



Institute for Quality  
Management in Healthcare  
Centre for Proficiency Testing

# Proficiency Testing Guide to QView™

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## Contents

Introduction .....	3
Chapter 1 - Getting Started.....	4
Instructions for Logging in to QView™ .....	4
Your Site's Home Page.....	6
Managing your QView™ account.....	7
Sign up to receive e-notices.....	7
Are you a QView™ Super Site Administrator? .....	8
Navigating within QView™ .....	9
Adding New Users in QView™.....	10
Updating User Information .....	11
Modify/Manage Permissions .....	13
Chapter 2 – Submitting PT Survey Results.....	14
Locating the Form.....	14
Completing the Form .....	15
Submitting the Form.....	16
Confirmation of Save or Submit .....	16
Problems Saving or Submitting .....	16
Chapter 3 – Creating Additional Analysis Worksheets.....	17
Chapter 4 – Submitting a Request for Additional Material.....	18
Chapter 5 – Submitting Discordant Findings Investigation Forms.....	22
Chapter 6 – Review Survey Reports and Other Documents .....	23
Folder Navigation.....	24
Recently Posted Documents.....	24
Creating Bookmarks or Shortcuts to your Favourite folders .....	25
Chapter 7 – Uploading files to QView™.....	26
Chapter 8 – Method Code Definition.....	27



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Management in Healthcare

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## PROFICIENCY TESTING GUIDE TO QVIEW™

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**Page 2 of 45**



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Chapter 9 – Submission of Proficiency Testing Appeals and Complaints .....	28
Chapter 10 – Contacting IQMH or Your Site Administrator .....	29
Chapter 11 – Frequently Asked Questions - QView™ Electronic Forms.....	30
Appendix A – Detailed Instructions for Logging in to QView™ .....	33
Appendix B – Detailed Instructions for Adding New Users.....	35
Appendix C – Detailed Instructions for Method Code Definition.....	41
Appendix D – Revision History .....	44



## Introduction

Welcome to QView™, the Institute for Quality Management in Healthcare (IQMH) Internet-based application for securely sharing information with our clients.

Each participating facility is provided with a QView™ web site, and QView™ accounts are created for individuals to provide them with secure login access to the site. Your QView™ site is secure and password protected and you control the access.

This document will help you to login to QView™, explain what you can see and do in your QView™ web-site and explain what your responsibilities are in using QView™.

With QView™ you can:

- *View IQMH announcements and site-specific notices*
- *Contact IQMH*
- *Submit your proficiency testing survey results for the surveys for which you have registered*
- *Review your proficiency testing survey reports*
- *Access educational documents such as committee comments, consensus practice recommendations and reviews*
- *Define your testing methods*
- *Submit your discordant findings investigation forms*
- *Upload supporting documentation for surveys or discordant findings investigations*
- *Request replacement and retest samples*
- *Manage your personal profile*

Each section of this document will provide you with introductory information on various aspects of your QView™ access. Each section will refer to an Appendix where the instructions are provided in full detail.

## Software Requirements

The content of this site is accessible to any modern web browser including Internet Explorer 11, MS Edge, Google Chrome, Mozilla Firefox, Safari or Opera. JavaScript must be enabled for the browser.



## Chapter 1 - Getting Started

With initial registration for a proficiency testing survey each participating facility is assigned a unique site code identifier (Site ID). Your QView™ Site ID identifies your facility and is used in QView™ and on all documentation and correspondence to relate the material to your facility. Your QView™ Site ID is provided in an email message to you and will be displayed on the Home page once you log in to QView™.

A secure QView™ web site has been created for your facility, and as part of your site's initial registration one or more QView™ accounts has been created with access to this QView™ site.

### Instructions for Logging in to QView™

1. In your internet browser go to the QView™ web portal: [www.qview.ca](http://www.qview.ca) to access the login page:

2. If you do not know your username or password you should click on the **"Forgot your user name or password?"** link on the login page:
  - a. Enter your email address at the prompt – ensure it is typed correctly and is the email address provided to IQMH. It will be the one that was used to send the acknowledgement email to you.
  - b. As indicated, an email message will be sent to the address provided and should arrive within 30 seconds. It will provide your username and instructions for changing your password.
  - c. You may have to check your spam folder for the message.
  - d. Review the message and note your username.
  - e. Click on point #1 – it is an active link.
  - f. Follow the instructions to (re)set your password and you will be able to log in.
3. Your site's QView™ Home page will be displayed.



**If you have problems:**

1. Make sure you are connected to the Internet, using a current web browser as indicated previously.
2. Retype the Username and Password carefully.
3. If you have followed these steps correctly and encounter technical problems logging in, please use the Contact Us link on the QView™ login page.
4. If you feel that your username and password access has been compromised you should change your password.

See [Appendix A](#) for more complete login instructions.



## Your Site's Home Page

The main components of the Home page are:

1. Menu bar
2. Your Site identifier and Site Name
3. Name of the current login
4. Announcements
5. Permanent forms
6. Favourites & Bookmarked folders
7. Active Forms and Worksheets
8. Recently Posted Documents

1. Navigation Menu bar

2. Site ID and name

3. Current user logged in

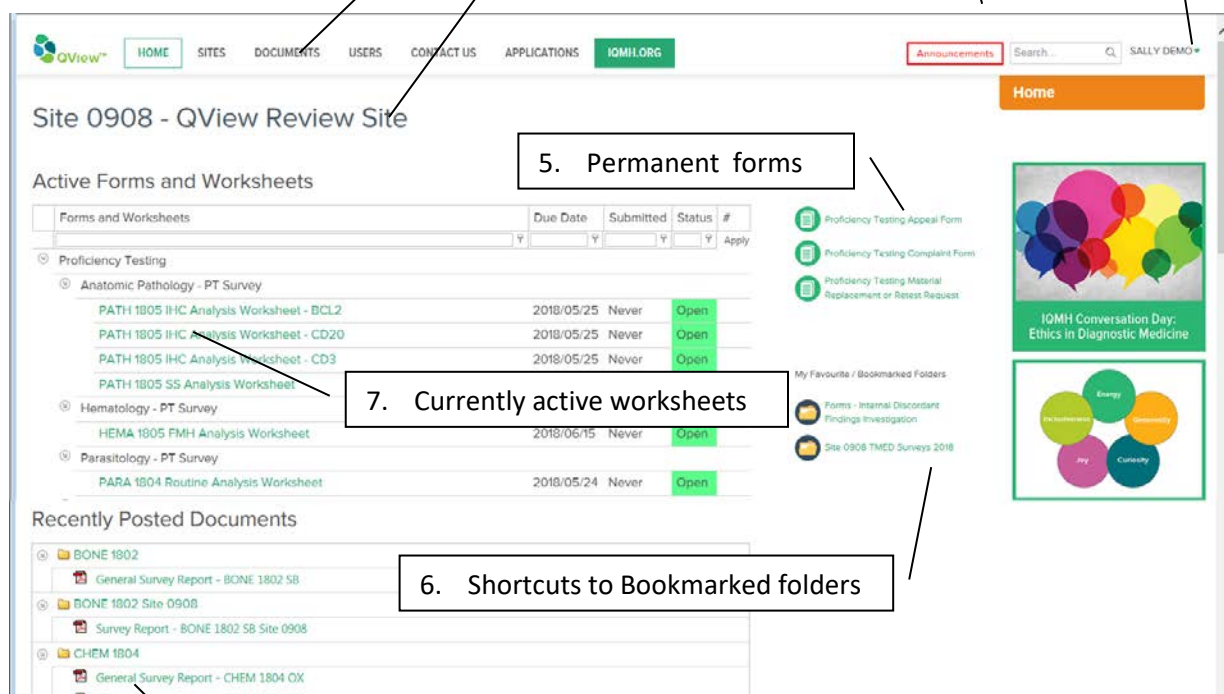
4. Announcements

5. Permanent forms

7. Currently active worksheets

6. Shortcuts to Bookmarked folders

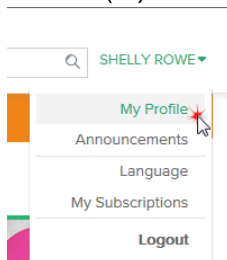
8. Recently Posted Documents





## Managing your QView™ account

To access your user profile in QView™, click on your name in the upper right corner of the screen (3.) and select My Profile:



In your profile you can update your **Email** address and your **Display Name**.

