



American Society for
Clinical Pathology

ASCP GYN PT Proctor Portal User Guide

7750 Zionsville Rd, Suite 500 | Indianapolis, IN 46268
T 317.569.9470 | F 317.569.0221 | www.ascp.org



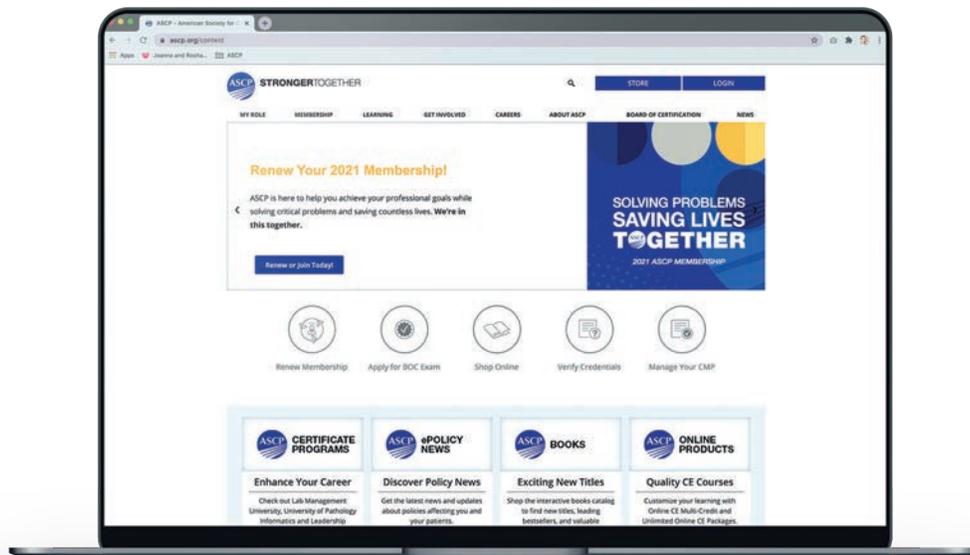
Individuals that have been designated by their Lab Director to act as a GYN Proficiency Testing Proctor must pass a Proctor Exam prior to receipt of testing materials.

- Individuals designated to act as a Proctor will be notified via e-mail to complete the Proctor Exam
- Upon successful completion of Proctor Quiz, a link to the individual's Proctor Certificate will appear on their dashboard

The Proctor Exam is valid for one calendar year (January 1 – December 31) and must be renewed annually.

Proctors will be provided access to the ASCP GYN PT Proctor Portal to administer the GYN Proficiency Testing. The Proctor Portal has the following features:

- Link to the online Proctor Exam
- Acknowledgement of receipt of testing materials
- Verification and inspection of testing materials
- Setting up and managing internal testing events and participants
 - i. Scheduling and maintaining internal testing events
 - ii. Scheduling participants for testing events
 - 1. Sending invitations to Participants
 - 2. Tracking Participant invitation responses
 - 3. Sending e-mail notifications to participants
 - 4. Marking participants as excused or unexcused from testing
- Assignment of testing materials to participants
- Entry of Response Forms
- Finalizing the testing event
- Returning testing materials



1

To access the Proctor Portal, navigate to the ASCP web site at www.ascp.org.

2

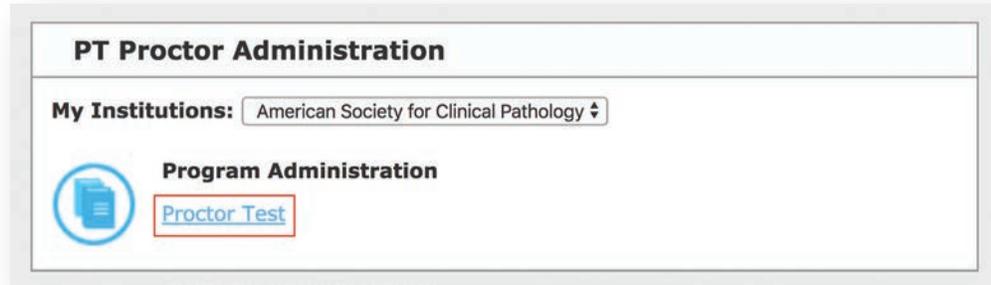
Proctors must have an individual login for the ASCP web site.

