours - Professional Fee	Standard Hours - Professional Fee	450.00	1.00	€450.00
Travel - Air	Travel - Air	450.00	0.10	€45.00

At any point when in draft you can withdraw your claim. This means you can start the claim again if you have uploaded incorrect receipts or items.

When claim is complete, submit to INAB. When it is submitted you can only view the claim, you cannot add new expense items.

6.2. Resubmit a rejected claim

If there is an issue with your claim the INAB assessment manager will reject it and you will receive an email and a portal task with the reason why it was rejected e.g.

An Expense Claim in relation to work you carried for INAB has been rejected.

CAB: Training CAB
Claim Reference: My first claim
Amount (Euro): €1,107.00
Comment: A receipt is missing for the airline ticket. Please attach and resubmit.
Please log into your INAB Assessor Portal to view the Claim.

Best Regards,
- The INAB Team

Common reasons for rejecting a claim include:

- Missing receipts
- Failure to adhere to business rules regarding car hire, public transport
- Absence of start-end points for mileage claims

When you open the claim you will see the status message below:

Edit Claim

Details	
Event Start Date	13/08/2020
Event Type	Annual Surveillance
My Reference	Test
Daily Rate	0
Status	Draft
Status Message	
CAB Name	Barringtons Hospital Limited
Site	Head Office
Accreditation	349MT for ISO 15189

Summary Details	
Total Fees and Expenses (ex VAT)	100.00
VAT @ 0%	0.00
Total Claim before PSWT (€)	100.00

Please note that in accordance with Irish Tax Law and the HSA/INAB Terms and Conditions, 20% withholding tax is withheld on the full expense claim. This 20% can be refunded in full by the Irish Revenue on submission of the F/45 form accompanying payment.

As per Schedule A-1 (Business Rules for INAB Assessors) please submit the following through the INAB Portal before you submit your claim:

- Complete and upload your x116 report to the event (Documents),
- Complete the Nonconformity template and upload to the event (Nonconformities)
- Confirm which scope elements were assessed or are related to those which were assessed (Actual Visit).

Failure to do so will result in rejection of your expense claim by the assessment manager.

You can either withdraw the claim and start again, or add more receipts/change the line items and then re-submit the claim e.g. to change the price of a flight open up the line item and make the change and save:

Edit Expense

Details	
Type*	Travel - Air
Description*	Travel - Air
Amount	4500.00 in Swedish Krona
Conversion Rate	0.09
Euro Value	405.00

Please use the website <http://www.xe.com/currencytables/> to get the correct Euro conversion rate. These will be checked in the Authority and your claim will be rejected if the rates are not correct.

When you submit the claim the INAB assessment manager will review the claim again.

7. My Profile

The assessor profile is split up into different areas which are all covered below.

7.1. My profile – assessor information and password

Assessor Information and Change Password

This page displays the information which was supplied when you completed the profile wizard:

Assessor Information

Title	Dr	Do you wish to be contracted to INAB:	On a company contract basis
First name	PK	Company name	DFGDAS
Last name	TestOct20	Are you registered to pay VAT in Ireland?	Yes
Address	sefasef	VAT number	34523452334
		Website	
County	kildare	Position held in current employment	eawse
Postcode/Eircode		Number of years in this position	2
Country	Ireland	Daily rate (8 hour basis)	455
Email	pksubs1@gmail.com	Currency	Euro
Telephone	1234		
Mobile	5678		
Summarise relevant work experience to support the assessment role. Include the number of years you worked in relevant areas.	ASDA		
Have you worked with any INAB accredited CAB? If yes, provide detail including CAB name, role and duration of work	asd		
Are you actively working with another accreditation body (AB)?	Yes		
If you answered yes to the above, please document the AB, the number of assessments in the last 12 months and your role in those assessments.	eswafsd		
Lead assessor experience	FCZ		
Lead assessor training (mandatory to add a document)			
Other quality management experience (include number of years)	XCVZXC		
Other quality management training	ZXCVZ		

[Change Password](#) [Edit Details](#)

From here you can change your password or edit your details. Clicking on edit details the following fields can be changed:

Update your Profile



Assessor Information

Title*	<input type="text" value="Dr"/>	Telephone*	<input type="text" value="1234"/>
First name*	<input type="text" value="PK"/>	Mobile*	<input type="text" value="5678"/>
Last name*	<input type="text" value="TestOct20"/>	On a company contract basis	
Address*	<input type="text" value="sefasef"/>	Company name	<input type="text" value="DFGDAS"/>
	<input type="text"/>	Are you registered to pay VAT in Ireland?	<input type="text" value="Yes"/>
	<input type="text"/>	VAT number	<input type="text" value="34523452334"/>
	<input type="text"/>	Company name	<input type="text" value="DFGDAS"/>
Country*	<input type="text" value="Ireland"/>	Website	<input type="text"/>
County	<input type="text" value="kildare"/>	Position held in current employment	<input type="text" value="eawse"/>
Postcode/Eircode	<input type="text"/>	Number of years in this position	<input type="text" value="2"/>
		Daily rate (8 hour basis)	<input type="text" value="455"/>
		Currency	<input type="text" value="Euro"/>