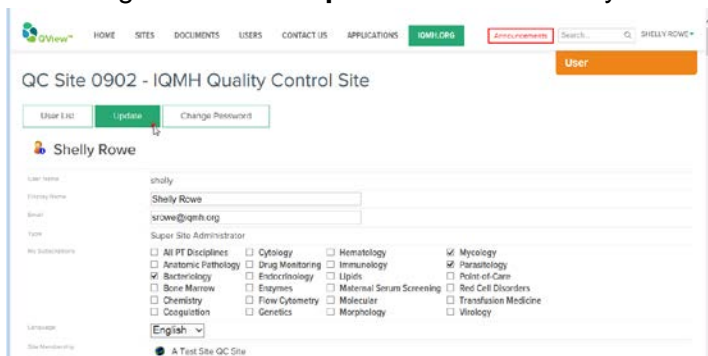
You can change your **password**.

## Sign up to receive e-notices

**My Subscriptions** is where you can sign up to receive email notifications regarding proficiency testing surveys. These proficiency testing notices advise you when the survey worksheets and other important reports are posted in QView™.

When you subscribe to Centre for Proficiency Testing email notices you will receive the notices for the QView™ site shown at the top of the page. If you have access to other sites you must switch sites to subscribe to notices for the other site(s). See [Navigating within QView™](#) for further information on switching sites.

Don't forget to use the **Update** button to save your changes:







## Are you a QView™ Super Site Administrator?

Your QView™ user profile will indicate whether you are a Super Site Administrator or Site Administrator for a given site.

As a Super Site Administrator or Site Administrator in QView™ you are able to manage your laboratory personnel's access to reports and additional functions.

There are 3 types or levels of permission in QView™:

### ***Super Site Administrator (SSA)***

- highest level of permission;
- can create and manage accounts at the Site Administrator and Member level, i.e. at levels below SSA;
- can manage their own account attributes, but cannot change their own access properties.

### ***Site Administrator (SA)***

- middle level of permission;
- can create and manage accounts at the Member level only;
- can manage their own account attributes, but cannot change their own access properties.

### ***Member***

- basic level;
- can manage their own account attributes, but cannot change their own access properties.

## How Does This Affect You?

As a Super Site Administrator you have overall responsibility for security of the site's QView™ access and are responsible for:

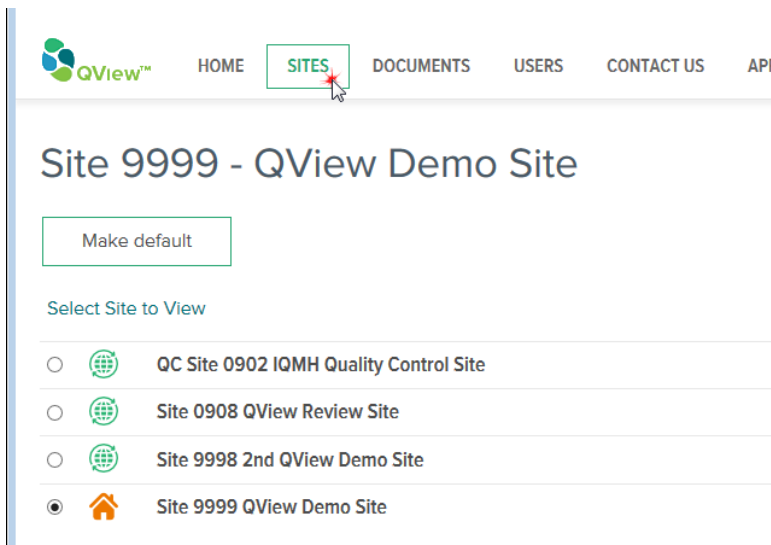
- [Creating new QView accounts; assigning additional site administrators](#) as necessary.
- [Managing properties and permissions](#) for laboratory staff accounts
  - Only appropriate laboratory personnel should be allowed access.
  - Staff that are no longer employed at your site should be removed
- Reviewing users on a regular basis and removing inappropriate access
- Contacting IQMH with support questions



## Navigating within QView™

### Multi-Site Access from one login

Individuals with responsibilities in multiple laboratories may have access to multiple sites from their single login account. Select “**Sites**” from the top menu bar to review and switch between sites listed.

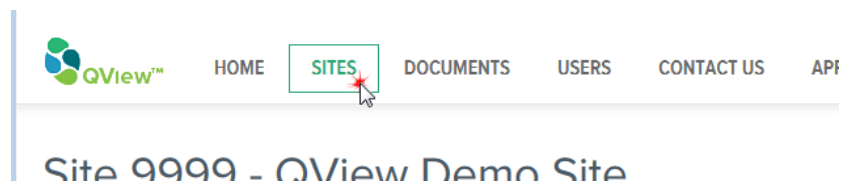


The Site listed with the house icon is your default login site. If you wish to change your default login site first you must switch to the desired site, then click on Sites again and select **Make default**.



## Adding New Users in QView™

1. For a new participating site the initial login information is provided to the primary contact person provided in the enrolment. In QView™, this person is considered as “Super Site Administrator” (SSA) or “Site Administrator” (SA) and can give other individuals access to QView™.
2. **If you are a Site Administrator with Multi-site access, please ensure that you are in the correct Site before adding a new user. Click on “Sites” in the menu bar across the top of the screen to switch between sites.**



To add user access you will create an account for them using their email address, so ensure it is entered correctly. You will set their permissions and assign them a password. To complete the process this procedure can send an email to them with their username and password.

For full instructions on adding new users see [Appendix B](#)



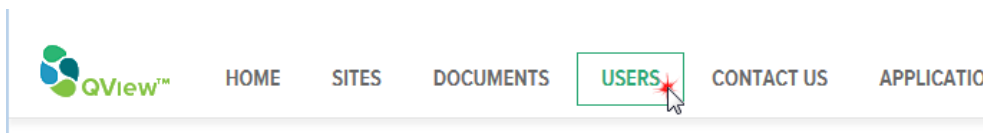
## Updating User Information

If you are a QView™ Super Site Administrator (SSA) or Site Administrator (SA) you can manage the properties and permissions of other user accounts by accessing their profiles.

**An SSA can modify the properties of other SA or member accounts.**

**An SA can modify the properties of member accounts.**

Start by clicking “**Users**” in the menu bar.



You will see the list of QView™ accounts with access to the site, their email address and type of account.

To modify a user’s properties or permissions click on the **Display Name** for that user in the Users list to get into their profile:

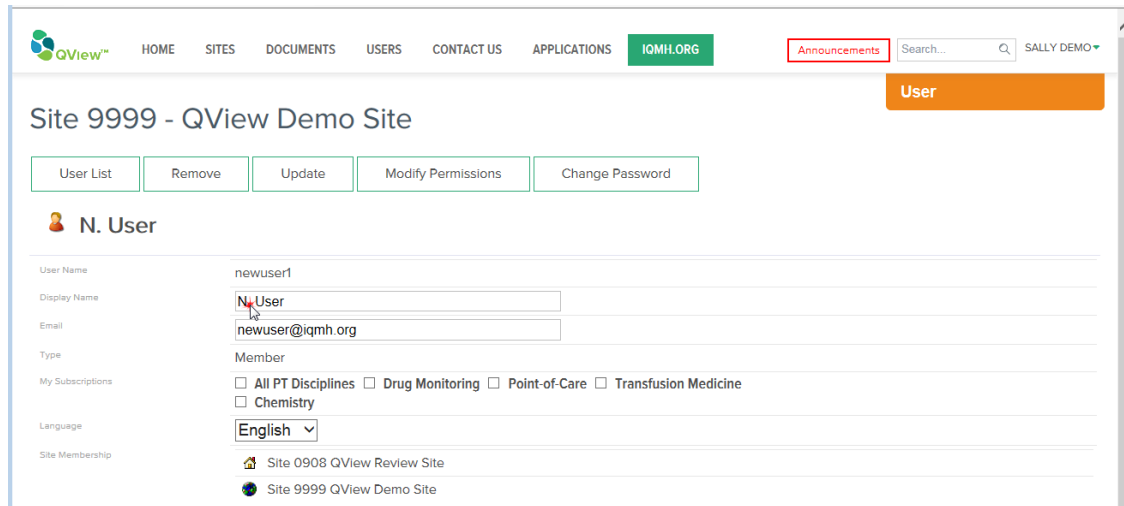
Site 9999 - QView Demo Site

Users

New User List users by site Subscriptions

Manage Users and Permissions

Display Name-	User Name	Email	Type
Mary Joe Smith	Mary1	Mary@iqmh.org	Member
N. User	newuser1	newuser@iqmh.org	Member
Sally Demo	sallyDemo	shelly@iqmh.org	Site Administrator
Shelly Rowe	shelly	srowe@iqmh.org	Super Site Administrator
TestUser	TestUser	testuser@qmpls.org	Member