If you are unsure if you have an account or have forgotten your login, click on Forgot Username/Password (this will send an e-mail to reset your password) or you can click on Create New Account with ASCP. When you go through the account creation process, we attempt to match you to an existing account based on the information provided. ASCP primarily matches on your e-mail address so you should use the e-mail address (personal or business) that you most likely associate with ASCP.

3

Anyone that has been designated as a Proctor will see the PT Proctor Administration card on their individual dashboard.

There is a link to the Proctor Test if you have not done so already. A link to your Proctor Certificate will be present once the Proctor Test has been successfully completed.



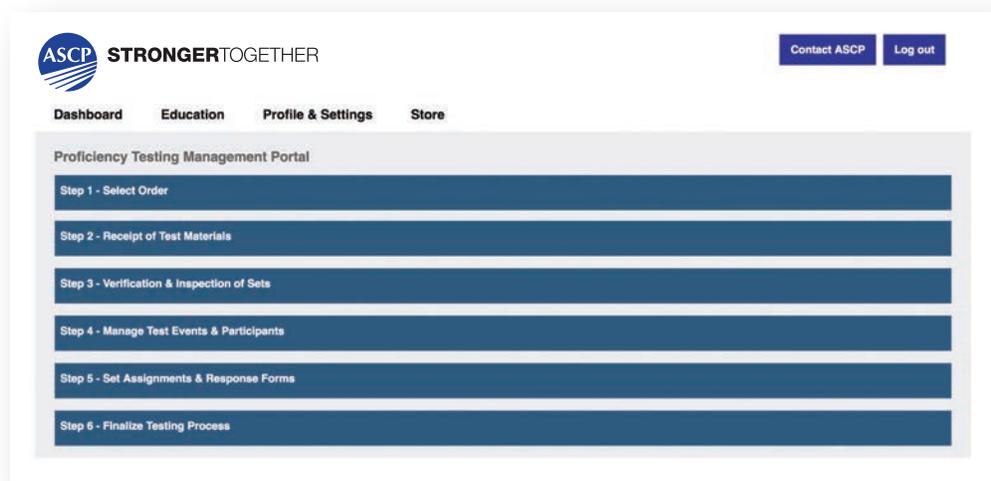
4

Upon shipment of the testing materials, a link will appear on the Proctor card called Receipt & Shipment Management. When you have the testing materials in-hand, you should click on this link.

5

Proctor Portal

Clicking on the **Receipt & Shipment Management** link will take you to the **Proctor Portal** which is an online, stepwise guide through the GYN Proficiency Testing process.



Step 1 – Select Order

If you have only one GYN PT order, you will be automatically directed to **Step 2 - Receipt of Test Materials.**

Proficiency Testing Management Portal

Step 1 - Select Order 4004765488 - PT18-GLASS ✓

Step 2 - Receipt of Test Materials Shipment Received

Shipment Information		Shipment Status	
Order Number	4004765488	Shipment Status:	RECEIVED
Ship To	33 W Monroe St Ste 1600 Chicago IL 60603-5617	Shipment Date:	9/21/2018
		Received Date:	9/21/2018
		Expected Return Date:	9/29/2018
		Days Remaining:	2
		Return Date:	

Accept Shipment

Exit Next

If your Institution has requested multiple prep types for your exam, each prep type will be assigned its own order number. Therefore, you'll need to find the Order Number associated with the shipment you received in the dropdown list and click **Next** to proceed to **Step 2 - Receipt of Test Materials.**

Step 1 - Select Order

Select Order

Exit Next

Step 2 – Receipt of Test Materials

Acknowledge receipt of the shipment by clicking on the **Accept Shipment** button. This will calculate the **Expected Return Date*** for the testing materials to be returned to ASCP using the original packing and pre-paid FedEx airbil and enable the **Next** button. Click **Next** to proceed to **Step 3 - Verification & Inspection of Sets.**

