



INAB CAB Portal User Guide

CRM2

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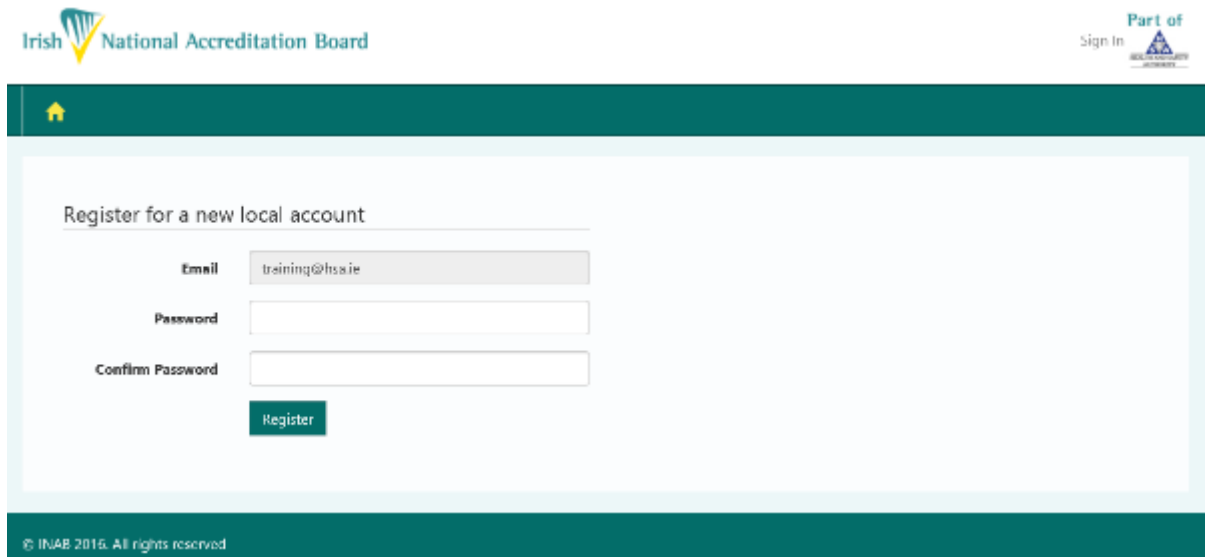
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1.Login

1.1. Set up portal password

An email will be sent with a URL to set up a password for the Portal. Clicking on the link in the email will open a page which has the email pre populated:



Irish National Accreditation Board

Part of Sign In

Register for a new local account

Email

Password

Confirm Password

Register

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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')

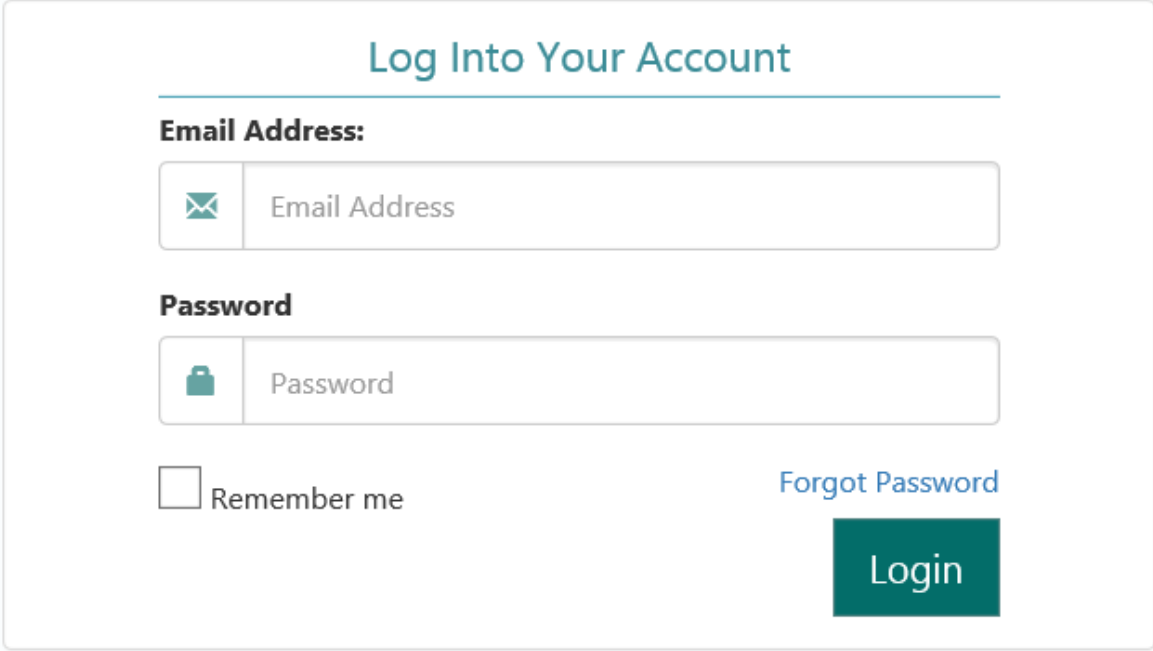
Click on Register. If you have not entered an acceptable password you will be given a warning.

INAB will never know your password.

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

1.2. Login

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

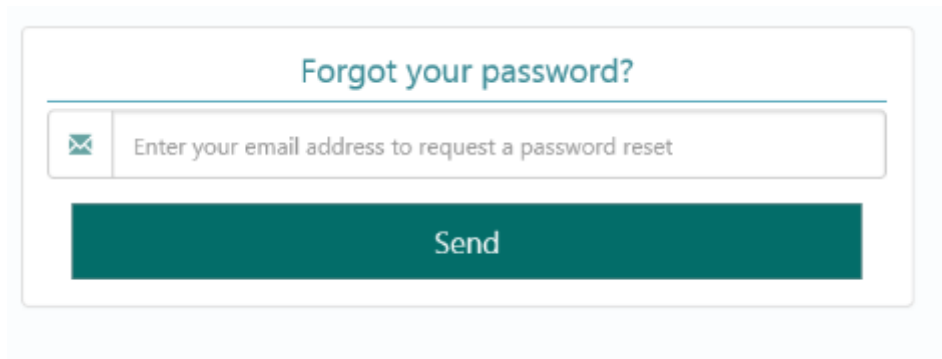


The screenshot shows a login form titled "Log Into Your Account". It features two input fields: "Email Address" with an envelope icon and "Password" with a lock icon. Below the password field is a "Remember me" checkbox and a "Forgot Password" link. A dark teal "Login" button is positioned at the bottom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

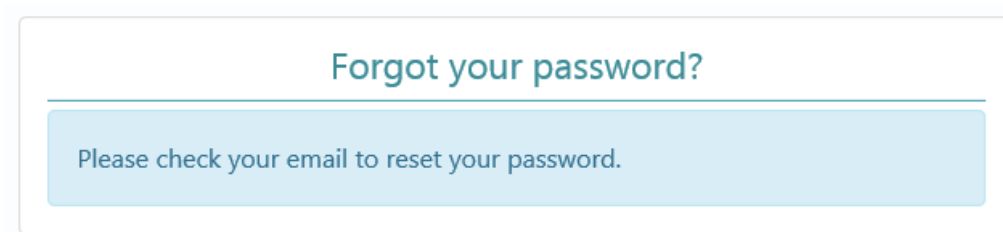
1.3. Forgot my password

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



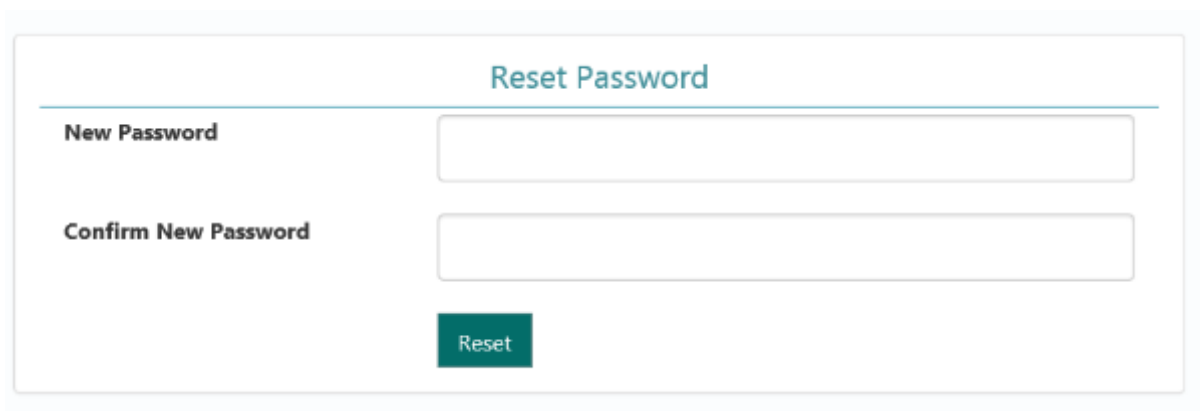
The screenshot shows a form titled "Forgot your password?". It features a text input field with a mail icon on the left and the placeholder text "Enter your email address to request a password reset". Below the input field is a dark teal button labeled "Send".

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



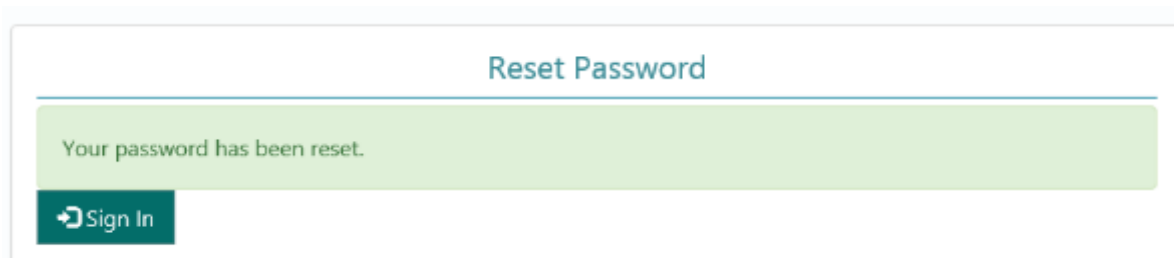
The screenshot shows a confirmation message box titled "Forgot your password?". The message inside the box reads "Please check your email to reset your password."

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 these fields is a dark teal button labeled "Reset".

When a correct password is entered the message will show:



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

1.4. Account locked

If you enter your password incorrectly three times you will get the following message and you will be locked out of system 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

On the homepage you will see information regarding your accreditations. The homepage is split into panels:


- Alerts
- Tasks
- Accreditations/Applications
- Events
- Invoices

2.1. Alerts

Alerts will inform you of items that have happened related to your accreditation or application. In the panel you will see a list.

 Alerts

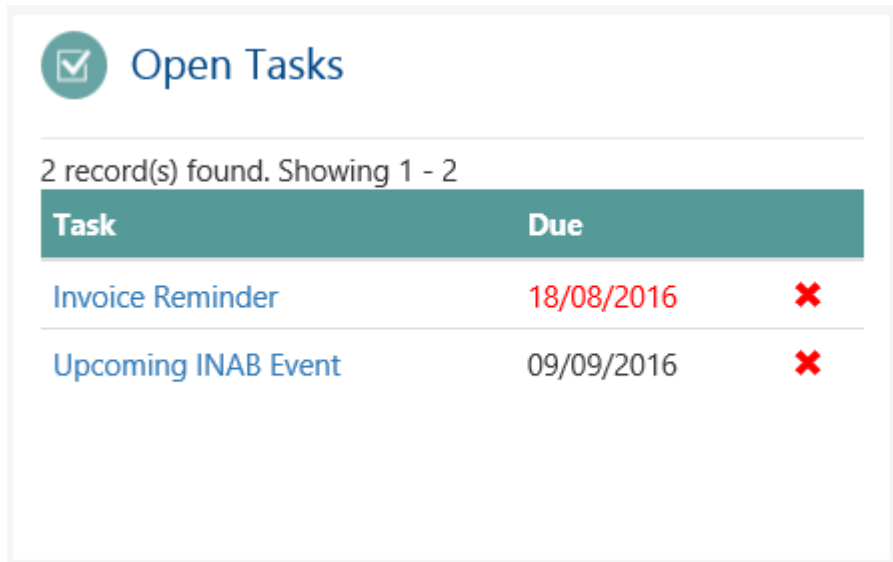
1 record(s) found. Showing 1 - 1

Subject	Description	Date
Application Status Change	Training CAB - ISO 17025 T status changed from Draft to Submitted	29/08/2016 

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

2.2. Tasks

The task view will display items which require an action from the CAB. For example if an invoice is not paid after 30 days, or there is an upcoming event which requires acknowledgement of the team;



Open Tasks

2 record(s) found. Showing 1 - 2

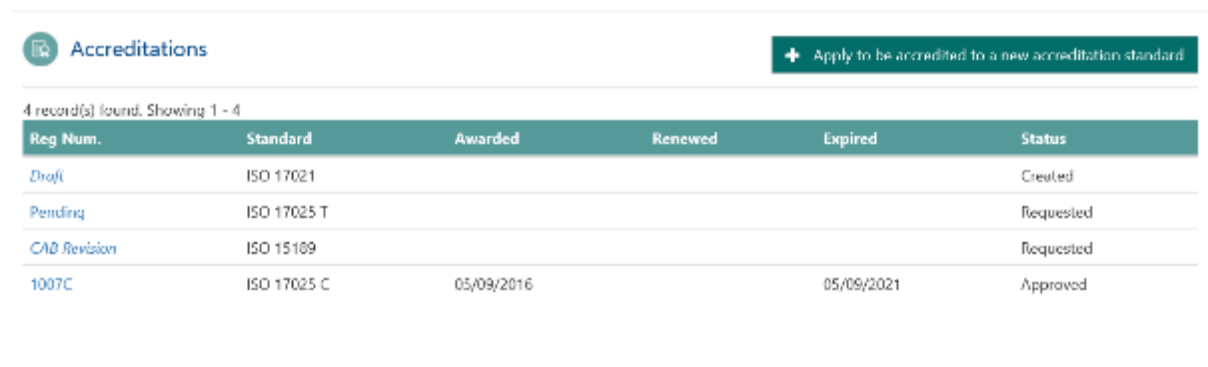
Task	Due	
Invoice Reminder	18/08/2016	✘
Upcoming INAB Event	09/09/2016	✘

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. Accreditations

The accreditations panel shows all accreditations either applied for or on hold:



The screenshot shows the 'Accreditations' panel. At the top left, there is a search icon and the title 'Accreditations'. At the top right, there is a green button with a plus sign and the text 'Apply to be accredited to a new accreditation standard'. Below the button, it says '4 record(s) found. Showing 1 - 4'. The table below has the following columns: Reg Num., Standard, Awarded, Renewed, Expired, and Status.