The screenshot shows the QView user profile page for 'N. User'. The page has a navigation bar at the top with links: HOME, SITES, DOCUMENTS, USERS, CONTACT US, APPLICATIONS, and IQMH.ORG. There is a search bar and a 'SALLY DEMO' dropdown. Below the navigation bar, the page title is 'Site 9999 - QView Demo Site'. On the right, there is an orange 'User' button. Below the title, there are five buttons: 'User List', 'Remove', 'Update', 'Modify Permissions', and 'Change Password'. The user profile section shows the following details:

- User Name: newuser1
- Display Name: N. User
- Email: newuser@iqmh.org
- Type: Member
- My Subscriptions: ☐ All PT Disciplines ☐ Drug Monitoring ☐ Point-of-Care ☐ Transfusion Medicine ☐ Chemistry
- Language: English (dropdown menu)
- Site Membership:
  - Site 0908 QView Review Site
  - Site 9999 QView Demo Site

From the account profile you may have the following options:

Add or change the **Display Name** and **email** address in the appropriate box.

Manage **Subscriptions** for the account holder.

Change the user type - click '**Modify Permissions**' from the options listed on the left side of the screen.

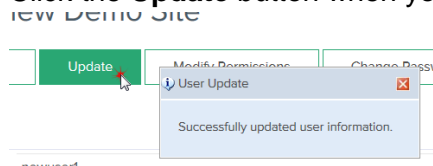
Remove (i.e. Delete) a user account from this site - click '**Remove**' from the options list.

Change the account password – click on **Change Password**. The password must be a minimum 6 characters.

Change the **language** of the web-site from English to French. Once your language has been set it will remain at that setting until changed in your profile. Note: the QView™ website is bilingual-ready however full translation in French has not been completed.

**The options will appear differently depending on your permission level.** For example, a member-level account will not have the options to manage permissions or remove a user.

Click the **Update** button when you are finished making changes.



The screenshot shows the 'Update' button being clicked. A confirmation message box appears with the text: 'User Update' and 'Successfully updated user information.'



## Modify/Manage Permissions

As SSA or SA you can change the permissions of QView™ accounts at a level below you.

**An SSA can modify the properties of other SA or member accounts.**

**An SA can modify the properties of member accounts.**

As SSA you can make member accounts into Site Administrators (SA) by selecting Yes for the Site Administrator option in the screen below.

Please note that Super Site Administrators (SSA) cannot be changed to another type or deleted. Contact IQMH to make changes related to SSA's.

Access the following	Role
Announcements	Reader
Site Administrator	No
Documents	Writer
Forms	Write All
Method Codes Maintenance	Write
Reports	Read
PT Performance Query	None

**Default Permissions**  
As new functionality becomes available to QView, existing users will need to be granted appropriate access permissions. The system will assign them permissions by default based on the this selection. Please choose an appropriate option.

☐ None, or lowest level of access to new functionality.  
☒ Grant minimum access level e.g. reader, reviewer  
☐ Grant maximum access level e.g. writer, contributor

Cancel Update



## Chapter 2 – Submitting PT Survey Results

PT survey results are submitted using electronic forms called **Analysis Worksheets**. The information you submit in the online form will be assessed as submitted.

Ensure that you review the data collection requirements **BEFORE** completing the online form.

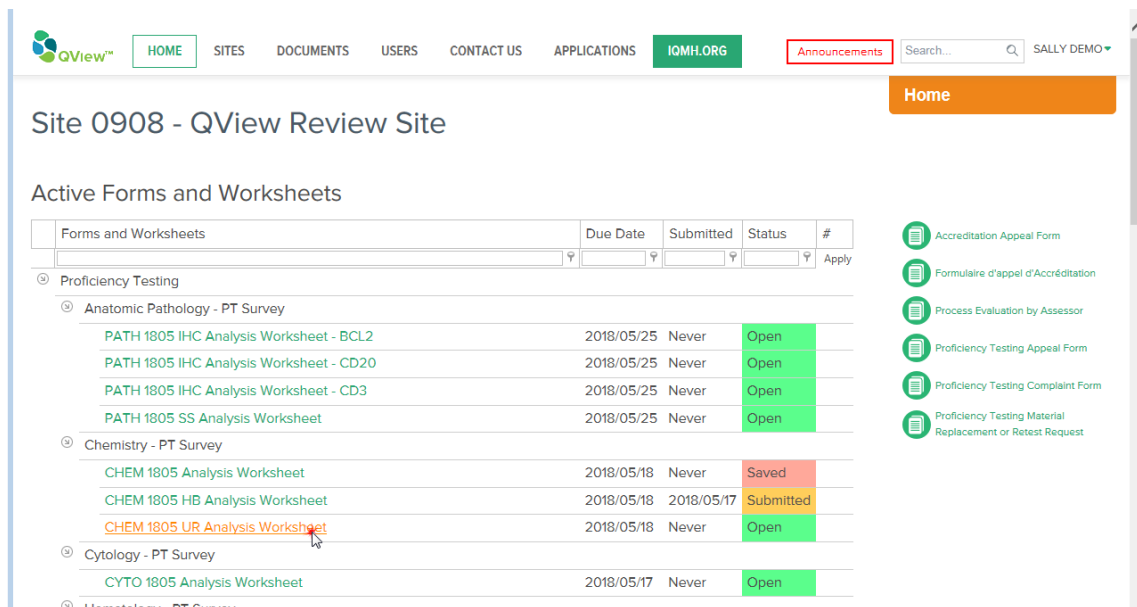
IQMH electronic forms are created in html and can be opened in any current browser.

### Locating the Form

To locate and open the survey Analysis Worksheet(s) for your laboratory you must be logged into QView™. Ensure you are in the correct site – the site name is displayed at the top of the page.

Current analysis worksheets are listed on the **Home** page. Click on **Home** in the menu bar across the top of the page. The Active Forms and Worksheets are grouped by discipline. The due date for submission of results is shown, as well as the status of each form. **Open** forms are ready for results to be entered. **Saved** forms have some data completed on the form and may be opened and updated. **Submitted** forms are complete and may not be changed.

To open a form click on the form name and it will open in a new window.



Forms and Worksheets	Due Date	Submitted	Status	#
Proficiency Testing				
Anatomic Pathology - PT Survey				
PATH 1805 IHC Analysis Worksheet - BCL2	2018/05/25	Never	Open	
PATH 1805 IHC Analysis Worksheet - CD20	2018/05/25	Never	Open	
PATH 1805 IHC Analysis Worksheet - CD3	2018/05/25	Never	Open	
PATH 1805 SS Analysis Worksheet	2018/05/25	Never	Open	
Chemistry - PT Survey				
CHEM 1805 Analysis Worksheet	2018/05/18	Never	Saved	
CHEM 1805 HB Analysis Worksheet	2018/05/18	2018/05/17	Submitted	
CHEM 1805 UR Analysis Worksheet	2018/05/18	Never	Open	
Cytology - PT Survey				
CYTO 1805 Analysis Worksheet	2018/05/17	Never	Open	
Hematology - PT Survey				



## Completing the Form

Access to forms is managed according to the forms-related permissions that have been assigned to your QView™ log-in account.

- You require “Write” permission to enter data and use the “Save” button and the “Submit” button.


Mandatory fields must be completed before the form can be saved. They are highlighted in red and if you try to Save without completing them they will be further highlighted for you.

To clear the red error popup messages click within the red box.

If you make a selection in a radio button and wish to clear it just click on the selection again and it will clear.

If you make a selection from a drop down list and subsequently wish to clear the selection, you can do that by selecting the ‘blank’ selection that is the first item in all drop down lists.

Most forms have significant validation functions to ensure proper completion of the form. Due to the diversity of browsers and settings on individual computers some of this validation may become disabled. It is the participant’s responsibility to complete the worksheet according to the instructions and provide the requested responses.