Step 2 - Receipt of Test Materials

Shipment Information		Shipment Status	
Order Number	4004765488	Shipment Status:	RECEIVED
Ship To	Martin Tyrinski 33 W Monroe St Ste 1600 Chicago IL 60603-5617	Shipment Date:	9/21/2018
		Received Date:	9/21/2018
		Expected Return Date:	9/29/2018
		Days Remaining:	2
		Return Date:	

Accept Shipment

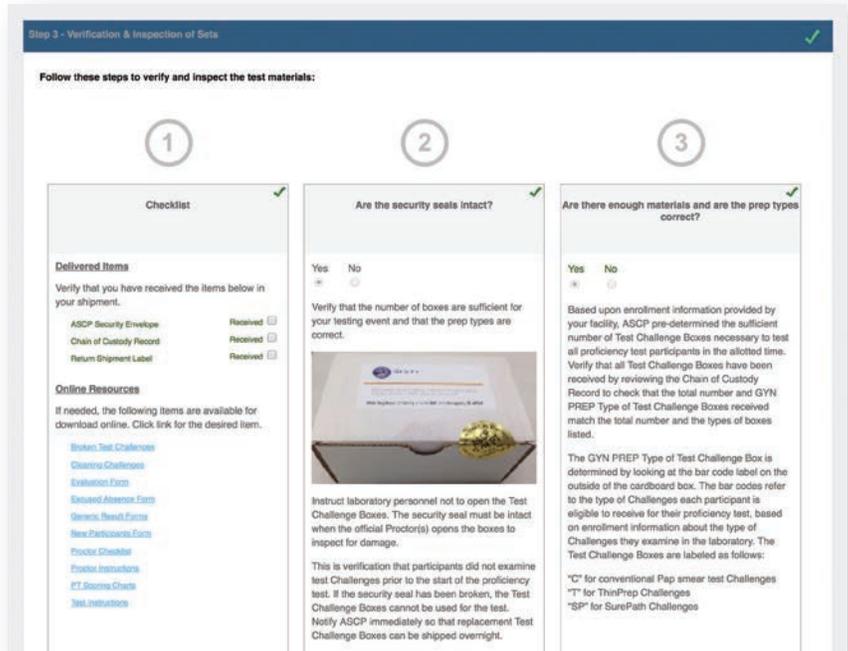
Exit Next

Expected Return Date* = 1 day after scheduled test date

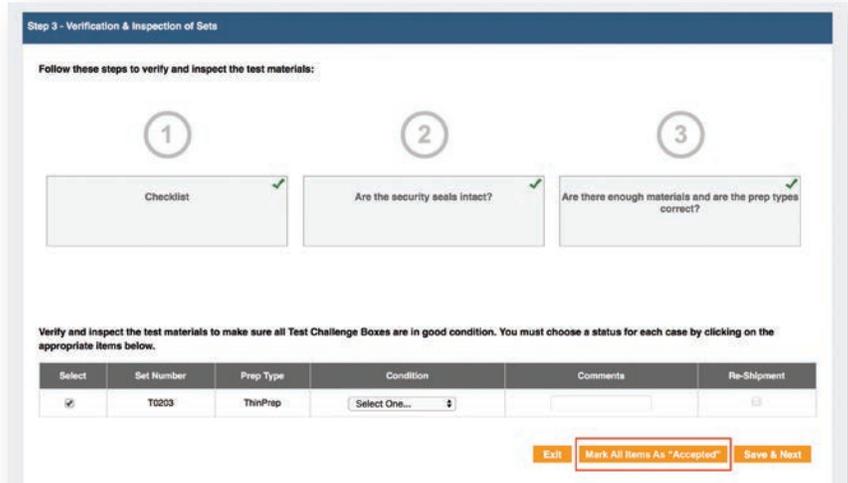
Step 3 – Verification & Inspection of Sets

Proctors must ensure that they have received all the materials necessary to properly administer the GYN PT Testing. If there is anything that may impede the testing process, the Proctor can notify ASCP support staff in this step. Verification & Inspection consists of four steps:

- 1. Checklist** – verify that all the items in the checklist were received with the shipment. The first three items listed are specific for your Site and testing event. The remaining items listed are generic online links to other documentation included in your shipment but are also available for you to download if needed.
- 2. Security Seals** – If all the security seals on the boxes are intact, click **Yes**. Click **No** if any of the seals were broken prior to receipt.
- 3. Number of Sets and Prep Types** – verify that there are enough sets of each prep type to complete testing. If there are enough sets to conduct the testing, click **Yes**. Otherwise, click **No**.
- 4. Set Verification** – The fourth step in the verification process is to break the seal on the box and inspect each slide to ensure all the slides are in good order. If all the slides in the sets received are acceptable, click the **Mark All Items as “Accepted”** button and click **Next** to go to **Step 4 - Manage Test Events & Participants**.



If everything is okay, click the **Step Completed** button. Otherwise, selectively click just the items received and click the **Step Completed** button.



If there are issues with any of the slide(s) in the box, click the checkbox next to the set number and select a choice in the **Condition** column that best describes the problem.

Step 3 - Verification & Inspection of Sets

Follow these steps to verify and inspect the test materials:

- 1 Checklist ✓
- 2 Are the security seals intact? ✓
- 3 Are there enough materials and are the prep types correct? ✓

Verify and inspect the test materials to make sure all Test Challenge Boxes are in good condition. You must choose a status for each case by clicking on the appropriate items below.

Select	Set Number	Prep Type	Condition	Comments	Re-Shipment
<input checked="" type="checkbox"/>	T0203	ThinPrep	Select One... <input checked="" type="radio"/> All Accepted <input type="radio"/> Damages Slides <input type="radio"/> Missing Slides <input type="radio"/> Incorrect Prep Type <input type="radio"/> Shipment Rejected <input type="radio"/> Set Seal Broken		<input type="checkbox"/>

Exit Mark All Items As "Accepted" Save & Next

Note: If any issues were noted during this three step verification process, an e-mail form to ASCP staff will popup with the item(s) in question highlighted. Additional comments can be entered to further elaborate on the problem(s).

Email Inspection

Based on your review of the Chain of Custody, ASCP staff will be notified that the following item(s) were not included with your shipment.

Please enter any additional information or comments below:

- Ascp Security Envelope
- Broken Test Challenges
- Chain Of Custody Record
- Cleaning Challenges
- Evaluation Form
- Excused Absence Form
- New Participants Form
- Proctor Checklist
- Proctor Instructions
- PT Scoring Charts
- Result Forms
- Return Shipment Label
- Test Instructions

Additional comments here

Enter Comments...

Send Exit

If the Condition selected is anything other than **Accepted**, you will receive a popup message asking if you need a reshipment. If so, click **OK** (this will send an e-mail notification to ASCP staff). Additional comments are optional.

Step 3 - Verification & Inspection of Sets

Follow these steps to verify and inspect the test materials:

- 1 Checklist ✓
- 2 Are the security seals intact? ✓
- 3 Are there enough materials and are the prep types correct? ✓

www.ascp.org says
Do you need a reshipment for this box?
Cancel OK

Verify and inspect the test materials to make sure all Test Challenge Boxes are in good condition. You must choose a status for each case by clicking on the appropriate items below.

Select	Set Number	Prep Type	Condition	Comments	Re-Shipment
<input checked="" type="checkbox"/>	T0203	ThinPrep	Missing Slides		<input type="checkbox"/>

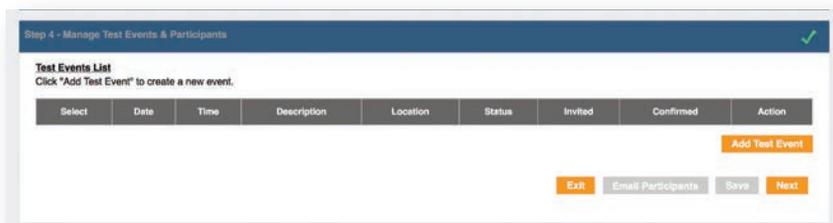
Step 4 – Manage Test Events & Participants

In this step you can schedule as many GYN PT internal testing events as necessary to accommodate your participants. The system will automatically send invitation e-mails to all participants assigned to each testing event. Participants will have the option to **Accept or Decline** the invitation. You can track participant responses in the Proctor Portal.