Reg Num.	Standard	Awarded	Renewed	Expired	Status
Draft	ISO 17021				Created
Pending	ISO 17025 T				Requested
CAB Revision	ISO 15189				Requested
1007C	ISO 17025 C	05/09/2016		05/09/2021	Approved

You can apply for a new standard by clicking on the button “Apply to be accredited to a new accreditation standard”. See section 4.

If the Registration Number is Draft then it has not been submitted to INAB for review. You may keep editing the application and only when it is submitted will it change to Pending.

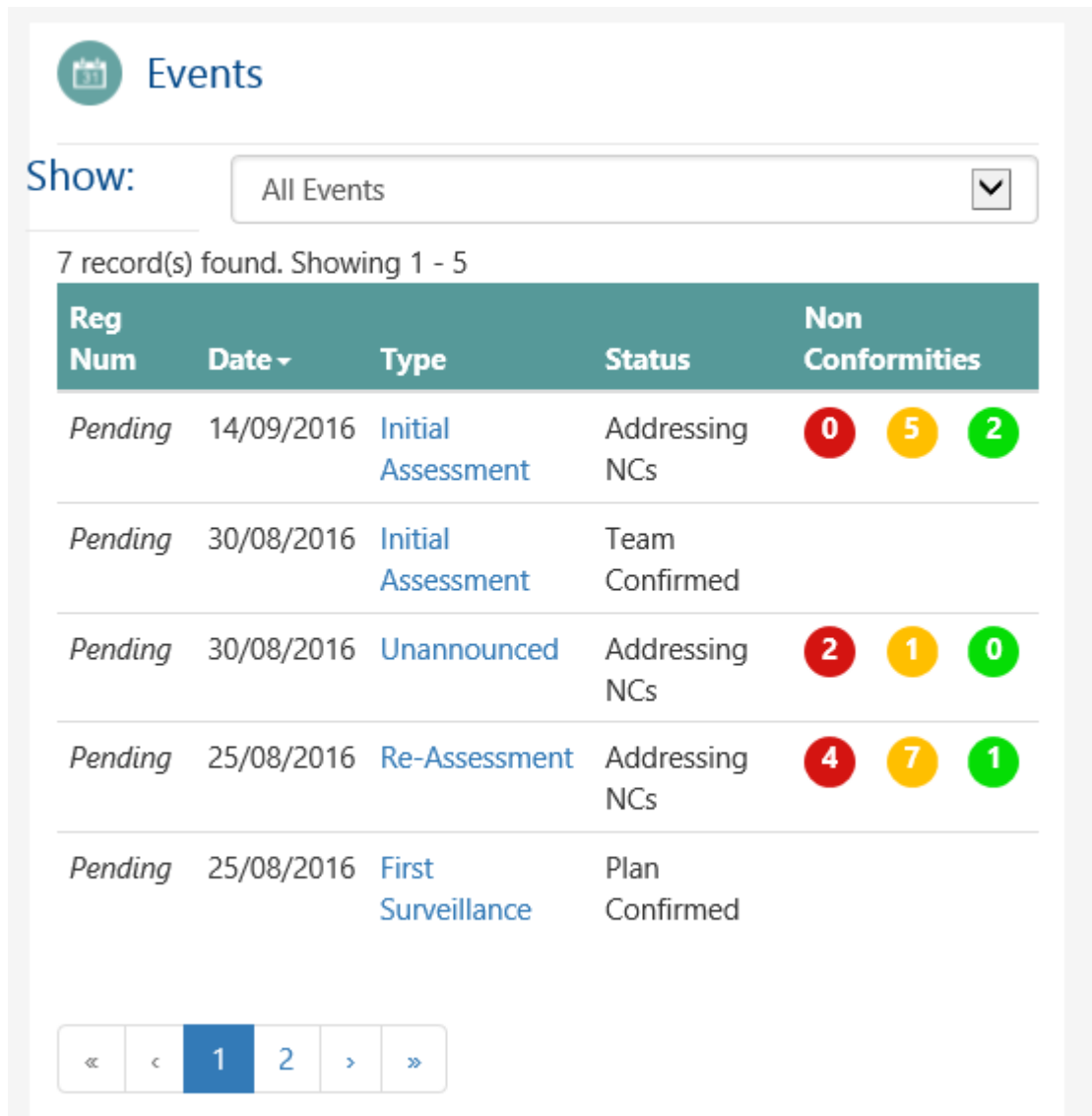
If the Registration Number is Pending then this is still in the application status and is being reviewed by INAB.

If the application requires an update INAB will place the application into CAB Revision. Clicking on CAB Revision will bring you through the application wizard (section 4.1).

If there is an Approved registration number then this is a standard to which you are currently accredited. Clicking on the registration number will open the accreditation information and you will be able to apply for a scope extension (section 5), suspend/withdraw scopes (section 7.4, 7.5), or make minor edits to scopes 7.3.

2.4. Events

The events panel will show all events over any number of standards/applications:



The screenshot shows the 'Events' panel with a search filter set to 'All Events'. It displays 7 records. The table has the following structure:

Reg Num	Date	Type	Status	Non Conformities
Pending	14/09/2016	Initial Assessment	Addressing NCs	0 (red), 5 (yellow), 2 (green)
Pending	30/08/2016	Initial Assessment	Team Confirmed	
Pending	30/08/2016	Unannounced	Addressing NCs	2 (red), 1 (yellow), 0 (green)
Pending	25/08/2016	Re-Assessment	Addressing NCs	4 (red), 7 (yellow), 1 (green)
Pending	25/08/2016	First Surveillance	Plan Confirmed	

At the bottom, there is a pagination control showing page 1 of 2.

The view can be changed to show all current or closed. There is pagination for the events. Any which are at the Non Conformity stage will show the number of major/minor findings and the number cleared in bubbles. By clicking on the headers the order will change. Events are covered in section 6.

2.5. Invoices

Any unpaid invoices will be listed in the fee payment request panel with the date of the invoice:


Fee Payment Requests

3 record(s) found. Showing 1 - 3

Invoice Id	Total Amount	Invoice Date
0000000007	€ 1517.82	18/07/16
0000000008	€ 1517.82	18/07/16
0000000009	€ 1517.82	18/07/16

3.Set up the CAB Profile

Until your profile is complete you will see this message:

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

You cannot apply for an accreditation until the profile is complete. There are three steps to complete in your profile.

3.1. Step 1: CAB information

Fill in all the information required on step 1. If your organisation is VAT exempt you will need to upload your VAT exemption. Items marked with a * are mandatory.

Create Profile

Step 1 of 3 - CAB Information

Organisation Name	Training CAB
Address*	123 High Street
	Street 2
	Street 3
City	
County*	Carlow <input type="checkbox"/>
Postcode	R93 ED82
Telephone*	059 91 75000
Website	http://www.mywebsite.ie
My Organisation	
Legal Status*	Owned by academic institution <input type="checkbox"/>
VAT Exempt*	No <input type="checkbox"/>
CRO Number*	12345
Trading as	Demo Site Inc.

Note: when entering in your company name / organisation please do not use commas, or fullstops or any special symbols.

3.2. Step 2: Set up sites

Each accreditation can have different sites, a default site is Head Office. You can delete this and add a different one or add additional sites at this point by clicking Add Site.

You must add sites before adding scope elements.

If the same activity is being performed at multiple sites, this same scope element will have to be entered separately for each site.

Create Profile

Step 2 of 3 - Sites + Add Site

1 record(s) found. Showing 1 - 1

Name	Location	
HQ	123 High Street, Street 2, Street 3, Carlow	✖

← Save and Go Back Save and Proceed to Next Step →

NB: You should only add in sites (locations of another address) where accredited activity will take place. If you only have one address - you will only have one site. It does not relate to other departments within the same address.

3.3. Step 3: Set up portal contacts

Each CAB can have three contacts who will be emailed by the system.

The primary contact is the account used to fill in the profile, all emails will be sent to them.

The deputy will be the person who receives all non-financial emails also.

The financial contact will receive any payment related emails.

If your CAB main contact is also the financial contact then add in the same email address, in the sample below training@hsa.ie and copy the other information. All three roles could be operated by one user which is all tracked by the email address. You will be warned if the email address already exists in the system.

Create Profile

Step 3 of 3 - Add Contacts

Add your main company contacts for your CAB below

Contact Type	First Name	Last Name	Phone Number	Email	Site Name
Main Contact*	<input type="text" value="Training"/>	<input type="text" value="User"/>	<input type="text" value="+353 1 624 1456"/>	<input type="text" value="training@hsa.ie"/>	H10 <input checked="" type="checkbox"/>
Deputy Contact*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Financial Contact*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

4. Application for New Standard

On the homepage click on the button “Apply to be accredited to a new accreditation standard” which will lead you through a wizard as per the sections below.

4.1. Step 1: Choose the standard and sub scopes

There are a number of steps to applying for a standard. The first step is to detail which standard and sub scopes.

The list of standards will display all currently available. If you are already accredited for a standard (eg ISO 15189) or already have applied then it will not appear in the standard dropdown.

At the beginning you have one option for a sub scope, click add another sub scope to get more options.

A Purchase Order number must be entered to proceed.

See also Appendix A for additional information.

The screenshot shows a web form titled "Apply for Accreditation" with the sub-header "Step 1 of 4 - Standards and Sub Scope". The form contains the following fields:

- Select a Standard***: A dropdown menu with "ISO 15189" selected.
- Select Sub-Scopes***: Three stacked dropdown menus with "Microbiology and Virology", "Haematology", and "Immunology" selected. To the right of these is a button labeled "Add Another Sub Scope +" with a plus sign icon.
- Purchase Order***: An empty text input field.

At the bottom right of the form is a green button labeled "Save and Proceed to Next Step" with a right-pointing arrow.

4.2. Step 2: Application specific questions

Step 2 of the application is broken into three segments. The top section has two optional questions:

Apply for Accreditation

Step 2 of 4 - Application Scope

Standard	ISO 15188
Sub-scope(s)	Microbiology and Virology, Haematology, Immunology
Is the organisation part of a larger organisation with activities/products/services other than those subject to the application for accreditation? If so, please identify organisation and activities (e.g. consultancy, training, market surveillance). If part of Government, please define relationship within Government.	
If an existing notified body, please provide notification number and product directive	

The key personnel changes depending on the standard being applied for. If there are a number of sub scopes then there could be a number of people doing this role. It is free text, see sample below:

Key Personnel

Laboratory Director*	Jerry McGuire (Haematology), Mary Byrne (Immunology)
Clinical Manager*	
Deputy Clinical Manager*	
Technical Manager*	
Deputy Technical Manager*	
Quality Manager*	
Deputy Quality Manager*	
Name and position of organisation's representative with authority to commit to accreditation*	

The last segment relates to the number of staff employed, if a non-numerical value is entered you will be informed it must be a number.

See also section 13 for additional information.

Number of Staff employed by the organisation

Clinical*

Technical*

Other*

Total Direct Employees*

4.3. Step 3: Upload scope

Step 3 of the wizard is to upload the scope of application. Each different sub scope is listed as a tab:

Apply for Accreditation

Step 3 of 4 - Scope of Accreditation

Biological and Veterinary Testing | Chemical Testing | Acoustic & Vibration Testing

Site	Biology/veterinary f	Category	Test name	Technique	Matrix	Equipment	Std. reference
------	----------------------	----------	-----------	-----------	--------	-----------	----------------

✕ Clear Table | Save

Download a blank scope template for this accreditation
Useful for adding multiple new scope elements to your accredited scope. If you wish to change existing scope elements, please use the form above. It is also possible to add new scope elements individually using the form above.

Upload new and modified scope elements to your accreditation

Save and Go Back | Save and Proceed to Next Step

There are two choices to uploading scope, via the inline form **and/or** by downloading the Excel file and then uploading it.

Inline form entry:

1. You must enter in a site, and the next three columns. You can make the columns wider. To get a carriage return within a cell press Alt and Enter. Copied text may be pasted into multiple cells.

As you enter in data you must press save.

Microbiology and Virology | Haematology | Immunology

The scope elements for the sub-scope were successfully submitted.

Site	Medical Pathology Field - Test	Category	Test/Assay	Matrix	Equipment/Tech	Range of measun	Std. Ref & SOP	Flexible Scope (w
HQ	1011 Macroscopic examination and description	A	Test A					
HQ	1011 Macroscopic examination and description	A	Test B					

✕ Clear Table | Save

Save and Go Back | Save and Proceed to Next Step

Click on the clear table if you want to remove the scopes added so far. You can then add more scopes in by following the next section:

Download Excel and upload function:

Download the Excel template to your computer. When completing the scope some things to remember:

2. To get a carriage return within a cell press Alt and Enter

- To use the symbol and superscript click on Insert tab and the Symbol icon:



- You can have empty lines in the Excel however if you enter in a site then you must complete the next three columns.
- For the second column you cannot drag and drop the field, see example below, 710 was dragged which Excel made to be 711, 712 713 etc which will not load into the system:

Site	Materials testing - Tests	Category
Head Office	710 Materials testing - .03 Chemical analysis	A
Head Office	711 Materials testing - .03 Chemical analysis	A
Head Office	712 Materials testing - .03 Chemical analysis	A
Head Office	713 Materials testing - .03 Chemical analysis	A

When you are finished, click on Upload functionality (on same page) and select the file you have been editing. If you choose a different file an error will display. If there are any errors in the Excel e.g. the site name is not filled in you will get an error message. Correct the errors and upload the file. Press Save. If you have more sub scopes then select another tab and repeat the process.

If you have notes then ensure you enter in the symbol to refer to the note in the first four free text columns. Email in the notes to your INAB Officer who will add them to your scope document.

If you need to add a new site for scopes then read section 8.3. When you reload the page the site will be available to choose from, for Excel you must download a new version to be able to use the new site.

See also section 13 for additional information.

Delete scope element on Application or at CAB revision stage



On step 3 of an Application a CAB can now delete a scope element (row) from the table by right clicking on any cell in the row and selecting Delete Scope Element.
If the Application is sent back to CAB (CAB revision) they can delete scope elements also.



Apply for Accreditation

Step 3 of 4 - Scope of Accreditation

Reference Materials Producers

Site	Reference Material	Characterisation tec	Property value	Characterisation rar	Uncertainty	Certified/non-certif	Std. Ref & SOP
Field Office	1401 Metal RM - Brasses	Testing 1	testing 2	testing 3	testing 4	testing 5	testing
Field Office	1401 Metal RM -	Testing 2.1	Testing 2.2	Testing 3.3	Testing 4.4	testing 5.5	testing 6.6

  Download a blank scope template for this accreditation
Useful for adding new scopes to your accreditation. All scopes will be uploaded as new requests; if you wish to change scopes then use the form above.