It is not necessary to complete the form in its entirety before using the Save button . You may complete the form in stages, allowing the data to be checked and corrected before the final submission. However, before you can save, you must complete all mandatory fields which are highlighted in **RED**.





## Submitting the Form

When the form is complete and final, use the Save & Submit button to complete the online data entry process.

The form will become read-only (no changes can be made) once the Submit button is used.

At midnight, Eastern Time (ET) on the due date shown on the analysis worksheet, the form will be removed from your site's QView™ Home page. (Note: at this time any results that have been SAVED but not SUBMITTED will be evaluated as if they had been submitted.)

After the due date, the form will be posted as evidence in the Documents area in your site's folder for the survey.

## Confirmation of Save or Submit

Whenever you use the Save or Submit buttons look for the confirmation message to appear. If you do not see this message the Save/Submit may not have completed properly.



### Data Received Successfully

Event Message	Your data has been successfully saved on IQMH server. (ORG)
Form	CHEM 1805 Analysis Worksheet
Reference No.	480205
Date	5/17/2018 11:14:16 AM
Site	Site 0908
By Username	Sally Demo



## Problems Saving or Submitting

If you do not see the confirmation message, reopen the form. If your data has not been saved on the form there may be a software problem on your computer. Open the form on another computer and try entering some data and Save.

We suggest in this situation that initially you only enter mandatory data until you can resolve the problems with the Save process. Once you are able to Save the form and see the confirmation message this will confirm that the form is working as expected.

If you continue to have problems contact us at [qview@iqmh.org](mailto:qview@iqmh.org) to report your problem. Please describe the worksheet you are using, the steps you have taken and any error messages you may have received.



## Chapter 3 – Creating Additional Analysis Worksheets

In a few surveys, such as BACT and POCT GL, it may be necessary to create additional analysis worksheets. Where this is appropriate there is an option displayed on the Home page beside the original analysis worksheet.

🕒	Point of Care - PT Survey	POCT 1805 GL Analysis Worksheet (1)	Add Another Form	2018/06/01
🕒	Red Cell Disorders - PT Survey	RCD 1805 HQ Analysis Worksheet		2018/05/28

When you click that option it will create a new form and open it in a new window. The new form will appear in the forms listing numbered as appropriate.

🕒	Point of Care - PT Survey	POCT 1805 GL Analysis Worksheet (1)	Add Another Form	2018/06/01
		POCT 1805 GL Analysis Worksheet (2)	Add Another Form	2018/06/01
🕒	Red Cell Disorders - PT Survey			

You can generally add as many forms as are necessary.

If you find you have added a form that you do not need leave it empty, with nothing filled in and it will be discarded when the survey closes.



## Chapter 4 – Submitting a Request for Additional Material

On receipt of testing material, participants should examine the vials/slides for leakage, breakage and temperature, etc. and inform IQMH if replacement material is required. If the testing material does not arrive in the laboratory within the expected time after the date of shipment, participants are able to track delivery through online information provided on their laboratory's home page in QView™ or by contacting IQMH directly. It is the participating laboratory's responsibility to advise IQMH of non-receipt or problems with testing material in sufficient time to allow replacement material to be sent.

**Replacement sample** is defined as a sample requested **during** the survey and must be requested by the participant as soon as possible. Reasons for replacement may include a reconstitution error, contamination, spillage, samples not received, sample received damaged, or insufficient material. Sample replacement will be shipped to the requesting facility the day following the request. (Note: Testing material [with the exception of slides] will not be shipped on a Friday). Requests for replacement material are reviewed and approved by the Consultant Technologist. IQMH only provides samples at no charge if the need arises from IQMH-related activities.

**Retest material** is defined as a sample requested **following** the due date of the survey and required for a discordant findings investigation or for further laboratory investigation (e.g., validation of new method). Shipping of retest samples will take place once per week. Electronic requests must be submitted to IQMH by noon on the 2nd Tuesday following the posting of the provisional report, the survey report or the discordant findings investigation form. Retest samples will only be shipped on the 1st or 2nd Wednesday after reports are posted. Material, handling and shipping costs will be charged to requesting laboratories. Sample availability is limited and requests are processed on a first request basis.

**Note: Requesting a retest sample is not a requirement when investigating a discordant finding unless the original sample has been compromised or considered suspect.**

Prices for PT material and handling costs are listed on the material request form.

**Participants may only request testing material using the online form and not by email or telephone.**



## LOCATING THE REPLACEMENT / RETEST REQUEST FORM

1. To locate and open the Proficiency Testing Material Replacement or Retest Request form for your laboratory you must be logged onto QView™.
2. This form is a permanent form that is available on the Home page at all times:

The screenshot shows the QView website interface. At the top, there are navigation links: HOME, SITES, DOCUMENTS, USERS, CONTACT US, APPLICATIONS, and IQMH.ORG. Below this, the page title is 'Site 0908 - QView Review Site'. The main section is 'Active Forms and Worksheets'. It contains a table with columns: Forms and Worksheets, Due Date, Submitted, Status, and #. The table lists several forms, including 'PATH 1805 IHC Analysis Worksheet - BCL2'. To the right of the table, there are three icons representing different forms: 'Proficiency Testing Material Form', 'Proficiency Testing Complaint Form', and 'Proficiency Testing Material Replacement or Retest Request'. The last icon is circled in red, indicating the form to be accessed.

3. Click on the form to open it in a new window.

## COMPLETING THE FORM

4. Complete the Survey Identification:
  - a. Click on the radio button for the applicable survey discipline (e.g. COAG).
  - b. Fill in the survey number (YYMM) and the additional characters indicating the specific sub-classification of the survey, if applicable, (e.g. 1709 DD is a Coagulation D-dimer survey conducted in 2017 – September). The survey identification must match what is shown on the analysis worksheet to ensure the correct material is sent:



### PROFICIENCY TESTING MATERIAL REPLACEMENT\* OR RETEST\*\* REQUEST

This form must be completed to request replacement\* or retest\*\* proficiency testing material. Please complete a separate form for each individual survey.

#### REQUEST DETAILS

##### 1. Survey Identification (e.g., CHEM 1705 HB):

Select the survey discipline (e.g., CHEM) and then indicate the survey number (e.g., 1705 HB) and displayed on the analysis worksheet.

<input type="radio"/> BACT	<input type="radio"/> FLOW	<input type="radio"/> PARA
<input type="radio"/> BONE	<input type="radio"/> GENE	<input type="radio"/> PATH
<input type="radio"/> CHEM	<input type="radio"/> IMGY	<input type="radio"/> POCT GL
<input checked="" type="radio"/> COAG	<input type="radio"/> LIPS	<input type="radio"/> POCT HIV
<input type="radio"/> CYTO	<input type="radio"/> MOLE	<input type="radio"/> RCD
<input type="radio"/> DRUG	<input type="radio"/> MORP	<input type="radio"/> TMED
<input type="radio"/> ENDO	<input type="radio"/> MYCO	<input type="radio"/> VIRO
<input type="radio"/> ENZY		

\* This field is required



5. Indicate the sample(s) required and the reason for the request. Ensure you are selecting the correct type/reason according to your need – serum/cells for Transfusion Medicine and replacement or retest. For Retest material you may also enter a PO number, if available. This will appear on the invoice.

2. Samples required (e.g. slide 1; or vials 2 & 3):

For Transfusion Medicine A or B please indicate: ☐ Serum only ☐ Serum & Cells ☐ Cells only

3. Reason for Replacement\* material request:

- ☐ Sample(s) not received
- ☐ Sample(s) received damaged/contaminated
- ☐ Sample(s) misplaced, dropped, spilled
- ☐ Error in reconstitution
- ☐ Insufficient material

Reason for Retest\*\* material request:

(Material & Shipping Charges apply – details on following pages)

- ☒ Retest for Discordant Finding Investigation
- ☐ Validation of method
- ☐ Retest, other reason (provide details)

PO#

6. Enter any additional details or comments and ensure all contact information is accurate prior to submitting the request form. You will be required to acknowledge that payment may be required:

4. Additional Details or Comments:

CONTACT INFORMATION

Contact Person:

IQMH Site Code:

(as shown on the analysis worksheet)

☒ I acknowledge that payment may be required (Details and prices on following pages)

What is the best way to contact you?