Summarise relevant work experience to support the assessment role. Include the number of years you worked in relevant areas.*	ASDA
Have you worked with any INAB accredited CAB? If yes, provide detail including CAB name, role and duration of work*	asd
Are you actively working with another accreditation body (AB)?*	Yes
If you answered yes to the above, please document the AB, the number of assessments in the last 12 months and your role in those assessments.	asdasd
Lead assessor experience	FCZ
Lead assessor training (mandatory to add a document)	
Other quality management experience (include number of years)	XCVZXC
Other quality management training	ZXCXZ

Cancel Save Details

If you wish to change your **daily rate, currency** or move from working as an individual to company **contract** or vice versa then you must 'request a change' (covered in section 99). When changes are complete click on Save Details.

To change your password you must enter in your old password and the new one twice:

Change Password

Email	<input type="text" value="mmd@hsa.ie"/>
Old Password	<input type="password"/>
New Password	<input type="password"/>
Confirm Password	<input type="password"/>

7.2. My profile - my qualifications and training

Qualification Type	Qualification Name	Institute Name	Year Awarded	Year Expired
Third Level	SDPSA	SDPA	2345	

Clicking on the qualification name will open up the record which you can review and edit if required.

To add a new qualification and follow guidance in section 3.5.

Add Qualification

Qualification Type*

Qualification Name*

Institute Name*

Year Awarded*

Year of expiry (if applicable)

Certificate*

7.3. My technical expertise

Your areas of technical expertise will be listed as below with their approval status. Follow the steps in section 3.8 add additional competencies.

My Approved Technical Expertise

Standard	Sub-Scope	Role	Approval Status
ISO 17025 T	Acoustic & Vibration Testing		Approved
ISO 15189	Assisted Reproduction	Lead Assessor	Approved
ISO 15189	Audiology	Lead Assessor	Approved
ISO 15189	Blood Transfusion Science	Lead Assessor	Approved
ISO 17025 C	Metrology	Lead Assessor/Technical Expert	Approved

My Technical Expertise

Select Standard:

Sub-scope expertise supported by*

Training
 Experience

Justification (limited to 2000 characters; please use the 'choose files' feature below to upload CV, certificates, or other documentary evidence)*

No file chosen

Please select the expertise fields for which you have supporting evidence. Please consult the INAB website for the latest version of CRM Classification codes to help select the relevant Subscopes.

Search:

	Sub-Scope Level 1	Sub-Scope Level 2	Approval Status
<input type="checkbox"/>	902 Laboratory determination of acoustic characteristics of materials and building elements		
	<input type="checkbox"/>	.01 Reverberation	Not Approved
	<input type="checkbox"/>	.11 Sound absorption	Not Approved

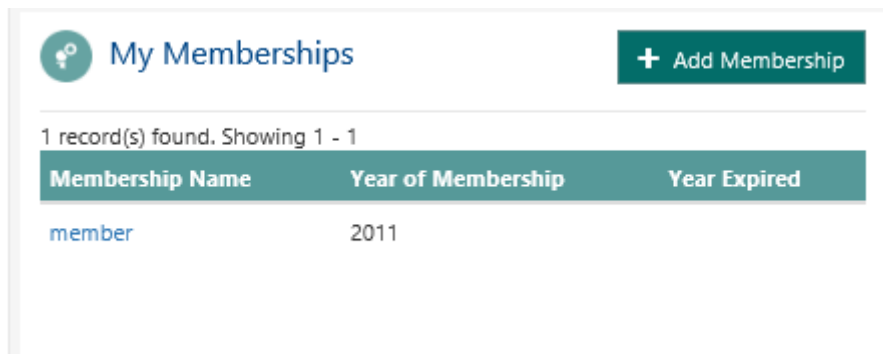
My Competencies

3 record(s) found. Showing 1 - 3

Standard	Sub Scope	Sub Scope Level 1	Sub Scope Level 2	Approval Status
ISO 17025 C	Metrology	121 Hydrometry (specific gravity)	.01 Density hydrometers	Yes
ISO 17025 C	Metrology	122 Emissions	.01 Gas analysers	No
ISO 17025 C	Metrology	102 Length/Distance/Angle/Area	.02 Micrometers	No

7.4. My memberships

All memberships are listed here:



Membership Name	Year of Membership	Year Expired
member	2011	

To view the membership click on the membership name and you can edit it.

To add a membership click on add membership and fill in the mandatory details.