  Upload new and modified scopes to your accreditation

4.4. Step 4: Application declaration

Read the Terms and Conditions:

Apply for Accreditation

Step 4 of 4 - Application Declaration

STATEMENT AS DEFINED BY INAB: AGREEMENT BY APPLICANT TO INAB'S TERMS AND CONDITIONS AND INAB REGULATIONS

The Organisation identified below hereby applies to INAB to assess the Organisation for its eligibility to be accredited as competent to provide the services specified in this application, having regard to relevant accreditation criteria and any other conditions or factors that INAB considers to be relevant to or to affect the Organisation's competence for the specified services.

The Organisation acknowledges that it has read the INAB Terms and Conditions and the INAB Regulations and agrees to comply at all times, during the currency of the application made herein and any resulting accreditation, with the INAB Terms and Conditions and INAB Regulations as the same may be substituted, amended, supplemented or varied by INAB after the date of this application.


In particular the Organisation notes the obligations as to insurance specified in clause 16 of the INAB Terms and Conditions and confirms that such insurances are either already in place or will be in place prior to the grant by INAB of any accreditation that may result from this application.

Where an application for accreditation is being made by a government department or a body acting under the auspices of a government department where that body has no separate legal identity from that of the department, INAB does not require the relevant Minister to comply with the obligations as to insurance set out in clause 16 of the INAB Terms and Conditions. This is in recognition of the fact that government departments do not take out insurance to cover liabilities that may arise in their contractual arrangement. This exemption does not however affect the obligation of the relevant Minister to indemnify INAB in accordance with clauses 9 and 15 of the INAB Terms and Conditions.

Further, the Organisation notes the fees set out in the fee schedule and payable in respect of the following: the assessment now applied for; assessment and inspection services; any resulting accreditation; renewal fees, surveillance fees and any other fees necessary to maintain, supervise or review any accreditation that may be obtained by the Organisation, including expenses of outside auditors etc., as any and all such fees may be substituted, amended, supplemented or varied by INAB after the date of this application and the Organisation agrees to pay such fees in accordance with the requirements set out in the INAB Terms and Conditions.

The Organisation hereby confirms that it has a right to supply the data and information contained in this application or which it otherwise gives to INAB, and gives its own consent and confirms that it has obtained all properly informed consents from any individuals in respect of whom the Organisation is giving data or information to INAB to enable INAB to lawfully receive such data and information and make use thereof for the purposes of its functions (having particular regard to, but not limited to, applicable data protection legislation) and also confirms that all such data and information is complete, accurate and correct and that it will promptly provide any such further information and data as may be required by INAB to assess and process this application.

Instructions:

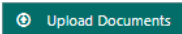
- 1) Please print off the above document using the button here: 
- 2) Ensure a person with appropriate authority signs the document. Then scan it and upload it using the 'Upload Documents' feature below
- 3) Please download the AF108 form from the library, complete in full and submit with your application.
- 4) Upload documents using below link

Press Print to print out the instructions which need to be signed and scanned. There is a document with additional questions to download and complete.

On the lower section of the form:

The following documents need to be uploaded

Document Type	Uploads
Quality Manual (see INAB PS10)*	<input type="checkbox"/>
Signed Statement*	<input type="checkbox"/>
Completed AF108 form*	<input type="checkbox"/>
Upload Documents	<div style="text-align: center;">Browse to add documents <input type="button" value="Choose Files"/> No file chosen</div>



Click on the browse and select all three documents required. Tick to confirm that each have been uploaded.

The AF108 form is available from the INAB Portal Library.

Upload your Quality Manual (or equivalent – see INAB PS10 document).

Upload supporting evidence for your application (see INAB PS10 document).

When the documents are selected press the Upload Documents button. Then click on submit.

If all documents are not submitted you will be informed at this point.

If the application is successful you will receive the following message:

Apply for Accreditation

Application Submitted

Please note that INAB is experiencing an increase in NEW applicants –
It can take up to 15 working days before your application will be reviewed and assigned to an Assessment Manager.
You can expect to have contact from your Assessment Manager within 30 working days.

[Go Home](#)

5. Apply for a Scope Extension

You can only apply for a scope extension after your initial application has been approved.

See also Appendix A for additional information.

402MT for ISO 15189

The screenshot displays a user interface for managing a scope extension. It is divided into several sections:

- 402MT for ISO 15189:** A table with the following details:

Awarded:	01/09/2016
Renewed:	
Expires:	01/09/2021
Standard:	ISO 15189
Sub Scope(s):	Microbiology and Virology Haematology Immunology
Status:	Approved
- Events:** A section with a 'Show:' dropdown menu set to 'All Events' and the text 'No records found.'
- History:** A section with two columns of links:

Application History:	Link To App History	Change Request History:	Link to Change Request History
-----------------------------	-------------------------------------	--------------------------------	--
- Extensions to Scope:** A section with the text 'No records found.' and a prominent green button labeled 'Apply to amend or extend scope'.


Click on 'Apply to amend or extend scope' to start the process.

5.1. Step 1: Standard and sub-scope

Add a description for scope extension. There can be a number of applications in progress at any one time so this description should accurately describe the changes:

Apply for Scope Extension

Step 1 of 4 - Standards and Sub-Scope

Scope Extension Description* 

Select a Standard*

Select Sub-Scope(s)*

If you wish to extend your existing scope rather than add a new sub-scope, click 'Save and Proceed to Next Step'.
Note: It is possible to apply for extensions to scope in multiple sub-scope disciplines as part of a single application.

If another sub scope is required then click on “Add Another Sub Scope”. If not then click on save and proceed.

5.2. Step 2: Application specific questions

The section is the same as section 4.2 however the first sections will be pre filled with answers from the last concluded application. The last section is specific to the scope extension:

Application Details

I would like INAB to assess my application:*	<input type="text"/>
Is there an impact on INAB cross frontier policies?*	<input type="text"/>
Is there an impact on INAB multi-site policies?*	<input type="text"/>
Is there an impact on the impartiality of the organisation or the services it offers?*	<input type="text"/>

The first question is to highlight to INAB how you would prefer your application to be assessed.

If 'Yes' is chosen for any of the final three questions, additional information will be requested.

Application Details

I would like INAB to assess my application:*	At the next surveillance visit
I understand that I will incur additional costs for this choice:*	Yes
Is there an impact on INAB cross frontier policies?*	Yes
Please explain the impact that this will have*	<input type="text"/>
Is there an impact on INAB multi-site policies?*	Yes
Please explain the impact that this will have*	<input type="text"/>
Is there an impact on the impartiality of the organisation or the services it offers?*	Yes
Please explain the impact that this will have*	<input type="text"/>

5.3. Step 3: Update scope

Any existing sub scope can have tests amended or added to via the inline form detailed in section 4.3. Remember to click on save on each tab as you make changes.

If you would prefer that extensions to scope for multiple subscores are assessed at a single assessment visit, then each sub-scope extensions must be included in a single application.

You may switch between subscores using the tabs.

Status	Site	Medical pathol	Category	Test/assay	Specimen Type	Equipment/Tec	Flexible scope	Range of meas	Std. ref & SOP
Accredited	HQ	1011 Macroscopic examination and description	A	1					
Accredited edited	HQ	1011 Macroscopic examination and description	A	1	2	3	4		

You will notice when you amend scope elements a new row is added with a status of 'Accredited Edited' as until the scope extension is approved your initial scope element is the one accredited.

To add new scopes you can download an Excel template and upload it as per section 4.3. There is no automatic check to look for existing rows so ensure you are adding new items. You can use the upload file numerous times.

If you need to amend the notes email your INAB Officer and these will be applied when the scope extension application is complete.

If you need to add a new site for scopes follow the instructions in section 8.3.

When the application is reloaded the new site will be available to select.

If applying for an extension using Excel template, then you must download a new version to be able to use the new site.

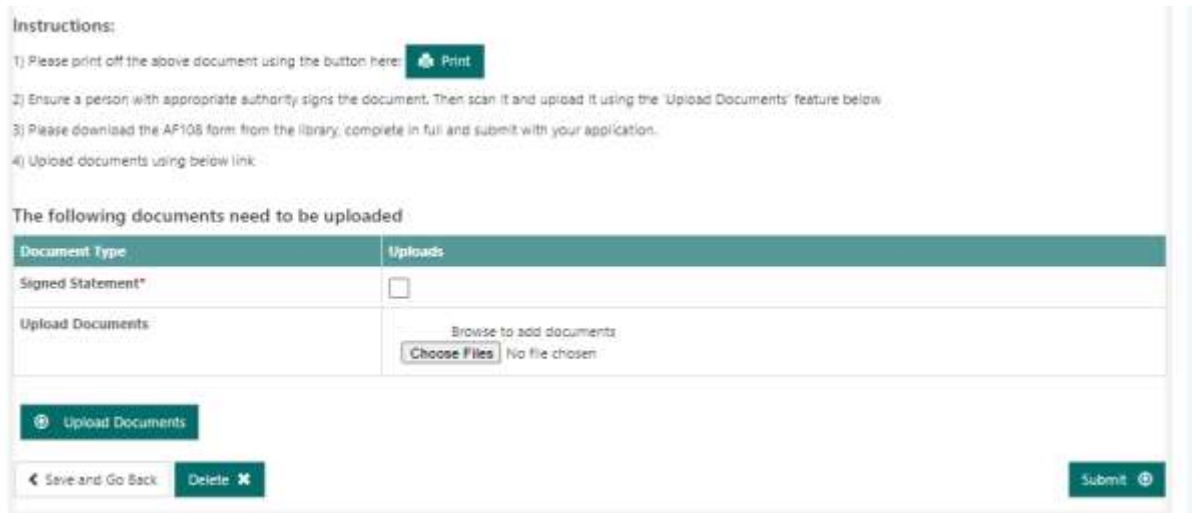
See also Appendix A in section 13 for additional information.

5.4. Step 4: Application declaration

The terms and conditions statement must be printed, signed and scanned and then uploaded at the end of the form.

The AF108 form must also be completed and uploaded (available from INAB Portal Library).

Upload supporting evidence for your application (see INAB PS10 document).



Instructions:

- 1) Please print off the above document using the button here: [Print](#)
- 2) Ensure a person with appropriate authority signs the document. Then scan it and upload it using the 'Upload Documents' feature below.
- 3) Please download the AF108 form from the library, complete in full and submit with your application.
- 4) Upload documents using below link:

The following documents need to be uploaded

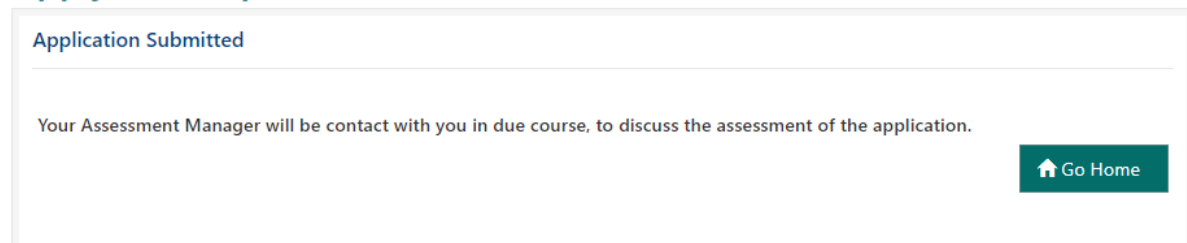
Document Type	Uploads
Signed Statement*	<input type="checkbox"/>
Upload Documents	Browse to add documents Choose Files No file chosen

[Upload Documents](#)

[Save and Go Back](#) [Delete](#) [Submit](#)

After the document is uploaded then click on submit. If upload is successful this will be returned:

Apply for Scope Extension



Application Submitted

Your Assessment Manager will be contact with you in due course, to discuss the assessment of the application.

[Go Home](#)

On the accreditation page you will now see the submitted application:



Extensions to Scope

1 record(s) found. Showing 1 - 1

Description:	Status
Adding a new test for Haematology	Submitted

 [Apply to amend or extend scope](#)

5.5. To apply for or modify a flexible scope

CABs can create a new extension to scope application (see section 5, apply for extension to scope). Modify their existing scope and edit the “Test Name” field of the relevant scope element to include the required footnotes described in PS11.

The layout suggested when applying for a flexible scope element is: input two spaces, two asterisks followed by the relevant number, i.e. “ Albumin **1,2,3,4”.

N.B. How to apply / amend a flexible scope in CRM - consult Factsheet - CRM FS-20 How to apply a flexible scope in CRM. This factsheet is available in the CRM portal library.

See also Appendix A in section 13 for additional information.

6.Events

When events are organised the primary and deputy contacts will receive emails from the system which will direct the user to the portal. When you log into the portal the events will be shown both on the homepage. If there is more than one accreditation all are shown on the homepage. Clicking into the accreditation will show only the events for that standard.

Click on the event to see more details on the event. At each stage different information will be available. Here are the following event statuses:

Status	Explanation	Visible to Assessors	Visible to CAB
Team Confirmed	You can view the assessment team and acknowledge them. You can upload documents for the assessors.	✓	✓
Plan Confirmed	In addition to the team being displayed the event logistics and which scope elements are assigned to assessors are also shown.	✓	✓
Addressing NC's	Each assessor has uploaded their NCs and you will be able to work through batches of NCs and submit corrective actions.	✓	✓
Ready for Decision	The event is ready to form part of a decision to the board.	✓	✓
Closed	Decision has been made. All information is read only.	✓	✓

Events from the Homepage:

The screenshot shows the 'Events' section of the portal. It includes a 'Show:' dropdown menu currently set to 'All Events'. Below this, it states '1 record(s) found. Showing 1 - 1'. A table displays the following data:

Reg Num	Date	Type	Status	Non Conformities
402MT	01/03/2017	First Surveillance	Team Confirmed	

Click on the link in blue to open. You can change the filter

6.1. Acknowledge the team

When an event is being prepared the primary and deputy contacts will get an email asking them to login to the portal to view the event.