For example, you could schedule one date and time for the primary screeners and schedule a later date and/or time for the secondary screeners.

Add Test Event

Click on the **Add Test Event** button to create your testing event(s).



Step 4 - Manage Test Events & Participants

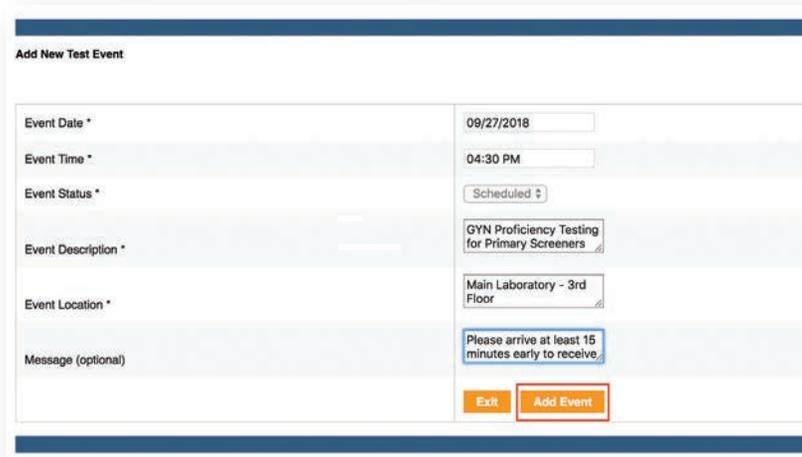
Test Events List
Click "Add Test Event" to create a new event.

Select	Date	Time	Description	Location	Status	Invited	Confirmed	Action
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[Add Test Event](#)

[Exit](#) [Email Participants](#) [Save](#) [Next](#)

Fill in the event details. Event times can be selected in 5 minute increments, however scheduling must provide all testing participants a **2-hour window to complete their 10-slide GYN PT exam**. The message text will be included in the invitation e-mail. This can be used to provide additional information or instructions to participants. When you're done, click **Add Event** to create your event.



Add New Test Event

Event Date * 09/27/2018

Event Time * 04:30 PM

Event Status * Scheduled

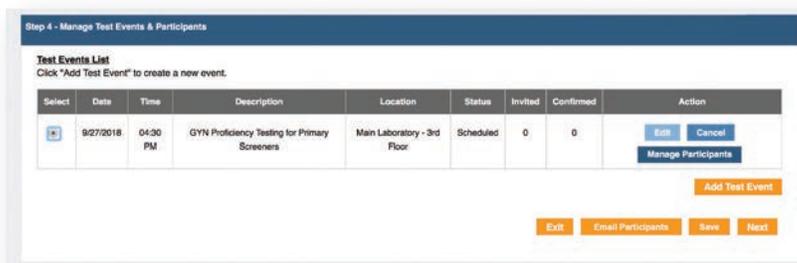
Event Description * GYN Proficiency Testing for Primary Screeners

Event Location * Main Laboratory - 3rd Floor

Message (optional) Please arrive at least 15 minutes early to receive.

[Exit](#) [Add Event](#)

You will be returned to the **Test Events List**.



Step 4 - Manage Test Events & Participants

Test Events List
Click "Add Test Event" to create a new event.

Select	Date	Time	Description	Location	Status	Invited	Confirmed	Action
<input type="checkbox"/>	9/27/2018	04:30 PM	GYN Proficiency Testing for Primary Screeners	Main Laboratory - 3rd Floor	Scheduled	0	0	Edit Cancel Manage Participants

[Add Test Event](#)

[Exit](#) [Email Participants](#) [Save](#) [Next](#)

NEW IN 2019: TESTING INDIVIDUALS CAN NO LONGER SERVE AS PROCTORS.