Add Membership

Membership Name*

Year Joined*

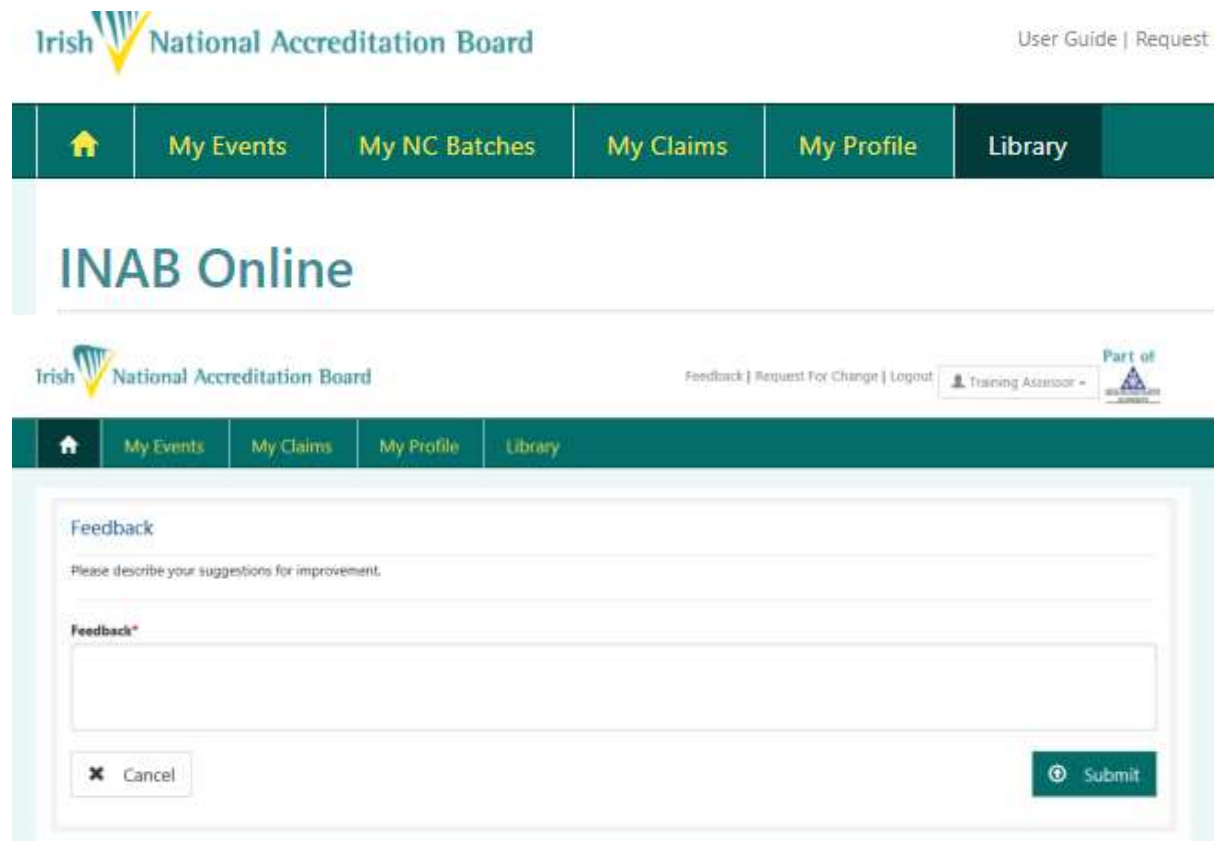
Year Expired

8. Library

You will not have access to the Portal Library until you have been approved.

When your terms and conditions have been signed and you have been marked as 'Active', then you will see a list of documents in the library.

Documents include the various forms for completion on assessment as well as user guides and INAB Terms and Conditions.



The screenshot displays the INAB Online portal interface. At the top, the logo for the Irish National Accreditation Board is visible on the left, and the text 'User Guide | Request' is on the right. Below this is a dark green navigation bar with buttons for 'Home', 'My Events', 'My NC Batches', 'My Claims', 'My Profile', and 'Library'. The main heading 'INAB Online' is prominently displayed. A secondary navigation bar includes the logo, 'Feedback | Request For Change | Logout', a user profile dropdown for 'Training Assessor', and a 'Part of' logo. The primary navigation bar below this has buttons for 'Home', 'My Events', 'My Claims', 'My Profile', and 'Library'. The central content area features a 'Feedback' form with the instruction 'Please describe your suggestions for improvement.' and a text input field. At the bottom of the form are 'Cancel' and 'Submit' buttons.

9. Request for Change

If you require a change on the Profile pages but they are not editable then you must request the change. Click on the top navigation ribbon “Request for Change” and enter in a title and description of the change. Click on submit when complete.



INAB will respond to you regarding this change request.