At this stage you will be able to see the assessment team, the discipline being assessed, their role, and the organisation(s) to which they belong:

The screenshot displays the 'Assessment - 6 months - 402MT for ISO 15189' page. It features a summary table with the following data:

CAB Name:	Training CAB	Site Name:	HQ
Event Type:	First Surveillance	End Date:	01/03/2017
Start Date:	01/03/2017	Visits to this CAB:	0
Status:	Teams Confirmed	Non Conformities recorded against this CAB:	0
Standard:	ISO 15189		
Sub Scopes:	Microbiology and Virology Haematology Immunology		
INAB Officer:	Stephen Moylan		

Below the table are navigation tabs: Overview, Visit Plan, Logistics, Actual Visit, Non Conformities, and Documents. A message box contains the text: 'Click to acknowledge the team for this visit' and 'If you have an objection to any member of the team please contact your INAB officer'. The 'Assessor Team' section shows 1 record found, displaying a table with the following data:

Name	Organisation(s) the assessor belongs to	Discipline/sub-scope area	Agreed Days	Role	Attendance	NC Status
Pdraig Keane	Irish National Accreditation Board	Quality Management System	1.5	Lead Assessor		

Click on the button “Click to acknowledge the team for this visit” or alternatively contact your Assessment Manager if you wish to discuss a change in the team.

6.2. Upload document to the event

When you have the event team you can upload documents either for individual assessors or for the entire team to view. Browse for the document you want to upload and mark it for the Assessor or for the whole team, then click the upload document button. If there are a large number of documents it is best to upload a zip file.

NB – if you're uploading PS10 documents and these are to be viewed by the full team, you will need to choose for the attention of: ALL in the drop down menu. See screenshot below

The screenshot displays the 'Uploaded Documents' page. At the top, there are navigation tabs: Overview, Visit Plan, Logistics, Actual Visit, Non-Conformities, and Documents (which is active). The main content area is titled 'Uploaded Documents'. It features an 'Upload Documents:' section with a file input field, a 'Browse...' button, and a green 'Upload Document' button. Below this is a 'For the attention of:' dropdown menu with 'All Training Assessor' selected. Two sections below, 'All Documents For The Event' and 'Documents for Training Assessor', both show 'No records found.'

The documents uploaded will be listed below.

If documents are relevant to single assessor or to INAB officer only, then they may be uploaded to the individual. Please ensure that documentation for the team to view is uploaded to ALL.

NB - Please ensure that your file names do not include special characters (i.e &/-\#+@;!\"£?.,) as this causes errors, and users will experience difficulty downloading / uploading.

Also ensure that your file name does not exceed 250 characters, as it will also cause errors.

Assessors will also upload documents to this area after the assessment (including the x116 assessment reports). If this area has no documents listed it could be because a document is in review in INAB. It will be made visible to you when approved by INAB.

6.3. View, sort and print the visit plan

When the event is at Plan Confirmed more information on tabs is available:

VISIT PLAN

The visit plan lists the proposed scope elements that will be reviewed at your visit.

- The assessor will assign the scope elements for assessment/witnessing

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

Show Sub Scopes: All SubScopes

Show assessor: All

317 records found. Showing 1 - 350

Assessor	Sub Scope	Scope Item	Category	Scope Element	Last Valided	Scope Site	Scope Status
Alison Branfield	Microbiology and Virology	1017 Measurement of antimicrobial activity and application of clinical interpretive criteria to general bacteria (rapidly growing aerobic) - 01 Asserobac	A	Antimicrobial Sensitivity Testing: Antibes and Anaerobes	01/08/2018	Head Office	Accredited
Alison Branfield	Microbiology and Virology	1018 Identification of cultured bacteria and fungi using non nucleic acid based techniques - 01 Biochemical methods, CE marked commercial systems	A	Biochemical Methods, CE marked commercial systems	01/08/2018	Head Office	Suspended
Alison Branfield	Microbiology and Virology	1014 Detection of bacterial, parasite, viral or fungal antigens using specific antibodies and appropriate techniques - 04 Immunochromatographic methods	A	Immunochromatography: methods, Urinary antigens	01/08/2018	Head Office	Accredited
Alison Branfield	Microbiology and Virology	1014 Detection of bacterial, parasite, viral or fungal antigens using specific antibodies and appropriate techniques - 04 Immunochromatographic methods	A	Immunochromatography: methods, Urinary antigens	01/08/2018	Head Office	Accredited

Click on to see more details on the scope elements like last, etc.

Users have the ability to:

1. Sort by all headings - Click on the arrow beside the heading name to sort by that field.
2. Expand and Collapse all button - Click on the arrow, as highlighted in the red box, to see further details on the scope.
3. Print a pdf copy of visit plan (as per screen ie Assessor/sorted in a particular way)
The print button, is situated on the right hand side, above the "Show Subscopes/Assessor" filter.
 - a) 1st page will capture Event details
 1. Cab name – CAB Name
 2. Event type – Event Type
 3. Start date – Start Date
 4. End date – End Date
 5. Site name – Site Name
 6. Standard - Standard
 7. Sub scopes – Sub Scopes
 8. Team members and role
 9. INAB Officer
 10. Logistics
 - b) Subsequent pages will display all Scope items expanded

On the **Logistics tab** information related to the event will be displayed:

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

The team will be onsite at 9am and will call the quality manager. Lunch will be at 1pm. There will be a wrap up meeting at 3pm to go through the results and plan for the follow up.

6.4. View the actual visit

After the visit the assessor will update the visit plan with what was actually witnessed or not. In the example below two scope elements were witnessed as planned, and a third was related to a test witnessed.

Assessor	Flag	Sub Scope	Scope Item	Category	Scope Element	Last Visited	Scope Site	Scope Status
Alison Bransfield	Related to test Witnessed	Histopathology and Cytopathology	1051 Histopathology - .09 Immunohistochemistry	A	NYAP	20/09/2018	Head Office	New
Alison Bransfield	Witnessed	Histopathology and Cytopathology	1051 Histopathology - .09 Immunohistochemistry	A	RUBIQ (EQA Cork)	01/08/2018	Head Office	New
Alison Bransfield	Witnessed	Histopathology and Cytopathology	1051 Histopathology - .09 Immunohistochemistry	A	NTSH	01/08/2018	Head Office	New

HOW TO SORT THE LIST?

In the screen shot below, the list is sorted by SUB SCOPE. To do this, click the arrow as highlighted in the red box. You can click on any of the main headings (including Assessor) and sort the list as required.

Assessor	Flag	Sub Scope	Scope Item	Category	Scope Element	Last Visited	Scope Site	Scope Status
Alison Bransfield	Witnessed	Microbiology and Virology	1017 Measurement of antimicrobial activity and application of clinical interpretive criteria to general bacteria (rapidly growing aerobes) - .01 Anaerobes	A	Antimicrobial Sensitivity Testing: Aerobes and Anaerobes	01/08/2018	Head Office	Accredited
Alison Bransfield	Witnessed	Microbiology and Virology	1016 Identification of cultured bacteria and fungi using conventional methods	A	Biochemical Methods: CE	01/08/2018	Head Office	Suspended

HOW TO EXPAND THE SCOPE ELEMENT TO SEE ALL DETAIL?

Click on the arrow indicated in the blue box, this will expand and show further details (test, SOP etc.)



Click on the arrow indicated in the expand the details on the scope.

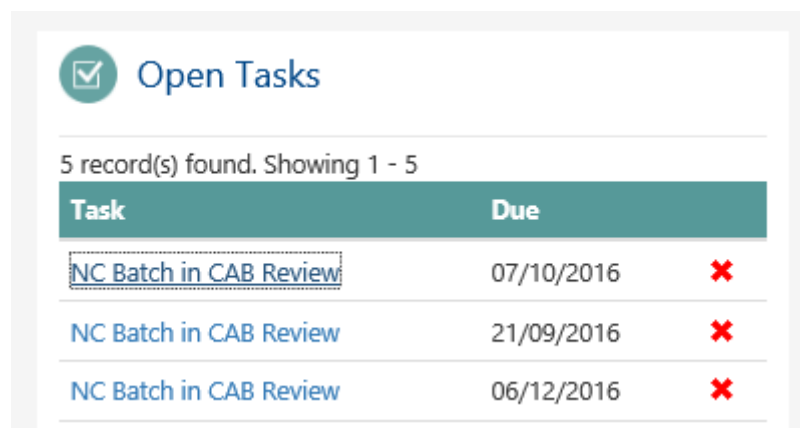
Assessor	Flag	Sub Scope	Scope Item	Category	Scope Element	Last Visited	Scope Site	Scope Status
Wilson Branfield	Witnessed	Microbiology and Virology	1017 Measurement of antimicrobial activity and application of clinical interpretive criteria to general bacteria (rapidly growing aerobes) - 01 Anaerobes	A	Antimicrobial Sensitivity Testing: Aerobes and Anaerobes	01/08/2018	Head Office	Accredited

6.5. View non-conformities and respond

When the first assessor uploads their non-conformities the event status will change to Addressing NCs. The NCs uploaded are divided into batches with each batch having a different deadline. Therefore for each assessor there could be three batch types, i.e. two assessors with all three types of NCs will mean there are 6 batches to be responded to.

1. Major
2. Minor
3. Extension to scope

Major NC's have the shortest deadline so these should be responded to first. You will receive a task per batch submitted:

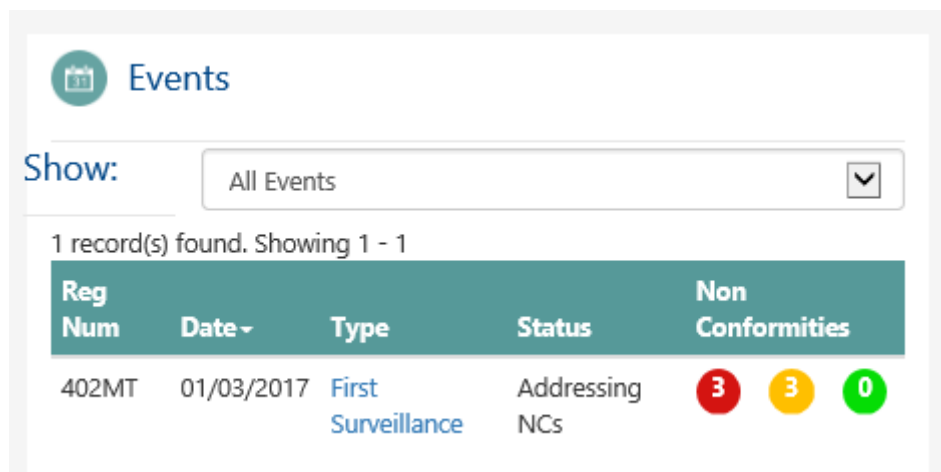


Open Tasks

5 record(s) found. Showing 1 - 5

Task	Due	
NC Batch in CAB Review	07/10/2016	✘
NC Batch in CAB Review	21/09/2016	✘
NC Batch in CAB Review	06/12/2016	✘

On the events panel the number of NCs will be shown:



Events

Show: All Events

1 record(s) found. Showing 1 - 1

Reg Num	Date	Type	Status	Non Conformities
402MT	01/03/2017	First Surveillance	Addressing NCs	3 3 0

Click into the event and onto the Non Conformities tab:

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	No	Training CAB	21/09/2016	13
View Batch	Training Assessor	Minor	No	Not Cleared	2	1	No	Training CAB	07/10/2016	29
View Batch	Training Assessor	Minor	Yes	Not Cleared	1	1	No	Training CAB	06/12/2016	89

Each batch is listed with what it is classified as, who it is assigned to along with the due date and the number of days left to respond. The number of NCs in the batch and what clearance attempt it is at is shown. To view the NCs click on view batch:

Assessment - 6 months - 402MT for ISO 15189

Event Type	First Surveillance	Standard	ISO 15189
Start Date	01/03/2017	Sub Scopes	Microbiology and Virology Haematology Immunology
End Date	01/03/2017	All NCs:	3 3 0
Status	Addressing NCs		

Non Conformities in this Batch

Assessor	Training Assessor	Assigned To	Training CAB
Classification	Major	Due By	21/09/2016
Extension to Scope	No	Days	13

3 record(s) found. Showing 1 - 3

Filter by Status:

Observation number	Standard Ref.	Status	Clearance Attempt	Last Updated
1A/1/2016	Ref 123	Not Cleared	1	07/09/2016
1A/2/2016	Ref 124	Not Cleared	1	07/09/2016
1A/2/2016	Ref 125	Not Cleared	1	07/09/2016

All NCs in a batch must be responded to before the batch can be submitted to INAB to review. Click on the observation number:

This is a test

Nonconformity Event Record	
Observation Number	1
Standard Reference	ABC
Status	In Review
INAB Observation	This is not good enough
Classification	Minor
Evidence of Corrective Action Required	No
Extension to Scope	No
Proposed Response	I will fix

Clearance Attempt Documents

Clearance History		Edit Details
Attempt Number	1	
CAB Response*	jjjjj	
<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>		

Previous NC Next NC

Return to Batch Submit to INAB

Click on Edit details to add the corrective action:

Clearance History		Edit Details
Attempt Number	1	
CAB Response*	jjjjj	
<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>		

Previous NC Next NC

Return to Batch Submit to INAB

Documentary evidence may also be uploaded also at this point. When uploaded you can view the document in the documents tab. Response should include analysis of extent and cause of the nonconformity and any documentary evidence requested by the assessor.

Click on save details and then you can click to Next or Previous NC. When you have responded to all NC's you may submit the batch to INAB.

Please ensure that your file names do not have special characters (&!/,.\#@') as this causes errors, and users will experience difficulty downloading / uploading.

Also ensure that your file name does not exceed 250 characters, as this will also cause errors.

The 'Submit to INAB' option will only become available when a text response has been entered for each non-conformity in a batch. It is very important to click on Submit to INAB as otherwise you may exceed the deadline to respond to a batch.

The assessor will review evidence submitted and then either clear the finding or return it to the CAB for a further attempt. The batch will be re-assigned to the CAB and given a new deadline for submission.

Assessor comments and request for additional information may be viewed for previous clearance attempts ('See Previous').



Each of the attempts will be listed with a list of documents:

Previous Clearance Attempts



As the deadline for batch responses approaches emails will be sent to you to remind you of the deadlines.

6.6 My NC batches

As there can be different batches for different events assigned to different groups, there is a page accessible from the top navigation ribbon titled My NC Batches which lists out all the batches assigned to your CAB and deadline for response.



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	15/11/2016	28

Click into the batch you want to respond to by clicking view batch. Follow the instructions from section 6.5.