☒ Email

Email:

☐ Telephone

Telephone:

Ext:

Submit

7. Note that definitions of replacement and retest material are provided, and the prices for PT material are listed on the form.
8. Use the Submit button to conclude the online data entry process once the form is complete. You will receive a notification indicating the form was successfully submitted.



Institute for Quality  
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**Page 21 of 45**



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9. IQMH staff will communicate with the person identified in the submitted form regarding approval of the request and will provide the scheduled shipping date if approved.
10. Questions or concerns regarding the form and changes to the process for requesting replacement and retest material should be directed to IQMH, at 416-323-9540 or by email to [expedite@iqmh.org](mailto:expedite@iqmh.org)



## Chapter 5 – Submitting Discordant Findings Investigation Forms

Survey responses submitted by your laboratory that require action due to a discordant finding are indicated on the laboratory survey reports.

A Discordant Finding Investigation (DFI) form will be available on QView™ when you receive the notice that your survey report has been posted.

The information you submit in the online DFI form will be assessed as submitted.

Ensure that you review the data collection requirements BEFORE completing the form.

The steps for locating, completing and submitting Discordant Finding Investigation forms are the same as for the Analysis Worksheets, with the exception of the permissions required.

Access to forms is managed according to the forms-related permissions that have been assigned to your QView™ log-in account.

- You require “Write” permission to enter data and use the “Save” button.
- You require “Write All & Approve” to use the “Approve & Submit” button.

At midnight ET on the response due date shown on the DFI form, the DFI form will be removed from your lab’s QView™ Home page. (Note: at this time any results that have been SAVED but not SUBMITTED will be evaluated as if they had been submitted.)

After the due date, the DFI form will be automatically posted as evidence in the Documents area in your site’s folder for the survey.

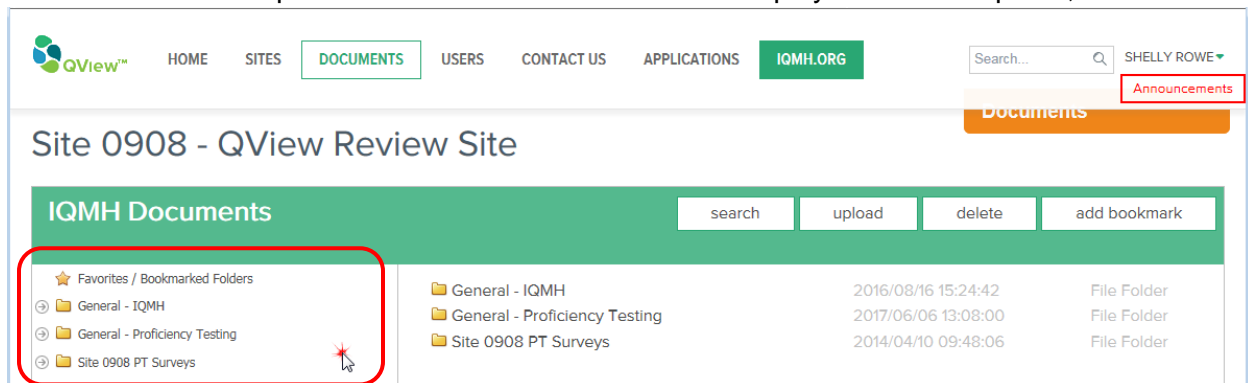




## Chapter 6 – Review Survey Reports and Other Documents

The QView™ Documents area is the repository of files and documents of a general nature and those that are specific to each participating site. To see the structure of the documents folders click on **Documents** in the navigation menu:

The folders at the top level of the **Documents** area are displayed in the left panel, as follows:



IQMH Documents				
	search	upload	delete	add bookmark
★ Favorites / Bookmarked Folders				
⊕ General - IQMH				
⊕ General - Proficiency Testing				
⊕ Site 0908 PT Surveys				
General - IQMH	2016/08/16 15:24:42			File Folder
General - Proficiency Testing	2017/06/06 13:08:00			File Folder
Site 0908 PT Surveys	2014/04/10 09:48:06			File Folder

(Note: the demonstration site number 0908 in the above example will be replaced with your own site number)

### General - IQMH

- General IQMH information - not site or discipline-specific
- Accessible to all participant accounts

### General – Proficiency Testing

- General PT information organized by discipline
- Contains non site-specific documents such as provisional survey reports, committee comments, program information
- Accessible to all participant accounts

### Site 0000 PT Surveys

- PT performance reports specifically related to your site (your lab site number will appear in all folder and file names)
- Organized by discipline, year and survey number
- Accessible to your site members only

If a document is general in topic, look in the General areas. If a document is lab-specific it is in the Site numbered folders.





## Folder Navigation

Navigation is simple. Traverse through the folders in the left pane. Click on the arrow beside the folder to open the folder structure in the left pane. A folder with no arrow in front of it contains documents. Click on the folder name to see the contents of the folder in the center pane.

**IQMH Documents**

Site 0908 PT Surveys ▶ Site 0908 PT Performance Summary Reports

**Favorites / Bookmarked Folders**

- General - IQMH
- General - Proficiency Testing
- Site 0908 PT Surveys
  - Site 0908 PT Performance Summary Reports**
  - Site 0908 Chemistry
    - Site 0908 Correspondence - Chemistry
    - Site 0908 CHEM

Performance Summary Report - 2010-2011 Lab 0908 2011

Performance Summary Report - 2015 Site 0908 2016

Performance Summary Report - 2016 Site 0908 2017

Performance Summary Report - 2017 Site 0908 2018

Click on the file name to open the document in a new window.

Performance Summary Report - 2010-2011 Lab 0908 2011

Performance Summary Report - 2015 Site 0908 2016

Performance Summary Report - 2016 Site 0908 2017

**Performance Summary Report - 2017 Site 0908 2018**

## Recently Posted Documents

Documents and reports that were posted in QView™ within the past 2 weeks are listed on the Home page for quicker access. Click on the filename to open the document in a new window.

**Recently Posted Documents**

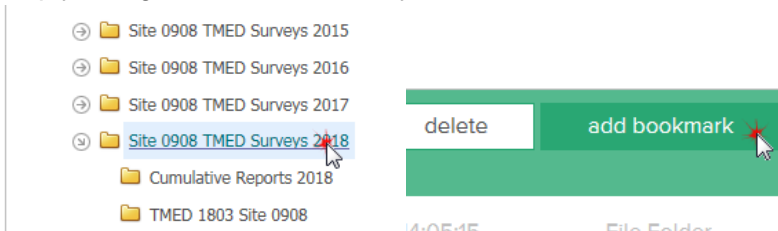
- BONE 1802
  - General Survey Report - BONE 1802 SB
- BONE 1802 Site 0908
  - Survey Report - BONE 1802 SB Site 0908
- CHEM 1804
  - General Survey Report - CHEM 1804 OX
  - General Survey Report - CHEM 1804 BG
- CHEM 1804 Site 0908
  - Survey Report - CHEM 1804 OX Site 0908
  - Survey Report - CHEM 1804 BG Site 0908
- CHEM 1805 Site 0908
  - Analysis Worksheet - CHEM 1805 Site 0908
  - Analysis Worksheet - CHEM 1805 HB Site 0908



## Creating Bookmarks or Shortcuts to your Favourite folders

If you have specific folders in the Documents area that you go to frequently you can create a bookmark to take you directly to the folder.

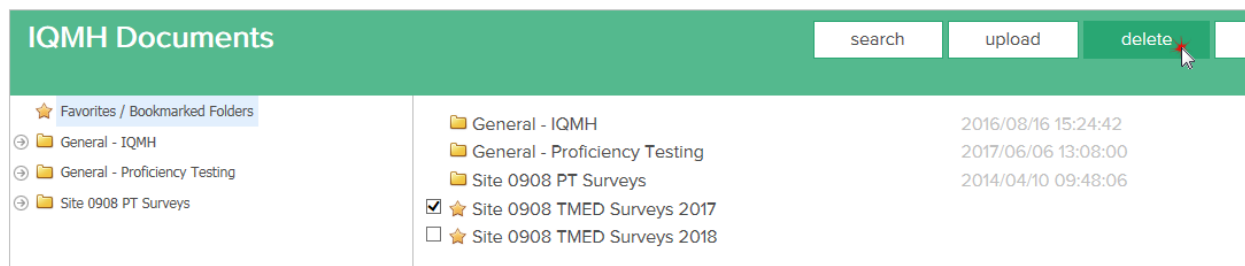
Simply navigate to the folder of your choice and click the Add Bookmark button:



Bookmarks will appear on your Home page. Click on the bookmark and it will open the documents area to that place. You can bookmark multiple folders.