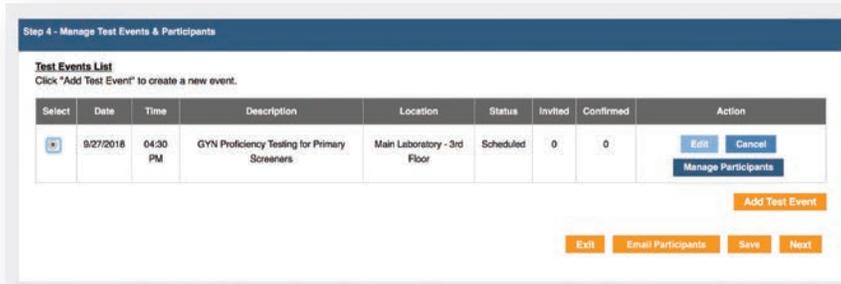
*Sites with a large number of participants may elect to divide the proctoring responsibilities among all the Proctors. If assistance is needed, please call ASCP at 317.569.9470.

Note: If your testing occurs over more than one day, you will need to set up **at least one event per day of testing.** (The event date is automatically populated into the response form and must match the date testing actually took place for each individual.)

At this point you have the option to:

Add Test Event – Create additional events.

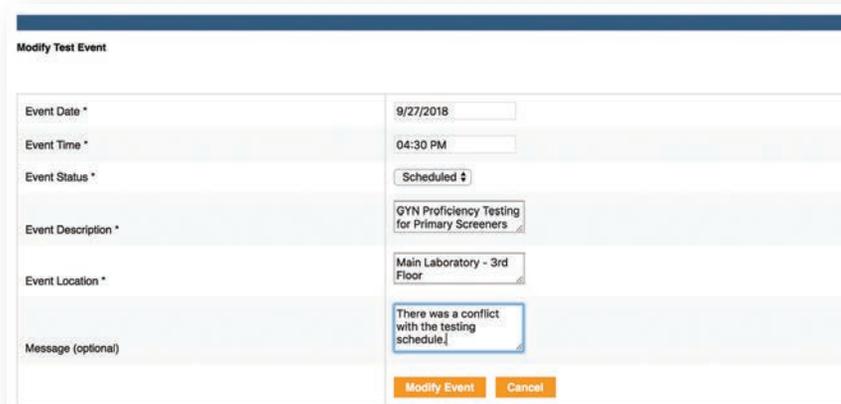
Or, click the radio button associated with an event and **Edit, Cancel** or **Manage Participants**:



EDIT

Change event details by highlighting the radio button for the event and click the **Edit** button.

Click the **Modify Event** button to save your changes. The system will automatically generate notification e-mails to any participants.



CANCEL

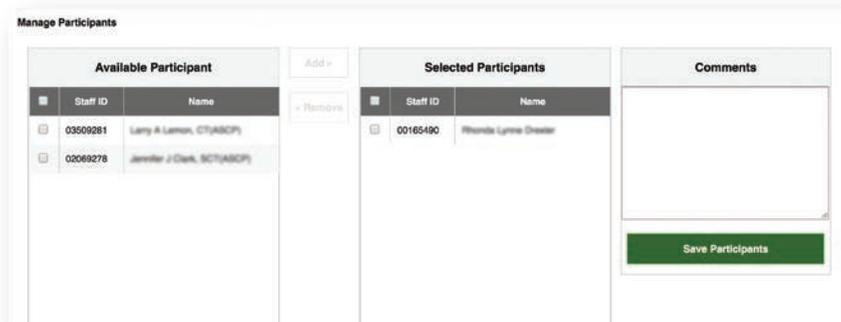
To cancel an event, click on the radio button for the event and click the **Cancel** button.

Modify the **Message** text if you would like and click the **Cancel Event** button. The system will automatically generate notification e-mails to the participants.

If an event is canceled, you must remove all Participants originally assigned to the canceled event.

MANAGE PARTICIPANTS

To add participants to an event, click on the list of **Available Participants** on the left and click the **Add** button to move them to the **Selected Participants** column. If you make a mistake, click the checkbox next to the **Selected Participant** and click **Remove**. You can enter an optional comment that will be included into the invitation e-mail. To send invitations click **Email Participants**.



Note: If you are missing Participants in your list, verify that you have not already added them to another event. If so, remove from incorrect event and add to correct one. If not, call ASCP at 317-569-9470 for assistance.

Participant Invitations – The system automatically generates invitations to participants with an **Accept** or **Decline** option. If an invitation is declined, the participant is required to select a reason from a predefined list of choices, with the option to include additional comments.