7.Accreditations

7.1. View my accreditation

Clicking on the registration number on the homepage will open up this page:

402MT for ISO 15189

402MT for ISO 15189

402MT for ISO 15189

Awarded: 01/09/2016

Renewal:

Expires: 01/09/2021

Standard: ISO 15189

Sub Scope(s): Microbiology and Virology
Haematology
Immunology

Status: Approved

Events

Show: All Events

1 record(s) found. Showing 1 - 1

Date	Type	Status	Non Conformities
01/03/2017	First Surveillance	Plan Confirmed	

History

Application History: [Link To App History](#)

Change Request History: [Link to Change Request History](#)

Extensions to Scope

2 record(s) found. Showing 1 - 2

Description	Status
Adding a new test for Haematology	Concluded
Another test added	Draft

[Apply to amend or extend scope](#)

If your changes are not yet visible they may not have been approved yet by an INAB Officer. Minor Scope edits can be made by selecting the down arrow beside the scope elements below.

HQ

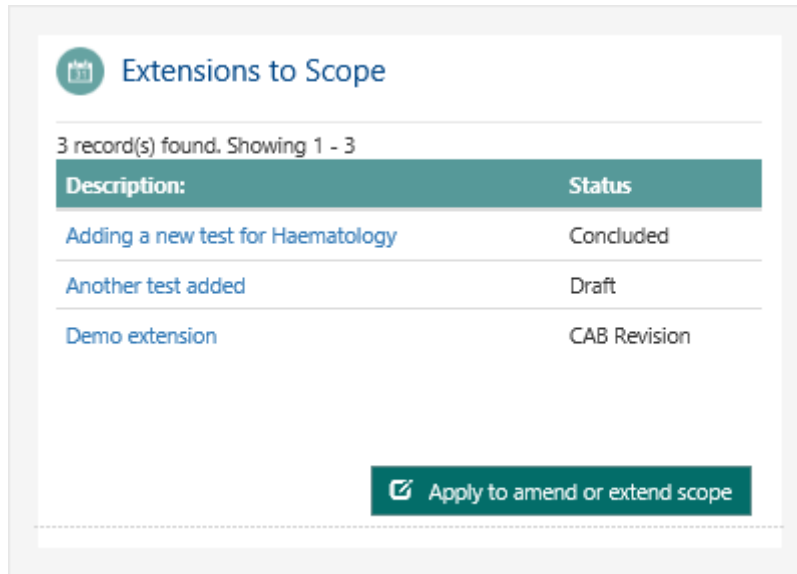
Sub Scope	Scope Item	Category	Scope Element
<input type="checkbox"/> Microbiology and Virology	1011 Macroscopic examination and description -	A	1
<input type="checkbox"/> Haematology	1030 Haematology - .01 Blood counts	A	2
<input type="checkbox"/> Immunology	1040 Immunology - .01 Quantitative Investigation of Immunoglobulins G, A, M and D in body fluids	A	3

[Withdraw](#) [Suspend](#)

General information related to the accreditation is displayed at top left. Below this are links to the application history, see section 7.2, and change request history (suspensions and withdrawals), see section 7.6.

All events for this specific accreditation will be shown. Current or closed events may be viewed by using appropriate filter.

Any extension to scopes section there are a number of statuses:



The screenshot shows a web interface titled "Extensions to Scope" with a calendar icon. Below the title, it states "3 record(s) found. Showing 1 - 3". A table with two columns, "Description:" and "Status", lists three records. At the bottom right of the table area is a green button with a pencil icon and the text "Apply to amend or extend scope".

Description:	Status
Adding a new test for Haematology	Concluded
Another test added	Draft
Demo extension	CAB Revision

A status of concluded means the application has been closed.

If it is in draft then the application is still in progress and has not been submitted as yet. If it is at Submitted/Received then INAB are reviewing the application and no changes can be made.

If further information is required, INAB may return the application to the CAB. If INAB set the application to CAB Revision then the application can be modified by the application as per section 5.

A new extension can be made by clicking on apply to amend or extend scope.

All scopes are listed at the end with a tab per site. By clicking on the down arrow more information on the scope element is shown. From here a minor edit can be requested (section 7.3), or scope elements withdrawn (section 7.4), or suspended (section 7.5)7.5.

7.2. View application history

Click on the link to app history in blue from the accreditation page:

History

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

All applications will be displayed in a pop up:

Application History ×

4 record(s) found. Showing 1 - 4

Date Submitted	Application Type	Current Status	View Application
06/09/2016	New Application	Concluded	Training CAB - ISO 15189
07/09/2016	Scope Extension	Concluded	Adding a new test for Haematology
07/09/2016	Scope Extension	Draft	Another test added
07/09/2016	Scope Extension	CAB Revision	Demo extension

× Close

Any application can be clicked to see the information from the application:

Training CAB Application

Standards and Sub Scopes

Standard:	402MT for ISO 15189	Purchase order number:	123456
Sub Scopes:	Microbiology and Virology Haematology Immunology		

Key Personnel

Laboratory Director:	Lab Director		
Clinical Manager:	Clinical Man	Deputy Clinical Manager:	Dep Clinical Man
Technical Manager:	Tec Man	Deputy Technical Manager:	Dep Tec Man
Quality Manager:	Qual Man	Deputy Quality Manager:	Dep Qual Man
Name and position of the Organisations representative with authority to commit to accreditation:		Name an Post	

Staff employed by the organisation

Technically Qualified:	10	Clinical:	10
Other:	10		

HQ

Sub Scope	Scope Item	Category	Scope Element	
Microbiology and Virology	1011 Macroscopic examination and description -	A	1	▼
Haematology	1030 Haematology - .01 Blood counts	A	2	▼
Immunology	1040 Immunology - .01 Quantitative investigation of immunoglobulins G,A,M and D in body fluids	A	3	▼

All the documents associated with the application are shown also at the end.

7.3. Make a minor edit

If there is a spelling error required for each scope element you can request it to be changed. From the accreditation click on the down arrow:

If your changes are not visible they may not have been approved yet by your assessment manager. Minor scope edits can be made by selecting the down arrow beside the scope element and editing the text.

CERTIFICATION SITE Ennis General Hospital Head Office Raheen Site-Microbiology Nenagh Hospital

Show 250 entries Previous 1 2 Next

Showing 1 to 250 of 297 entries

Sub Scope	Scope Item	Category	Scope Element
<input type="checkbox"/> Haematology	1030 Haematology - .02 Visual examination of blood films	A	note that the status changes to edited.
Medical pathology field Test/Assay	1030 Haematology note that the status changes to edited.	Test Specimen Type	.02 Visual examination of blood films EDTA Whole Blood
Technique	Hematek Staining machine and manual microscopy TEST	Range of Measurement/Equipment	N/A
Method (CE/Non-CE/In house developed/based on standard method)		Std. Ref & SOP	LP-HAEM-009

[Edit](#)

You will see an Edit button. Clicking on edit opens a pop up and the text fields can be changed:

Edit Scope ×

Sub Scope	Scope Item	Category	Scope Element
Microbiology and Virology	1011 Macroscopic examination and description -	A <input type="button" value="v"/>	New Test
Test/assay	<input type="text" value="New Test"/>	Specimen Type	<input type="text" value="New type"/>
Equipment/Technique	<input type="text"/>	Flexible scope (where applicable)	<input type="text"/>
Range of measurement	<input type="text"/>	Std. ref & SOP	<input type="text"/>

When submitted a request will be sent to INAB to approve.

Until it is approved the existing scope is shown on the accreditation page.

If approved it will be updated and you will receive an email.

If it is rejected then the extension to scope process will need to be followed to have the changes assessed and/or implemented. You will receive an email from your Assessment Manager if this is the case.

7.4. Withdraw scope elements

If you decide to withdraw a scope element you can do so by selecting certain tests or all tests:

HQ

<input type="checkbox"/>	Sub Scope	Scope Item	Category	Scope Element	
<input checked="" type="checkbox"/>	Microbiology and Virology	1011 Macroscopic examination and description -	A	1	▼
<input checked="" type="checkbox"/>	Haematology	1030 Haematology - .01 Blood counts	A	2	▼
<input type="checkbox"/>	Immunology	1040 Immunology - .01 Quantitative investigation of immunoglobulins G,A,M and D in body fluids	A	3	▼
<input type="checkbox"/>	Microbiology and Virology	1011 Macroscopic examination and description -	A	1	▼
<input type="checkbox"/>	Haematology	1030 Haematology - .01 Blood counts	A	2	▼
<input type="checkbox"/>	Immunology	1040 Immunology - .01 Quantitative investigation of immunoglobulins G,A,M and D in body fluids	A	3	▼

Withdraw Suspend

All scope
Selected scope reserved

When you select either all or selected scope a pop up opens:

You have chosen to withdraw the following: ×

- 1011 Macroscopic examination and description -
- 1030 Haematology - .01 Blood counts

Reason For Withdrawal:

Enter the reason for withdrawal and click on submit. The request will be submitted to INAB. It will be reviewed and when approved your scope of accreditation will be updated and this test(s) will be removed. Scope elements cannot be reinstated following withdrawal. If this test is required in the future a scope extension is required. These tests are grouped together in one request to INAB.

7.5. Suspend scope elements

Similar to the withdrawal section above, scopes or individual scope elements may also be suspended. The difference is a suspended scope can be reinstated (e.g. if a machine is out of use for a short period during planned maintenance).

Either select the specific tests or to suspend all scope (e.g. if the whole plant is being closed for a short time or is moving):

HQ

<input type="checkbox"/> Sub Scope	Scope Item	Category	Scope Element	
<input checked="" type="checkbox"/> Microbiology and Virology	1011 Macroscopic examination and description -	A	1	▼
<input checked="" type="checkbox"/> Haematology	1030 Haematology - .01 Blood counts	A	2	▼
<input type="checkbox"/> Immunology	1040 Immunology - .01 Quantitative investigation of immunoglobulins G,A,M and D in body fluids	A	3	▼
<input type="checkbox"/> Microbiology and Virology	1011 Macroscopic examination and description -	A	1	▼
<input type="checkbox"/> Haematology	1030 Haematology - .01 Blood counts	A	2	▼
<input type="checkbox"/> Immunology	1040 Immunology - .01 Quantitative investigation of immunoglobulins G,A,M and D in body fluids	A	3	▼

Withdraw Suspend

All Scope
Selected scope

NAB 2016. All rights reserved

Again a description is needed with a request date for the suspension:

You have chosen to suspend the following: ×

- 1011 Macroscopic examination and description -
- 1030 Haematology - .01 Blood counts

Reason For Suspension:

Start Date:

07-09-2016

× Cancel

↓ Submit

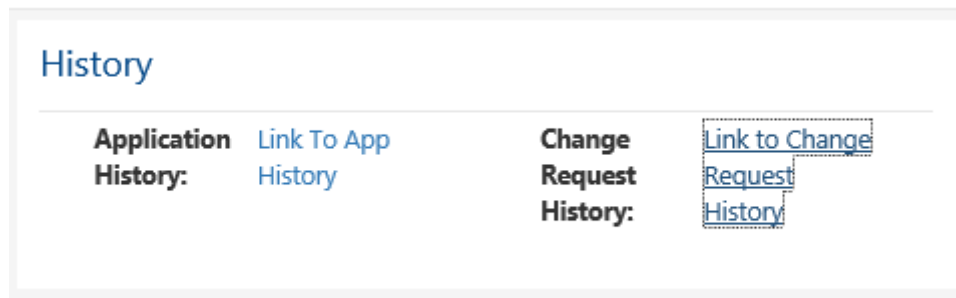
When submitted and approved by INAB this scope element will not be displayed on your scope of accreditation.

INAB will contact you to request an update on status of suspended scope elements. Alternatively the CAB should send a request for change to prompt the reinstatement when the problem has been resolved (see section 12).

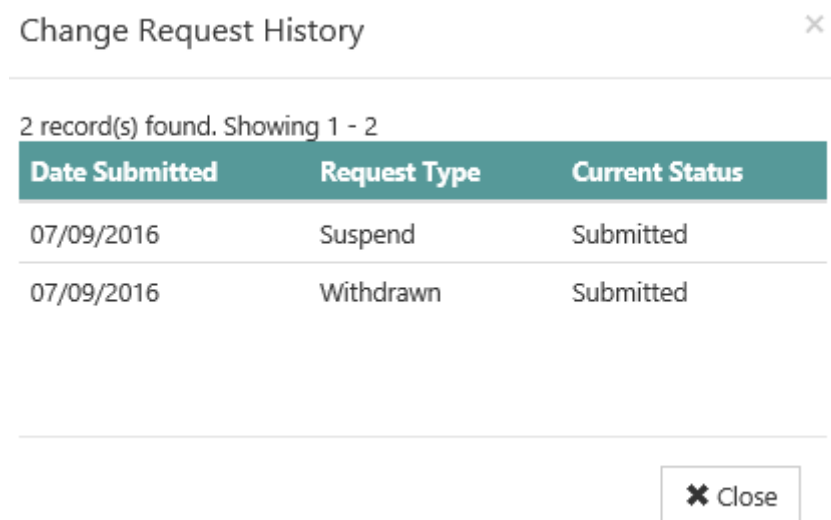
Note: the test(s) will be approved as a group (not individually) so make sure to group them appropriately.

7.6. View change request history

You can see the suspension and withdrawal history by clicking on the change request history link:



This opens a pop up:



Change Request History ×

2 record(s) found. Showing 1 - 2

Date Submitted	Request Type	Current Status
07/09/2016	Suspend	Submitted
07/09/2016	Withdrawn	Submitted

× Close

Change request statuses as follows;

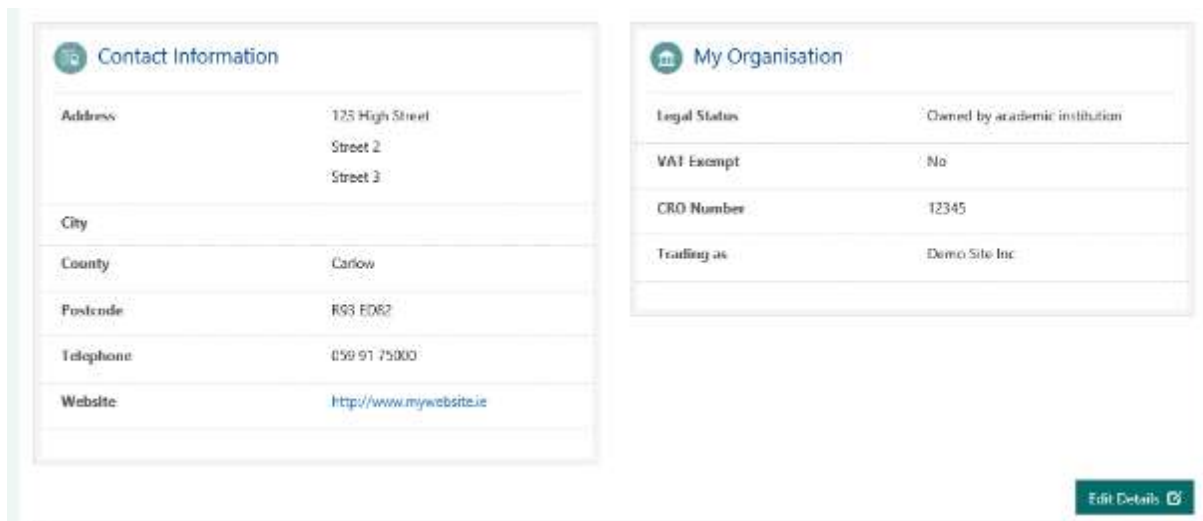
- Submitted (you have just made the request);
- Approved (INAB have approved this request but have not updated the scopes on the INAB website as yet)
- Rejected (the request has been rejected)
- Completed (all actions from the request are complete).