To manage your bookmarks click on Favorites/Bookmarked Folders in Documents. You will see your bookmarks listed in the center pane with a box in front of them. Check the one(s) you want to remove and click the Delete button. This will remove the bookmark. It DOES NOT delete the folder.

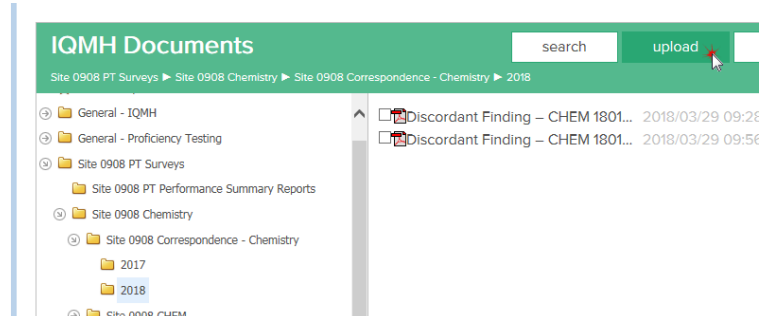




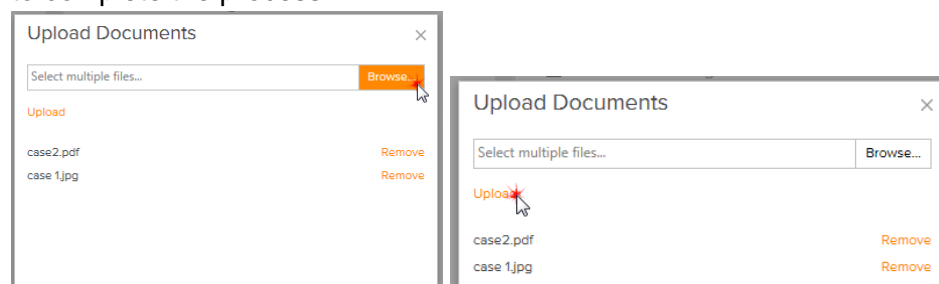
## Chapter 7 – Uploading files to QView™

You may be asked to submit documents to IQMH related to your participation in a survey. Authorized QView™ users can upload files into their own site's folders. These files will be visible to personnel at your location with access to your QView™ site, as well as to IQMH staff.

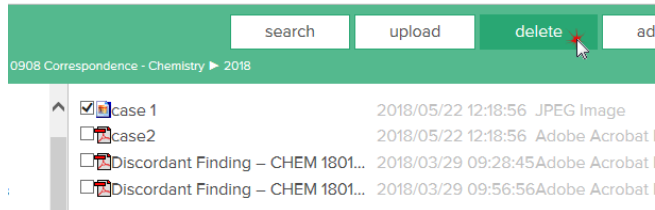
To upload a document into QView™, navigate to your appropriate site-specific PT folder in Documents and click the Upload button. Responses are to be uploaded to your laboratory's site specific QView™ folder correspondence.



Click Browse to locate your file(s). You may upload several files and as you browse and locate them they will be listed. If you make a mistake you can **remove** them from the list. Click Upload to complete the process.



The files will be uploaded and listed in the folder, in the center pane. If you wish to delete any of the uploaded files click the checkbox in front of the file and click the delete button.



**Note:** Documents posted by IQMH cannot be deleted in this manner.

## Chapter 8 – Method Code Definition

Some Proficiency Testing disciplines require that testing methods be defined prior to the survey material being shipped or prior to the results being analysed. If methods are not defined analysis cannot be performed on the lab's results for the survey. The survey Analysis Worksheet gives clear instructions for those surveys where this is required. It is the responsibility of participants to ensure that their methods are defined where necessary.

This applies to most Chemistry and Hematology surveys.

See [Appendix C](#) for detailed instructions.



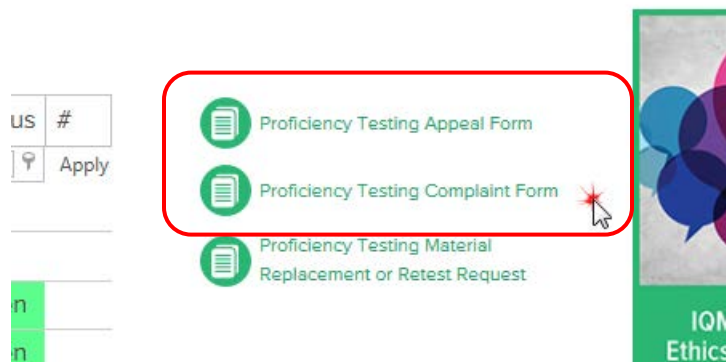
## Chapter 9 – Submission of Proficiency Testing Appeals and Complaints

An **appeal** is considered to be a formal request to change a performance assessment decision, e.g. PT survey score or action code.

A **complaint** is considered to be an expression of dissatisfaction with a PT product or service.

Online forms are available to address both of these issues.

These forms are permanent forms and are available on the Home page at all times:





## Chapter 10 – Contacting IQMH or Your Site Administrator

You can use the 'Contact Us' area to email your site administrator regarding QView™ access or other site-specific questions.

IQMH also welcomes your feedback questions. Please contact us by filling in the form and clicking 'Submit'.

QView™ HOME SITES DOCUMENTS USERS **CONTACT US** APPLICATIONS IQMH.ORG

### Site 9999 - QView Demo Site

Need help? Please contact your site administrator or IQMH by filling out the following form

From (name): Sally Demo

To: ☒ Shelly Rowe ☒ IQMH

Subject:

Message:



## Chapter 11 – Frequently Asked Questions - QView™ Electronic Forms

### **Q1: What are the minimum system requirements for me to use QView™ web-based forms?**

A1: The following checklist outlines the requirements:

<b>1</b>	<b>“Write” permission for forms in QView™?</b>  “Write” permission for forms is necessary to fill in a form and “Save” or “Save & Submit” data. Your permissions may be set to “Read Only” so you cannot enter any data, or “None” which means you won’t be able to see any forms. Your permissions are managed by a QView™ Site Administrator at your laboratory – click on Users in the top menu bar to see who is a Site Administrator.	
<b>2</b>	<b>“Write &amp; Approve” permissions for forms in QView™?</b>  Some forms have an “Approve & Submit” button to submit data. This button requires an extra level of permission. Your permissions are managed by a QView™ Site Administrator at your laboratory.	
<b>3</b>	<b>A modern browser.</b>  The forms are written in html and have been tested on a number of browsers including IE11+, MS Edge, Google Chrome, Mozilla Firefox and Safari. If you have an older browser that does not support the functionality in the form you will be advised that you must update your browser or try another one.	



***Q2: When I click the Submit button I get a message that I don't have permission to submit. How can I change that?***

A2: A QView™ Site Administrator or Super Site Administrator is the only one at your site who can change the permissions assigned to your QView™ account. Click on Users in the top menu bar to see a list of user accounts and which ones are Site Administrators.

The permissions levels for accessing forms are:

**None** – you won't see the forms at all.

**Read All** – you can see the form in the list of forms, but you cannot open the form or fill it in.

**Write All** – you can fill out the form and click the “**Save**” or “**Submit**” buttons.

**Write All & Approve** –you can fill out the form and click the “**Save**” or “**Submit**” or “**Approve & Submit**” buttons

***Q3: I don't see any forms when I log into QView™. What's wrong?***

A3: Make sure you are on the Home page for the correct site. If there are no active forms at the current time there will be nothing listed.

Or your permission level for forms may be set to “None” which means you cannot see the forms at all. Your Site Administrator manages the permission levels. Click on “Users” in the top menu bar to see a list of user accounts and which ones are Site Administrators.

***Q4: I can see the list of forms when I log into QView™ but they won't open. What's wrong?***

A4: Your permission level for forms may be set to “Read” which means you can see the forms but do not have permission to complete them. Your Site Administrator manages the permission levels. Click on “Users” in the top menu bar to see a list of user accounts and which ones are Site Administrators.





**Q5: How do I return my form responses to IQMH?**

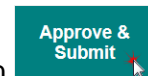
A5: Fill out all the necessary fields in the form, then find and click the **Submit** button (usually located at the end of the document). Note: the button may be labeled “**Save & Submit**” or “**Approve & Submit**” on some forms.