Participant Maintenance

Clicking on the radio button next to an event will display a **Participant List** invited to the event. You can update the participant invitation status and testing profile information by clicking the checkbox next to their name. Proctors must review and update each participant's testing profile (MD/CYTO and Screener Type), as well as Primary versus Secondary Screener) prior to the start of the testing event. Click the **Save** button when you are done.

If a participant has not responded to the invitation, the Proctor must also update the participant's **Status** prior to the start of the testing event. Below are the available choices:

Invited – Invitation sent but no reply

Confirmed – Participant confirmed their attendance

Declined – Participant declined the invitation – The proctor should forward the list of all individuals who declined the invitation to the Lab Director for determination as to whether or not their absence should be recorded as an **Excused** or an **Unexcused** absence.

If a participant **fails to reply**, the proctor can manually mark them as **Confirmed** or forward to the Lab Director for determination as to whether or not their absence should be recorded as an **Excused** or an **Unexcused** absence.

Step 5 – Set Assignments & Response Forms

In this step you can assign glass slide sets to the Screeners. Each set must be reviewed by a Primary Screener before it can be assigned to one or more Secondary Screeners. Once a Primary Screener has submitted their responses, the set they reviewed can be assigned to one or more Secondary Screeners.

Select the radio button for an event to see the confirmed **Participant List**. Choose a Participant and select a set from the dropdown under the **Assign to Set** column. Click the **Save** button.

If the Participant is a Primary Screener and the set assignment dropdown is empty, verify that you accepted set(s) in **Step 3 - Verification & Inspection of Sets**.

If the Participant is a Secondary Screener and the set assignment dropdown is empty, verify that the set has been pre-screened by a Primary Screener. The Proctor must then select the individual who pre-screened the set from the dropdown under **Pre-screened PTR**. Click the **SAVE** button.

TO PRINT RESPONSE FORMS FOR TESTERS: After assigning the set, click on **Edit Response Form** button for the selected participant. When the Response Form displays, click on **Print Response Form** button. Proctors must record the testing **Start Time** on the Response Form before giving it to the participant with their test slide set.

NOTE: If the participant, or Proctor, enters the responses issued by the primary screener prior to assigning the test box to the secondary-screening physician, the responses rendered by the primary screener will be present in the far right column of Response Form.

Primary Screener Response Form

Secondary Screener Response Form
(with primary screener responses entered)

After a participant completes their Response Form, the Proctor should record the **End Time** on the Response Form. Click on the **Edit Response Form** button to enter the Participant's responses.

Ideally you should have the Participants enter their own responses **AT A WORKSTATION IN CLOSE PROXIMITY TO THE PROCTOR** and double check everything before final submission. This reduces the chance of data entry errors.

If this is not possible, the Proctor must enter the responses for the participants. The tester should have the opportunity to review the responses entered by the Proctor prior to "submitting" their answers.

If the participant does not indicate a response for a case(s), the Proctor is to leave the response category BLANK for that case.

Response Form for:

Customer Name: Florida Lynne Greiner
 PTR Number: CMS00792
 Set Code: T0203
 Prep Type: ThinPrep
 Screener Type: Primary

Start Time:
 End Time:

[Print Response Form](#)

Case	Age	LMP	UNSAT	NEG	LSIL	HG & Above
1	52	PMP	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	34	DAY 18	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	33	DAY 16	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4	30	3 MO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5	23	DAY 17	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6	27	DAY 8	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	45	DAY 15	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	30	DAY 21	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	50	DAY 18	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
10	29	DAY 8	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

I have read, understand and followed the ASCP Gyn PT Instructions as presented to me by the Laboratory PT Proctor.
 I hereby attest that the cytology proficiency test slides were independently diagnosed by me in the same manner as patient specimens, to the extent allowed by testing policies.

Tester Signature: Date:
 Proctor Signature: Date:

[Exit](#) [Save](#) [Submit](#)

Responses can be saved incrementally by clicking the **Save** button.

Both the Participant and Proctor's name must be typed into the form and dated. Date for both must be the day the test was taken and entered into the system.