8. Update Organisation Information

There are a few sections which can be updated in this section, see below.

8.1. Profile information

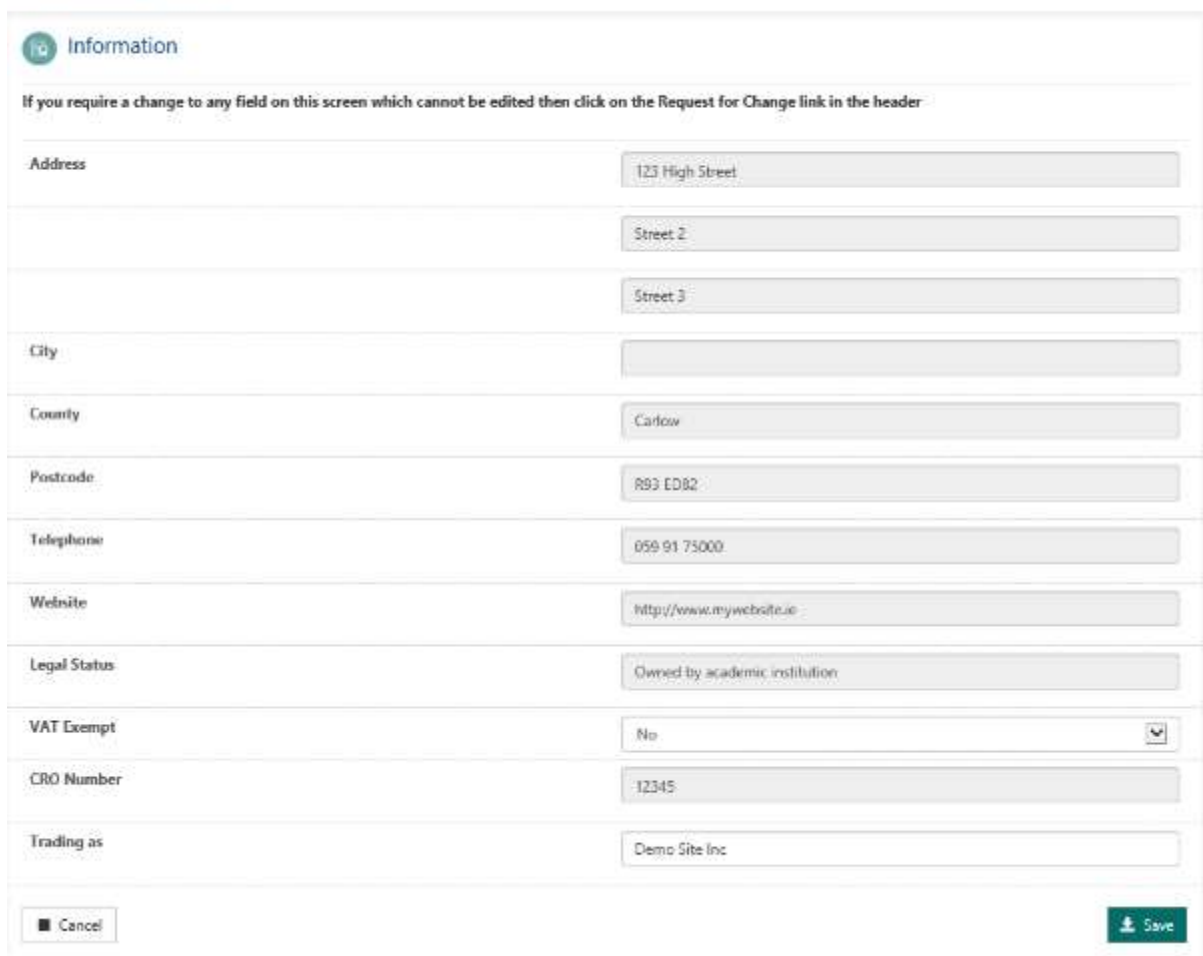
The first part of this page deals with the CAB information:



The screenshot shows two side-by-side panels. The left panel, titled 'Contact Information', contains the following fields: Address (125 High Street, Street 2, Street 3), City, County (Carlow), Postcode (R93 ED82), Telephone (059 91 75000), and Website (http://www.mywebsite.ie). The right panel, titled 'My Organisation', contains: Legal Status (Owned by academic institution), VAT Exempt (No), CRO Number (12345), and Trading as (Demo Site Inc). An 'Edit Details' button with a pencil icon is located at the bottom right of the panels.

Click on edit details:

Training CAB



The screenshot shows the 'Information' section of the 'Training CAB' form. It includes a header with a pencil icon and the text: 'If you require a change to any field on this screen which cannot be edited then click on the Request for Change link in the header'. Below this are several input fields: Address (125 High Street, Street 2, Street 3), City, County (Carlow), Postcode (R93 ED82), Telephone (059 91 75000), Website (http://www.mywebsite.ie), Legal Status (Owned by academic institution), VAT Exempt (No), CRO Number (12345), and Trading as (Demo Site Inc). At the bottom left is a 'Cancel' button, and at the bottom right is a 'Save' button with a download icon.

The only fields that can be changed are the VAT exempt and the Trading as. All other fields need to go through the request for change process, see section 12.


8.2. CAB key contacts

The three key contacts can be viewed in the middle section of My Organisation:

3 record(s) found. Showing 1 - 3

Name	Type	Site
Training User	Main Contact	HQ
Deputy Training User	Deputy Contact	HQ
Financial Training User	Financial Contact	HQ


To view more details click on the name:


 Contact Information

Name*	Training User
Telephone	+353 1 624 1458
Email	training@hss.ie
Site Name (if your organisation has multiple accredited sites)	HQ

[← Back](#) [Edit](#)

If you would like to change the phone number and the site click on edit:

 Contact Information

Name	<input type="text" value="Training User"/>
Telephone	<input type="text" value="+353 1 624 1458"/>
E-mail*	<input type="text" value="training@hss.ie"/>
Site Name*	<input type="text" value="HQ"/> 

To change the name and email you need to go through the request for change process, see section 12.

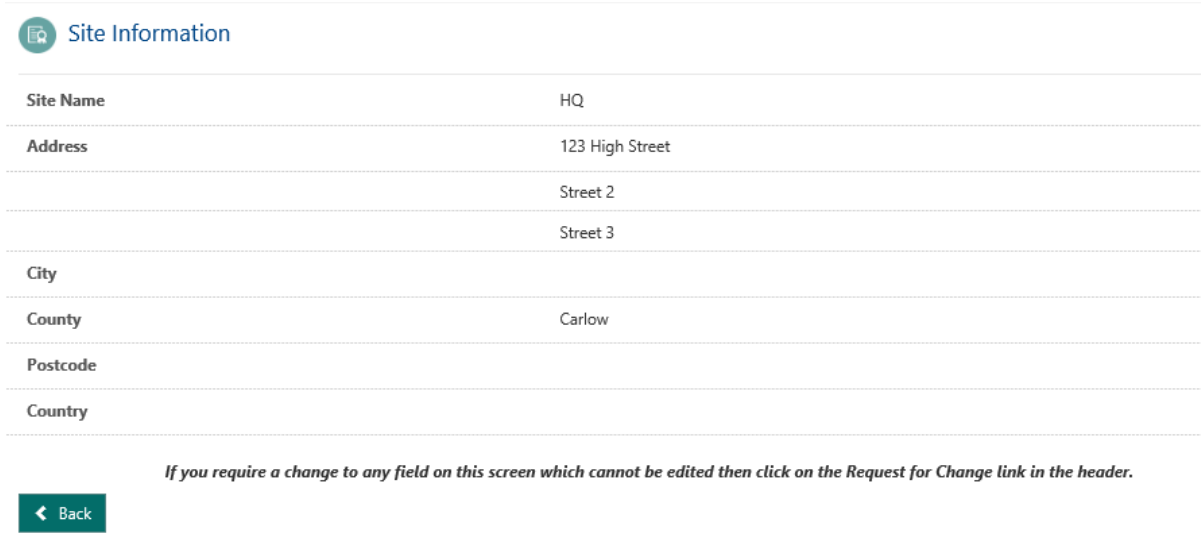
8.3. Sites

The final section is to view and add sites:



The screenshot shows a web interface for managing sites. At the top left is a location pin icon and the word 'Sites'. At the top right is a green button with a plus sign and the text 'Add Site'. Below this, it says '1 record(s) found. Showing 1 - 1'. A table with two columns, 'Name' and 'Location', contains one row with the values 'HQ' and '123 High Street, Street 2, Street 3, Carlow'.

To view the site click on the site name:



The screenshot shows the 'Site Information' page. It has a header with a location pin icon and the text 'Site Information'. Below is a table with the following fields and values: Site Name (HQ), Address (123 High Street, Street 2, Street 3), City (Carlow), County (Carlow), Postcode, and Country. Below the table is a note: 'If you require a change to any field on this screen which cannot be edited then click on the Request for Change link in the header.' At the bottom left is a green button with a left arrow and the text 'Back'.

If there is no accredited scope element associated with the site there will be an option to edit the site information, otherwise you need to go through the request for change process (see section 12).

To add a site click on the Add Site button and fill in the mandatory details:



The screenshot shows the 'Add Site' form. It has a header with a location pin icon and the text 'Add Site'. Below are several input fields: Name (mandatory), Address (mandatory), three empty address lines, City, County (mandatory, dropdown), Postcode, and Country (mandatory, dropdown). At the bottom left is a 'Cancel' button and at the bottom right is a green 'Save' button.

To add scope elements to this site you must either start a new application process or an application for extension to scope for an existing accreditation.

8.4. Facilities for which laboratory provides Haemovigilance and Traceability Services

This applies to medical laboratories which provide haemovigilance and traceability services to other facilities away from the main laboratory.

For guidance please refer to AML-BB (Minimum Requirements for Blood Bank Compliance with Article 14 (Traceability) and Article 15 (Notification of Serious Adverse Reactions and Events) of EU Directive 2002/98/EC).

Enter details of each HV&T site through the Portal

The screenshot displays two sections of the CRM2 INAB CAB Portal. The first section, titled 'Sites', shows a table with 7 records. The second section, titled 'Facility for which laboratory provides HV/T services', shows a table with 3 records. Both sections include a '+ Add Site' button and a pagination control.

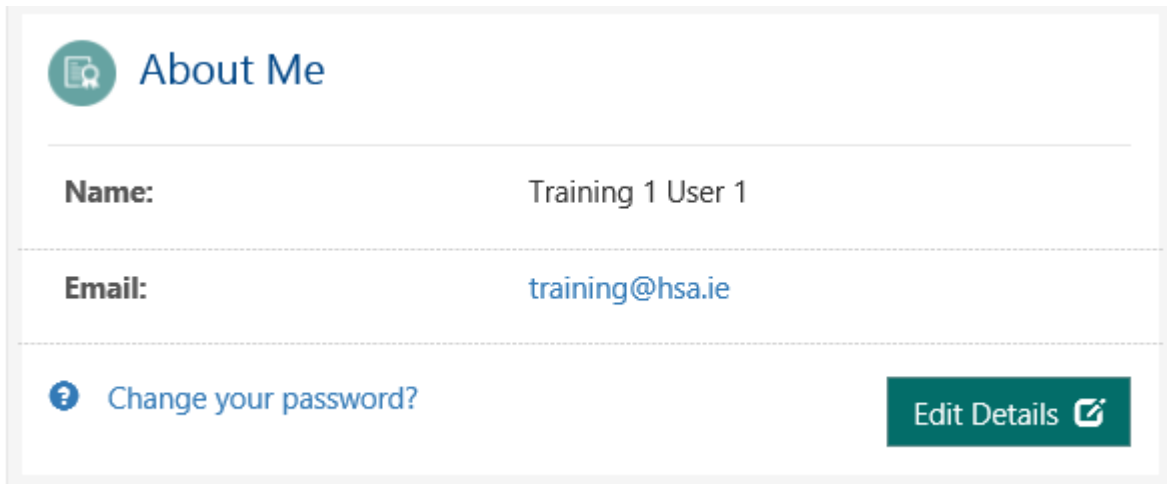
Name	Location
Field Office	Mullingar, Meath, Ireland
Field Office2:	Mullingar, Meath, Ireland
Head Office	Main Street, Liscan, Dublin
New site	field should look in crm too, Cavan, Ireland

Name	Location
HVT site only	iret site only, HVT, Mayo, Ireland
HVT site Twoing labs	HVT site address 1, address 2, Dublin, Ireland
New HVT site	field should look in crm, Carlow, Ireland

9. My Account and User administration

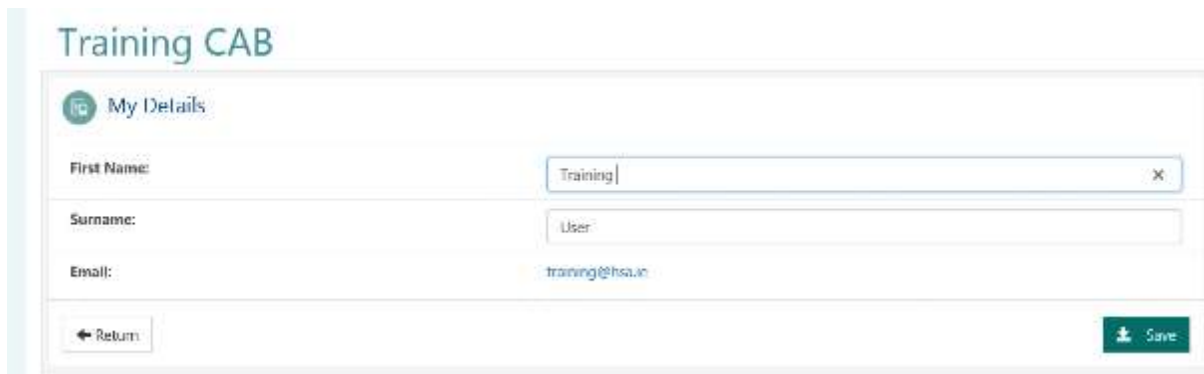
9.1. Edit name and change your password

Under My Account you can see your name and email:



The screenshot shows a user profile page titled "About Me". It features a circular profile icon with a magnifying glass. Below the title, there are two rows of information: "Name: Training 1 User 1" and "Email: training@hsa.ie". At the bottom left, there is a link "Change your password?" with a question mark icon. At the bottom right, there is a green button labeled "Edit Details" with a pencil icon.