**Q6: There is a Save button and a Submit at the end of the form. What is the difference?**



A6: The **Save** button allows you to partially complete the form and save the information on the IQMH server. When you re-open the form the data will be displayed and you may continue completing the form.



The **Save & Submit** button and the **Approve & Submit** button both save the information on the IQMH server, and if you have the correct permission they will complete the submission process and close the form.

**Save & Submit** requires that you have at least “Write All” permission to forms.

**Approve & Submit** requires that you have “Write All & Approve” permission to forms.

**Q7: Do I have to fill in the complete form? What if I don't have all of the information yet?**

A7: The **Save** button allows you to partially complete the form, save it and complete it at a later date. However, all “Required” fields must be completed before you will be allowed to Save.

**Q8: Why are some of the form fields tagged or highlighted in red after I click the Save or Submit button?**

A8: These fields are marked as “Required”. You will need to complete these fields before the form will allow you to save or submit data to QView™.

**Q9: What happens to my survey analysis worksheets and DFI forms after the due date? Can I look at previously completed forms?**

A9: Once the form due date has passed the form is made unchangeable and it is moved into your site's documents area as evidence. See the chapter on reviewing survey reports and other documents for more guidance.



## Appendix A – Detailed Instructions for Logging in to QView™

### To log in to QView™:

1. In your internet browser go to the QView™ web portal: [www.QView.ca](http://www.QView.ca)
2. Enter your **username** and **password** and click the “Log in” button.

Username:

Password:  [Forgot your user name or password?](#)

☒ Remember me next time.

3. If you have an account but **don't know your username or password, or have forgotten it**, click on the “**Forgot your user name or password?**” link on the login page.
  - a. You will be prompted to enter your email address – ensure it is typed correctly.
  - b. An email message will be sent to you with instructions, as follows:



- c. It will provide your username.
  - d. Click on point # 1 – the entire sentence is an active link for you to click.
  - e. Follow the instructions and you will be able to log in.
4. Your site's home page will be displayed.



## If you have problems:

- Make sure you are connected to the Internet, using a modern web browser as indicated previously.
- Retype the Username and Password carefully using all lower-case letters.
- If you have followed these steps correctly and encounter technical problems logging in, please use the Contact Us link on the QView™ login page.
- If you feel that your username and password access has been compromised you should change your password.

## Change your Password to something you will remember, and update your user profile.

To access your user profile in QView™, click on your name in the upper right corner of the screen. **Please ensure the email address is correct.**

Don't forget to use the Update button to save your changes.

## Multi-Site Access from one login

You may have access to multiple sites within a QView™ region from your single login account. Select **Sites** from the top menu bar to review and switch between sites listed.

## Locating Files

Click on the **Documents** link in the menu bar across the top to access the Documents area.

## Questions about logging in?

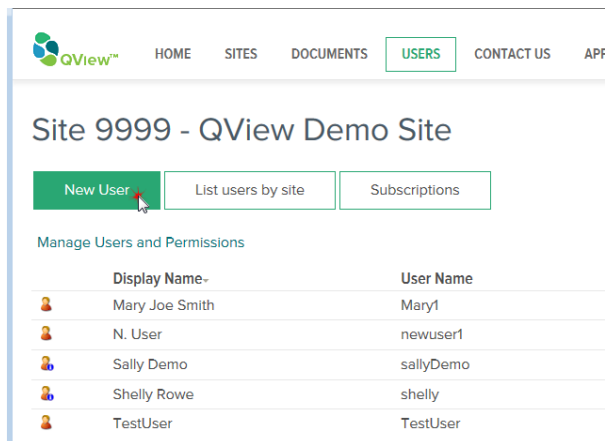
Contact [QView@iqmh.org](mailto:QView@iqmh.org) with any questions or concerns.



## Appendix B – Detailed Instructions for Adding New Users

You must be a QView™ Site Administrator to create a new user account. If you have multi-site access ensure you are in the correct site before you create the new account.

To add a new user to this site click on '**New User**' from the Users screen:



Follow these steps to add one or more users for the site in context:

### Step 1: Choose Users:

In Step 1 type in the names, or e-mail addresses, of the users you would like to create. To add multiple users at a time they must be delimited by a **semi-colon** ';'.

QView™ will use these identifiers to create the usernames that will be used to log into QView™.





For example: if you type J Bell, QView™ will create an account 'JBell'. Or, when you type an e-mail address 'john\_s@qmpls.org' the account will be john\_s.

**TIP:** As another strategy you may enter usernames you would like your users to have. For example, for John Smith you could type 'john' and then, in the next screen you can change the Display Name for john to John Smith.

**IMPORTANT:** user names must be unique across the entire QView™ system and every effort will be made to assign your users the names you choose. However, should a user name be already registered, the system will assign a numeric increment to the chosen name.



To continue from our previous example, if you type in 'john' for the user name, and a 'john' already exists in QView™, your username will be 'john2'.

### Step 1a: Choose Cross-Site Users

If you are an administrator for more than one site a list of current users at your other sites is shown:

#### Step 1a: Choose Cross-Site Users:

These users are part of other sites  
you administer. Check the users  
you'd like to add to this site.  
Their permissions are site-specific.

	Display Name	User Name	Default Site
<input type="checkbox"/>	 B Ross	brittnee	QC Site 0902
<input checked="" type="checkbox"/>	 Jodi Demos	JodiDemo	Site 9998

Check the users you want to add to the current site.



## Step 2: Choose Areas and Roles

Step 2: Choose Areas and Roles	Access the following	Role
Choose which areas of the application the users may access and the access role they will have.	Announcements	Reader ▾
	Documents	Writer ▾
	Forms	Write All ▾
	Method Codes Maintenance	Write ▾
	Reports	Read ▾
	PT Performance Query	None ▾

Currently there are several Areas of Access that can be managed:

**Announcements:** Permits read access to the Announcements Area of your lab's QView™ site.  
Options are: Reader or None.

**Site Administrator:** Grants the role of Site Administrator to the user account. Allows this user to Add, delete and update "member" accounts, including their permissions.  
Options are: Yes or No.

**Documents:** Provides the user account with read access to public and site-specific documents.  
Options are: Reader or None.

**Forms:** Provides the user account with access to online forms.  
Options are: **None** – no ability to see or use the forms; **Read All (Listing)** – can see the list of forms but cannot open them; **Write All** – can open, enter data and Save or Submit the form; **Write All & Approve** – can open, enter data and Save, Approve & Submit the DFI forms.

**Method Code Maintenance:** Provides the user account with access to the Method Codes Maintenance application in order to add or update the lab's testing method details.  
Options are: Write, Read or None.

**Reports:** Provides the user account with access to run any online reports.  
Options are: Read or None.



## PT Performance

**Query:** Provides the user account with access to run the PT Performance Query to extract performance data. Options are: Read or None.

### Step 3: Default Permissions

Additional areas of responsibility may become available in the near future.

As new functionality becomes available, existing QView™ users for your site will need to be granted an appropriate access level to take effect when the functionality is added. The system will assign them permissions based on the Default Permissions you select here. Options are: None, or lowest level of access; Minimum Access e.g. read only; or Maximum access e.g. Writer, submitter.

**Step 3: Default Permissions**

As new functionality becomes available to QView, existing users will need to be granted appropriate access permissions. The system will assign them permissions by default based on the this selection. Please choose an appropriate option.

☐ None, or lowest level of access to new functionality.

☒ Grant minimum access level e.g. reader, reviewer

☐ Grant maximum access level e.g. writer, contributor

When you have completed the 3 steps click 'Next':

Cancel

Next >>

You will be advised if you have provided the information required to add new users.

You can enter or correct the email address at this time for new user accounts.



## Inviting vs. Adding

If the email address you entered exists in QView™ associated with an existing username, you will have the option to **invite** this existing user to access your site using that same username. In this way they will not need a separate account to access each site – one username for multiple sites. If the username is not the one you want to add you may create a new username for them or you may ignore that user, which cancels the invitation.