Click the **Submit** button for the final submission. *After submission, the Response Form is final and cannot be changed.*

After all Response Forms have been entered, click the **Next** button to go to **Step - 6 Finalize Testing Process.**

Step 5 - Set Assignments & Response Forms

Assign sets to the participants for test events below:

Test Events List

Select	Date	Time	Description	Location	Status	Invited	Confirmed
<input checked="" type="radio"/>	12/22/2017	04:30 PM	GYN Proficiency Testing for Primary Screens	Main Laboratory - 3rd Floor Bldg H	SCHEDULED	1	1
<input type="radio"/>	12/28/2017	03:00 PM	GYN Proficiency Testing for Secondary Screens	Main Lab	SCHEDULED	3	0

Participants List
 List of participants that have been assigned to the selected Test Event
 NOTE: If there are any missing participants from the list, please [contact ASCP](#)

Participant	Assign to Set	Screener Type	Pre-Screened PTR	Action
Michael Novitskiashvili	T0042	Primary Screener	NA	Edit Response Form

[Exit](#) [Save](#) [Next](#)

Step 6 - Finalize Testing Process

To close out the testing, you must sign-off that testing is complete. Click the checkbox and enter your name in the **Proctor Signature** box and select your Lab Director from the choices available in the **Select Lab Director** dropdown. Click the **Notify Lab Director** button to complete this step.

The Lab Director will receive an email entitled **PROFICIENCY TESTING EVENT APPROVAL & SIGNOFF**. The Lab Director must electronically approve and sign off on the attestation statement included in the email in order to finalize the testing event.

Upon Lab Director sign-off, the Proctor will receive a confirmatory email and the **Return Shipment** button will no longer be greyed out.

You are required to return the testing materials to ASCP by the expected return date. Click on the **Return Shipment** button when this is done. A notification e-mail will be sent to ASCP staff.

Your Lab Director will be notified via e-mail when the scoring results are available on his/her dashboard.

Step 6 - Finalize Testing Process

Please review the checklist and mark the checkbox to complete the testing process:

1. I have checked with each test participant to gather all supplies, documents and Test Challenges Boxes related to this Proficiency Test
2. I have had all the participants sign the attestation statement at the bottom of the PT Result Forms at the conclusion of the test, attesting they diagnosed the cases independently.

I have read the checklist and confirm that all the testing processes are complete and ready for return shipment.

Proctor Signature: * Date: 09/25/2018

After signing off for all events, select the appropriate Lab Director and click the "Notify Lab Director" button. Once the Lab Director has signed off, return to this step and click the "Return Shipment" button to finalize all events for this order.

Select Lab Director: *

Exit Notify Lab Director Return Shipment

Step 6 - Finalize Testing Process

Please review the checklist and mark the checkbox to complete the testing process:

1. I have checked with each test participant to gather all supplies, documents and Test Challenges Boxes related to this Proficiency Test
2. I have had all the participants sign the attestation statement at the bottom of the PT Result Forms at the conclusion of the test, attesting they diagnosed the cases independently.

I have read the checklist and confirm that all the testing processes are complete and ready for return shipment.

Proctor Signature: * Date: 09/25/2018

After signing off for all events, select the appropriate Lab Director and click the "Notify Lab Director" button. Once the Lab Director has signed off, return to this step and click the "Return Shipment" button to finalize all events for this order.

Select Lab Director: *

Exit Return Shipment

Note: SCORING OF THE TESTING EVENT WILL NOT TAKE PLACE UNTIL THE PROCTOR SELECTS "RETURN SHIPMENT".

Lab Director Summary Reports will be available the same day the GYN PT shipment has been returned unless it has been selected to be audited. Once the audit is complete, the Lab Director Summary Report will be released, an email will be sent to the Lab Director, and a link will appear on his/her dashboard.

**Return the following items to ASCP
upon completion of your testing event:**

- Test box(es)
- Signed and dated Chain of Custody Record
- Signed and dated Proctor Attestation
- Completed Proctor Checklist and Broken Slide Form
- Signed and dated Laboratory Director Attestation Form
- Add Participate Form, if appropriate
- Signed and dated Participant Response Forms



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