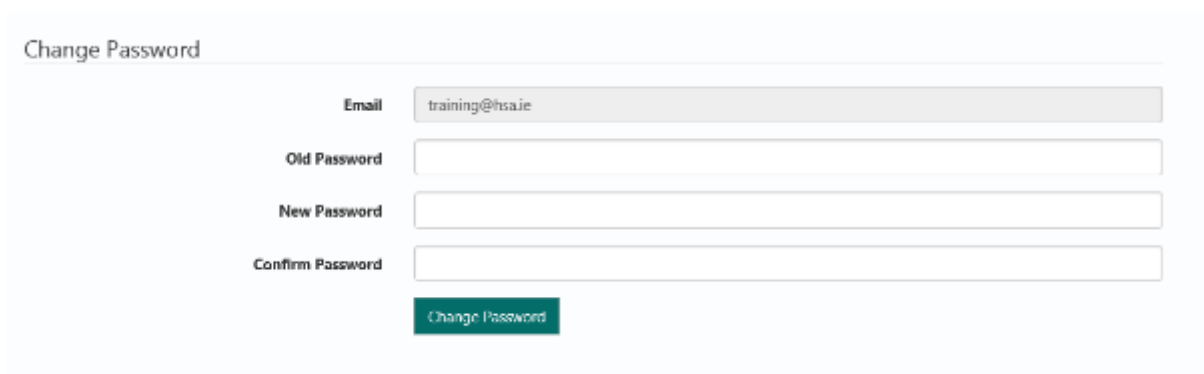
To edit your name click on edit details:



The screenshot shows the "My Details" edit form. It has a title "Training CAB" and a sub-header "My Details". There are three input fields: "First Name" with the value "Training", "Surname" with the value "User", and "Email" with the value "training@hsa.ie". At the bottom left, there is a "Return" button with a left arrow icon. At the bottom right, there is a green "Save" button with a download icon.

Make the changes and press save. You cannot change your email as this is what is used to log into the portal.

To change your password click on the Change your password link:

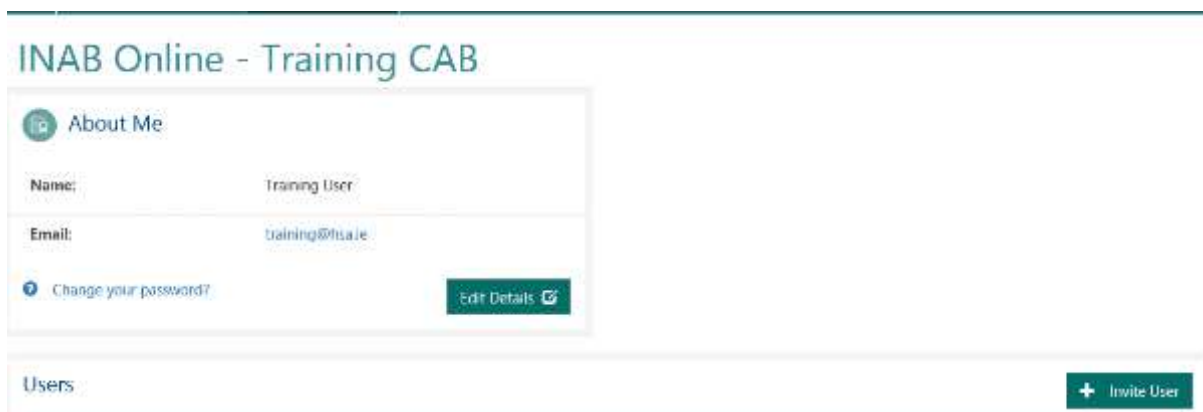


The screenshot shows the "Change Password" form. It has a title "Change Password". There are four input fields: "Email" with the value "training@hsa.ie", "Old Password", "New Password", and "Confirm Password". At the bottom, there is a green button labeled "Change Password".

Enter in your old and new password which also needs to be confirmed. Click on the Change Password button.

9.2. Invite Users

Each CAB can have an administration portal account. An administration account can invite users to login to the portal:



The screenshot shows the 'About Me' section of a user profile in the 'INAB Online - Training CAB' system. The profile information is as follows:

Name:	Training User
Email:	training@tsa.ie

Below the profile information, there is a link 'Change your password?' and an 'Edit Details' button. At the bottom of the page, there is a 'Users' section with an '+ Invite User' button.

Click on the Invite User button (if you do not see this when you do not have administration access):



The screenshot shows the 'Invite a User' form. The form is titled 'Contact Information' and contains the following fields:

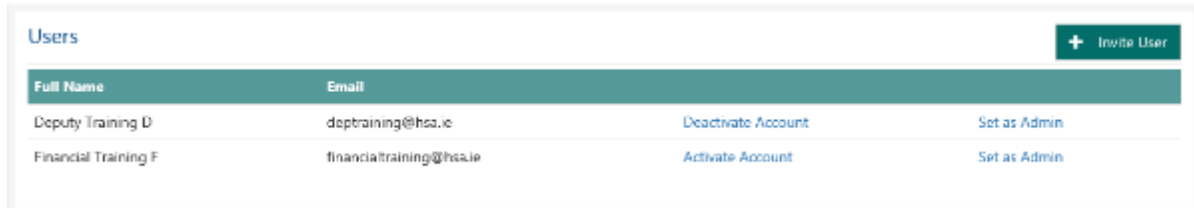
- First Name:
- Surname:
- Email Address:

At the bottom of the form, there is a 'Cancel' button and a 'Submit' button.

Enter in the first name and surname and the email address and click on submit. The Email must not exist in the system already (you will be informed if this is the case).

9.3. Account activation/de-activation

If someone in your CAB has left or re-joined you can activate or deactivate their account.



The screenshot shows a 'Users' management interface. At the top right, there is a '+ Invite User' button. Below it is a table with two columns: 'Full Name' and 'Email'. The table contains two rows of user data. For each row, there are two buttons: 'Deactivate Account' and 'Set as Admin'.

Full Name	Email	Deactivate Account	Set as Admin
Deputy Training D	deptraining@hss.ie	Deactivate Account	Set as Admin
Financial Training F	financialtraining@hss.ie	Activate Account	Set as Admin

If you click on deactivate account then the user will no longer be able to log into the portal.

If the link states activate ensure they have registered for an account with the email that was sent to them.

If they have logged into the portal previously and an administrator has deactivated them then clicking on activate means they will be able to log in again.

9.4. Set as admin/remove as administrator

By default the primary contact is the only Administrator on the portal.

You can make any user on the site an Administrator which means they can invite users/activate/deactivate or set others to be Administrator.

As an administrator you can click on Set as Admin to make that user an administrator. Alternatively you can click on Remove Admin status on a user so they can still log into the account but they will not be able to do CAB user management.



The screenshot shows a 'Users' management interface. At the top right, there is a '+ Invite User' button. Below it is a table with two columns: 'Full Name' and 'Email'. The table contains two rows of user data. The first row is for 'Deputy Training D' with email 'deptraining@hea.ie' and buttons for 'Deactivate Account' and 'Remove Admin Status'. The second row is for 'Financial Training F' with email 'financialtraining@fisa.ie' and buttons for 'Activate Account' and 'Set as Admin'.

Full Name	Email		
Deputy Training D	deptraining@hea.ie	Deactivate Account	Remove Admin Status
Financial Training F	financialtraining@fisa.ie	Activate Account	Set as Admin

10. Library

The library is where you will find any INAB documents which may be useful to you during the application or accreditation phases. It is a list of documents which you can click to open.



[User Guide](#) | [Accreditation Queries](#) | [Request](#)



11. Queries and Feedback

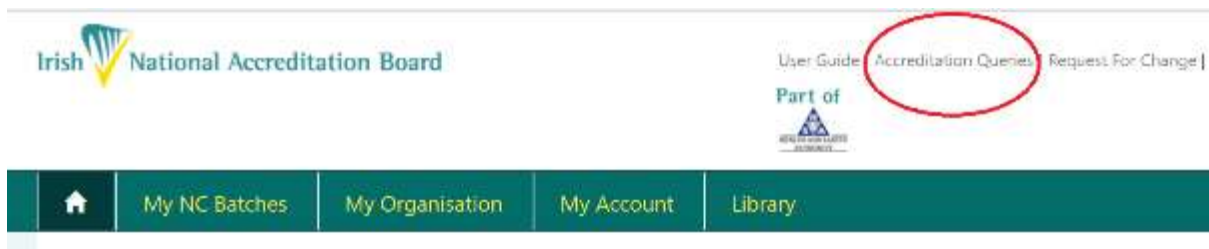
11.1. Queries related to your Accreditation

Queries related to your accreditation may be submitted through the INAB portal.

Once your query is submitted, it will be sent to the assessment manager responsible for your CAB. This should be used in place of direct email.

Following an initial roll-out period in 2020, this will become a mandatory route for communication and will assist us to track and trend queries to INAB centrally.

[Access via your homepage in the CAB portal](#)



Input your query and submit.

Accreditation Query

Please confirm your accreditation query for your Assessment Manager below. You can request a response to individual emails to queries within 10 working days, if the Assessment Manager is on leave or business absence, this will result in a slightly longer response time.

Queries on visit scheduling requests and planning, should be directed to scheduling@inab.ie

Please review the INAB Customer Charter on our website for information on feedback mechanisms and INAB contacts.

Query*

Feedback

Please feel free to contact us with any query you may have.

Subject*

Please select an option

Feedback*

11.2. General feedback

INAB is committed to offering a professional standard of accreditation services and welcomes all feedback from applicant/accredited clients about the services it provides. There are a number of feedback mechanisms through which stakeholders can submit this feedback. Refer to INAB Policy Statement on Mechanisms of Feedback to INAB (PS25) for details.

General feedback may include client feedback, INAB CRM (Customer Relationship Management) feedback, assessor feedback and complaints feedback.

Applicant/accredited clients may also use these feedback mechanisms for disagreements in relation to recommendations of INAB assessment teams and in relation to any adverse decisions on a client's accreditation status.

12. Request for Change

There are a number of items which cannot be changed on the portal. For these you will need to submit a request for change to INAB:

Request For Change

Did you know you can request the following on the accreditation page:

- Minor scope element text change which can be approved by your assessment manager
- Request suspension or withdrawal of scope element or entire scope
- Apply for extension to scope

On an Event you can:

- Acknowledge the assessment team
- Upload documents for an assessor or team
- Review your assessment report
- Respond to nonconformities

If you want to request something additional please pick from the list below.

Purpose*

Title*

Please enter in enough detail for assessment manager to action*

In the title line, enter a high level description of what needs to change e.g. the CRO number. In the description give the full information of what needs to be changed and submit.

INAB will respond to this request.

13. Appendix A – Additional guidance on editing/amending your existing scope

There are a number of different functions within the CAB Portal that allow edits, amendments and extension of your existing scope.

These are:

- **Application for Extension to Scope** (Section 5 of the Cab Guidelines) – allows CABs edit and add new scope elements. This includes reduction of measurement uncertainties, increase accredited range of measurement, and expansion of accredited range of measurement.
- **Withdraw Scope elements** (section 7.4) – allows you to select scope elements and withdraw them from your schedule. Note: this is a permanent removal.
- **Minor Edits** [section 7.3]– for small changes like spelling errors

APPLY / EDIT MY EXISTING SCOPE – USING THE EXTENSION TO SCOPE APPLICATION FUNCTION

Click into your accreditation on the portal, to access the apply/Amend your scope

- **You will be presented with a wizard that brings you through steps 1 – 4.**
- NB – at step 1 – your existing standard/sub scopes will be greyed out.
 - Just add your description (Clearly outlining what you intend to do) and save and proceed.



Example of description

(Unless you are adding a new sub scope, you choose Add Sub scope, after you add description, then save and proceed. Complete step 2.

- **Once at Step 3**
 - You can edit your scope (within the table using the In-line editor),
 - Identify your flexible scope elements
 - Add new scope elements (in the table OR download the template).
- You cannot do both i.e table edits and upload new scope elements.

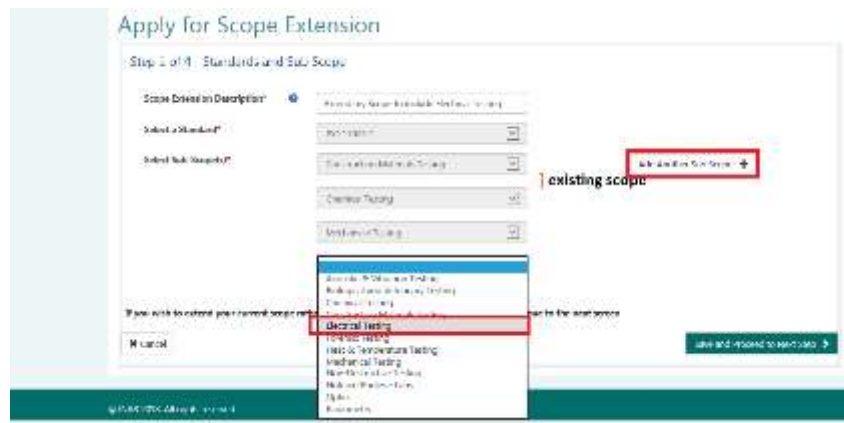
If you wish to edit existing scope and add new elements this will need to be done in the in-line table editor. Downloading the template should only be used when you are adding a significant number of NEW scope elements only.

HOW DO I ADD ANOTHER SUB SCOPE TO MY ACCREDITATION?

At Step 1 of the application wizard:

Click on Add another Sub Scope:

Choose the relevant sub scope you wish to add, in this example we are adding the sub scope **Electrical Testing**.



- Click on save and proceed to the next step
- Complete step 2, and save and proceed.
- At step 3 you will be presented with your Scope of Accreditation.

How do I add the new scope elements for e.g electrical testing?

At step 3 of the application wizard, you will be presented your scope.

You can add new scope elements in **two ways**;

- 1) **Table in-line editor**
- 2) **Download an excel template**, complete and upload into the system.

THE TABLE IN-LINE EDITOR

It is advisable to use this for adding a short scope, or when making amendments to existing scopes.

Adding in new scope elements in the table

Once you have completed steps 1 and 2 of the Application for extension wizard, you will be presented **with your scope in a table format**.

- Click into the relevant tab (in this example electrical testing)
- To add in a new scope element – scroll to the end of the table.
- Start at the first cell, choose the relevant site and work across the row choosing the relevant drop down choice.
- Then complete the open text cells i.e Test descriptions, ranges, etc relevant to your standard.
- You can widen the columns by clicking on the top heading line that divides each header

Click into the cell and add the text you wish to add if you can also add in your ISO/IEC for this scope if you wish'."/>

- Click into the Cell that you wish to edit / add text

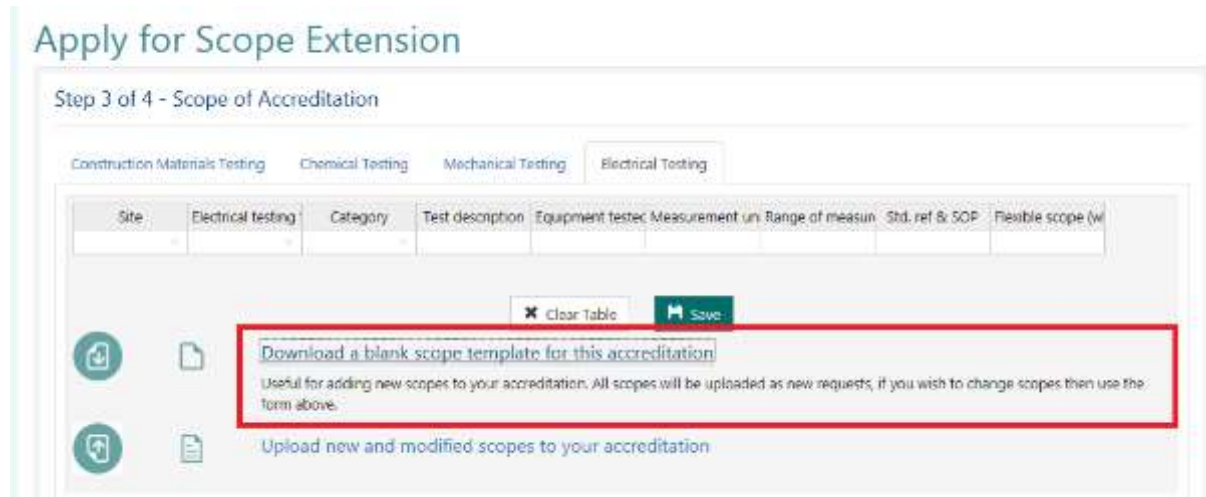
- If you are changing the drop down option listed – (first 4 fields) this must be chosen from the drop down menu.
- Regularly save as you proceed.
- Once completed Save and submit.
- This is also where you can determine your flexible scopes (see the FS factsheet for further information).

USING THE EXCEL TEMPLATE

This is for adding in **NEW** scope elements, **not editing**.

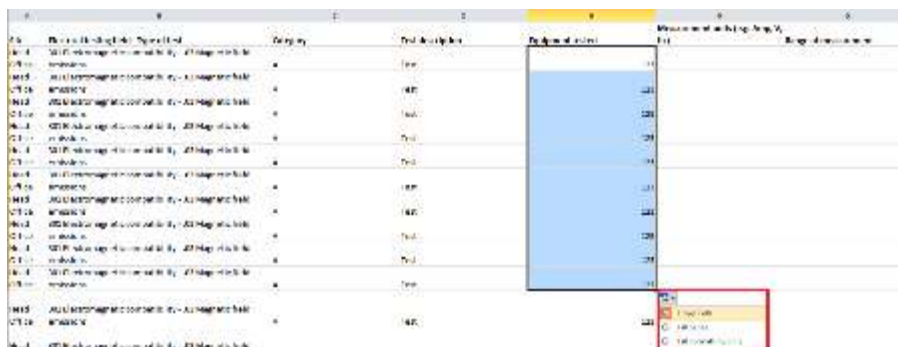
It is recommended to use the excel template if you have a long scope to add, as you can copy/drag to assist with duplicate entries.

NB - you cannot use just any template from excel - you MUST download the blank template within the ext to scope application section. Click into Download a blank scope template for this accreditation to access this template. This is the only one you can then upload once completed.



- Choose download blank scope template in Step 3
- Excel template opens
- Complete the excel template

NB-Ensure that when you drag/copy cells with numerical content =, choose COPY Cells (indicated in screen below) to ensure that each cell is copied.



- When finished – save your excel document
- Choose Upload template in step 3 – browse

NB - If **copying and pasting** within a drop down menu, ensure that you choose from the drop down menu first and drag down. Do not type text into drop down fields.

HOW TO EDIT YOUR SCOPE USING THE TABLE INLINE EDITOR?

- You will need to complete steps 1 and 2 firstly.
- At step 3 of 4, you will see your Scope of Accreditation
- Note that you may be presented with multiple tabs depending on your Scope
- Click into the relevant tab to make you edits

Apply for Scope Extension

Step 3 of 4 - Scope of Accreditation

THIS IS THE IN LINE TABLE EDITOR

Histopathology and Cytopathology
Haematology
Microbiology and Virology

Status	Site	Medical pathol	Category	Test/assay	Specimen Type	Equipment / loc	Method (CL/No	Range of meas	Std. ref & SOP
Accredited	Head Office	1051 Histopathology -13 Molecular testing	A	Detection of PPScc by Western Blotting in Query CJD Cases	Human Tissue Fluid	Manual	N/A	N/A	LP-NCJD-FRHWLS/ERN
Accredited	Head Office	1051 Histopathology -13 Molecular testing	A	Clinical Exome test, 4813 genes covering 12Mb genomic context	Human Tissue Fluid	Manual	N/A	N/A	LP-NFL-NGS-TS1
Accredited	Head Office	1051 Histopathology -13	A	Determination of 1p/19q status in	Human Tissue Fluid	Manual	N/A	N/A	LP-NFL-Arey CGH

Note: When editing the scope using the in-line editor **remember to save regularly**. Saved edited scope elements will change status from Accredited to 'Accredited Edited'

Accredited Edited	Head Office	1030 Haematology -02 Visual examination of blood films	A	note that the status changes to edited.	EDTA Whole Blood	Hematek Staining machine and manual microscopy	N/A	TEST	LP-HAEM-009
-------------------	-------------	--	---	---	------------------	--	-----	------	-------------

HOW WILL I KNOW WHAT WAS SUBMITTED IN MY APPLICATION TO AMEND/EXTEND SCOPE?

If you log into your **application for Extension to scope**, you will be presented with the scope elements that you have edited. You will also find a link to the documents you attached with your application.

Head Office

Sub Scope	Scope Item	Category	Scope Element
Haematology	1030 Haematology -02 Visual examination of blood films	A	Blood film - click into the cell and add the text you wish to add/ you can also add in your 1,2,3,4 for flexible scopes this way.
Haematology	1030 Haematology -03 Erythrocyte sedimentation rate	A	ESR - ORLA
Haematology	1030 Haematology -01 Blood counts	A	Full Blood Count - ORLA
Haematology	1030 Haematology -41 General haemostasis	A	PT, INR - ORLA

I NEED TO WITHDRAW SCOPE ELEMENTS THAT ARE INCORRECT OR NO LONGER ON OUR SCOPE:
If you wish to delete a scope element you need to withdraw that scope item see section 7.4 of this guideline.

I NEED TO DO A SMALL EDIT TO MY SCOPE (Spelling)

Minor Edits – (see section 7.3) can be used for small changes that would not require manager/board approval – e.g spelling errors.

TROUBLESHOOTING:

When I upload my excel template, it advises I have an error – this scope could not be uploaded row 2 missing or invalid site?

Apply for Scope Extension

Step 3 of 4 - Scope of Accreditation

Construction Materials Testing Chemical Testing Mechanical Testing **Electrical Testing**

The scope could not be uploaded:
- Row 2: Missing or invalid site.

Site	Electrical testing	Category	Test description	Equipment tested	Measurement unit	Range of measure	Std. ref & SOP	Flexible scope (w/

- The above error advises that your scope could not be uploaded, as row 2 has missing or invalid site. Return to your excel document you saved. **Review row 2.**

Site	Electrical testing field	Type of test	Category	Test description	Equipment tested	Measurement unit (e.g. Amp, V, Hz)	Range of measurement
14		101 Electromagnetic compatibility - 03 Magnetic field	A	101		120	455 2+2344
15		101 Electromagnetic compatibility - 03 Magnetic field	A	Test		120	455 2+2344

- In row 2 – in the SITE column (this is a drop down menu) there is text typed into the cell. This will return as an error. Cells with drop down options can only use drop down options,
- Return to the cell and choose the correct option from the drop down menu.
- Save and upload again.

NB – ensure you use drop down options from the first 4 cells only.

I have added scope elements to both the inline TABLE editor, and to the excel template – they will not upload?

You cannot do both. Choose either the inline Table editor OR download the excel template. It is advisable to download the template where you have a large number of scope items to add.

I have edited and updated the original template I used for getting my scope into the CRM when the new system was launched – it won't upload into the portal?

When INAB were launching the CRM – existing CABs were asked to complete a excel template to transfer their scope of accreditation into the CRM.

This was a **one off exercise** by INAB to move all existing cabs scopes into CRM. Any edits or amendments will now need to be made via the Cab Portal using the choices listed above- these templates could only be uploaded once.

On step 1 of the extension to scope wizard – I cannot choose my sub scope, they are all greyed out?

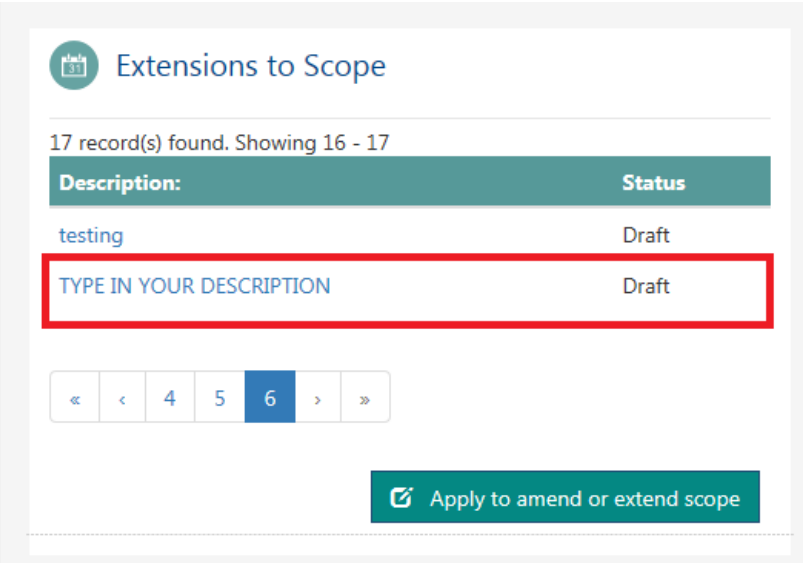
The standard and sub scopes are greyed out - this is just information to show you your current standard and sub scope.

To proceed add your Description at Step 1 and save and proceed. It is not until step 3 that you will be presented with your current scope, it is at this point you can carry out your actions i.e edit, amend, and add new scope elements.

I have not completed my Ext to Scope application; can I save and return to it?

Yes, click save.

You will be able to return to your extension – as it will be saved as a draft under your ext to scope applications. You will find it, by the description name you provided it at Step 1.

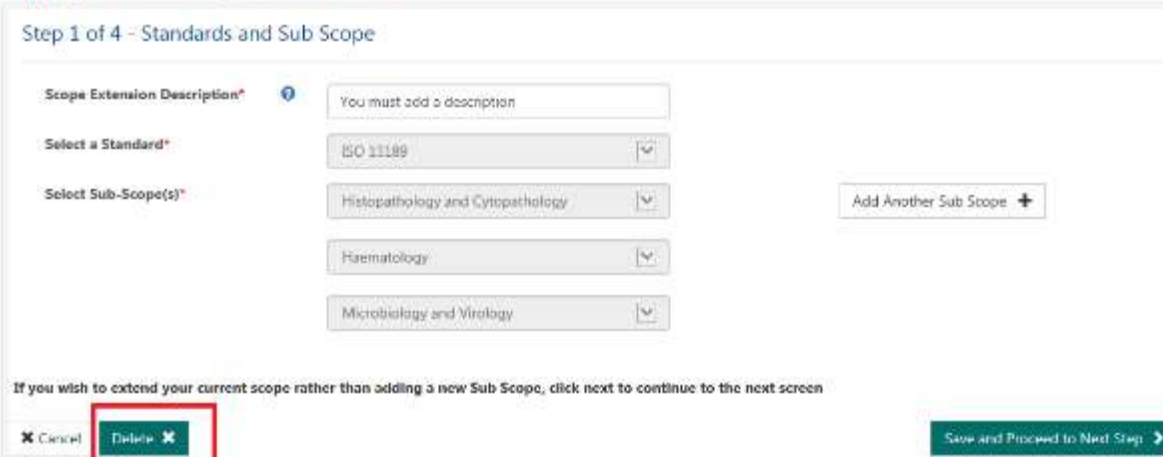


The screenshot shows a table titled "Extensions to Scope" with 17 records found. The table has two columns: "Description:" and "Status". The first row shows "testing" with a status of "Draft". The second row, highlighted with a red box, shows "TYPE IN YOUR DESCRIPTION" with a status of "Draft". Below the table is a pagination control showing page 6 of 6, and a button labeled "Apply to amend or extend scope".

Description:	Status
testing	Draft
TYPE IN YOUR DESCRIPTION	Draft

HOW DO I DELETE EXTENSIONS TO SCOPE?

Apply for Scope Extension



The screenshot shows the "Apply for Scope Extension" form, Step 1 of 4 - Standards and Sub Scope. The form has three main sections: "Scope Extension Description*", "Select a Standard*", and "Select Sub-Scope(s)*". The "Scope Extension Description*" field contains the text "You must add a description". The "Select a Standard*" dropdown is set to "ISO 11189". The "Select Sub-Scope(s)*" dropdown is set to "Histopathology and Cytopathology". There is an "Add Another Sub Scope +" button. At the bottom, there is a "Cancel" button, a "Delete" button (highlighted with a red box), and a "Save and Proceed to Next Step" button. A note at the bottom states: "If you wish to extend your current scope rather than adding a new Sub Scope, click next to continue to the next screen".