The screenshot shows the QView™ user management interface. At the top, there is a navigation bar with links: HOME, SITES, DOCUMENTS, USERS, CONTACT US, APPLICATIONS, and IQMH.ORG. Below the navigation bar, the page title is "Site 9999 - QView Demo Site". There is a "User List" button. The main content area is titled "Ready to add users" and contains a note: "There is enough information to proceed with user creation. Some user types provide you with more options. Please make your choices and click the 'Next' button at the bottom of this page. Note: New user names will be determined by the system at time of creation." Below the note, there are two sections: "Brand New Users" and "Invite Users". The "Brand New Users" section has a table with columns: Username, Display Name, and Email Address. The first row shows a user with Username "J", Display Name "J Bell", and Email Address "jbell@abc.". The "Invite Users" section has a table with columns: Username, Display Name, and Email Address. The first row shows a user with Username "jsmith", Display Name "JJ Smith", and Email Address "john\_s@qmpls.org". Below the "Invite Users" table, there are three radio buttons: "Invite user to this site" (selected), "Create a brand new account", and "Ignore". At the bottom of the form, there are three buttons: "Cancel", "<< Back", and "Next >>".

**Ensure the email address is correct.** You may also update the display name if you wish.

Click Next to continue adding the users.





**For Invited Users** an email has been sent to their email address advising them that they have been invited to your site. **Their name will not appear in the list of users for your site until they accept your invitation.** They must read the email and use the link included in the message to accept the invitation. At that point they will be listed as a user at your site.

The details of the Brand New Users are displayed with the option to send an email with the details. The account has already been created. The final step is to send the confirming email.

### Site 9999 - QView Demo Site

User List

**Successfully added site users**

Added the following users to this site. You may update their display name, password, and e-mail address now or later on by going to the Users selection found in the top navigator ribbon.

Username	Display Name	Password	Email Address
JBell	John Bell	adfe79i	jbell@abc.com

☒ Notify new users of their new account?  
☒ Include password in the e-mail message?

Complete User Creation

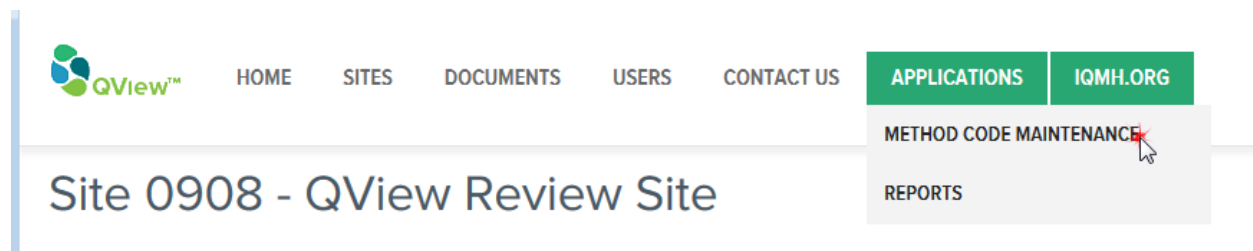
Click the 'Complete User Creation' button to complete the addition.

Methods used by the lab should be defined to ensure accurate assessment. In order to define your methods, log in to QView™ ([www.QView.ca](http://www.QView.ca))

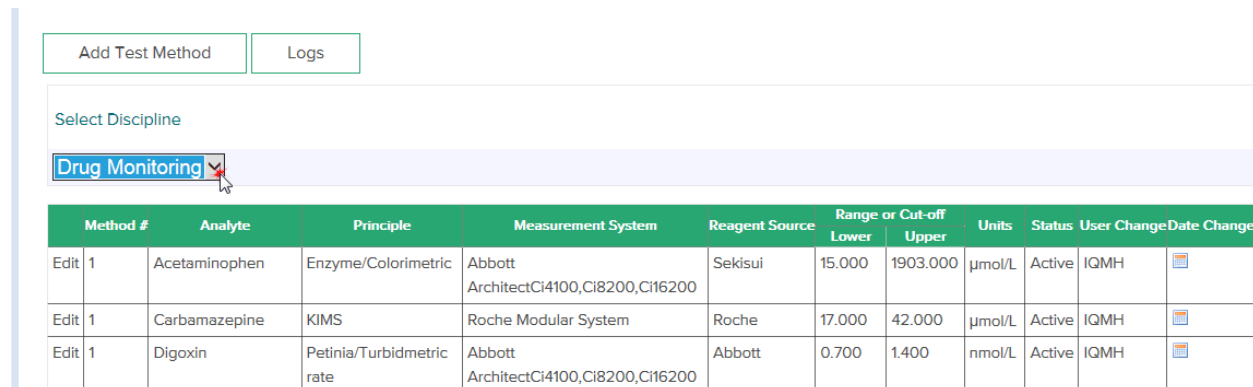


## Appendix C – Detailed Instructions for Method Code Definition

1. On the QView™ menu bar click on **Applications** and select the **Method Code Maintenance** option:



2. This will bring up the method code maintenance screen. Select the discipline in which the analyte/test is performed. Use the dropdown menu to select from the choices available. In this example Drug Monitoring has been selected. If the discipline you are looking for is not listed, it is because that the method is captured on the analysis worksheet. Contact the Consultant Technologist for that discipline if you have questions.



3. If you want to change the details of current test methods click the **Edit** button in the chart at the start of each row for each analyte/test.
4. If you want to add a new test method, i.e., if you have an additional new instrument for an analyte click on **Add Test Method**.
5. For either an update or addition the detailed test method maintenance screen is displayed:



### Site 0908 - QView Review Site

Add New PrincipleAdd New Measurement SystemAdd New Reagent SourceSaveCancel

**Edit Details**

Method #	1
Discipline	Drug Monitoring
Test	Acetaminophen
Principle	Enzyme/Colorimetric (687) ▼
Measurement System	Abbott ArchitectCi4100,Ci8200,Ci16200 (1317) ▼
Reagent Source	Sekisui (541) ▼
<b>Reference Interval : Therapeutic Range or Cut-off</b>	
Lower	15.000
Upper	1903.000
Units	µmol/L ▼

6. If the principle, measurement system or reagent source are not found on the list, you can request to have them added by selecting an **Add New ...**

### Site 0908 - QView Review Site

Add New PrincipleAdd New Measurement System

option:

### Site 0908 - QView Review Site

Add New PrincipleAdd New Measurement SystemAdd New Reagent SourceSave

**Edit Details**

Method #	1
Discipline	Drug Monitoring
Test	Fentanyl (Urine)
Principle	N/A ▼
Measurement System	Select...
Reagent Source	N/A ▼

**Message from webpage**

Please provide the name of the brand new 'Measurement System'. The current 'Measurement System' will be set to "Other" until it is accepted and updated by IQMH.

Continue?

OKCancel



And providing the details of the new component:

## SITE 0908 - QVIEW REVIEW SITE

Add New Principle   Add New Measurement System   Add New Reagent

Edit Details

Method # 1

Discipline Drug Monitoring

Test Fentanyl (Urine)

Principle N/A

Measurement System A New Instru x

Reagent Source N/A

Reference Interval : Therapeutic Range or Cut-off

7. Another feature found in the method maintenance section is Logs of all updates made to the methods.





Site 0908 - QView Review Site

Add Test Method   Logs

Site 0908 - QView Review Site

Maintenance Logs

BackAll DisciplinesDrug Monitoring Only

Action	ID	Discipline	Test Name	Principle	Instrument	Reagent	Lower	Upper	Units	User Change	Date Change
 Add New	13794	Hematology	CBC & Lkc Diff	N/A	Siemens ADVIA 70 (997)	N/A				IQMH	2015/10/29 10:56:20
 Update	10742	Chemistry	Albumin	Bromcresol Purple (79)	Abbott Aeroset (823)	Abbott (10)	0.000	000		IQMH	2014/02/28 09:00:12
 Update	10740	Chemistry	Albumin	Bromcresol Purple (79)	Abbott Aeroset (823)	Abbott (10)	0.000			IQMH	2014/02/27 17:16:21
 Update	10739	Chemistry	Albumin	Bromcresol Purple (79)	Abbott Aeroset (823)	Select...	0.000			IQMH	2014/02/27 17:13:12



## Appendix D – Revision History

Date:	Pages:	Revision Description:
2016-09-07	All	Updated login descriptions
2017-05-31	All	Described changes to forms from PDF to html – new screen shot images; new colours; browser requirements
2017-09-28	30	Expanded description of Roles and Access areas.
2018-05-31	All	Updated to reflect the redesigned QView interface and new functionality.
2018-06-05	Cover	Revised cover and added internal links to the Appendices
2018-08-08	6 20	Renumbered items 6 & 7 in the list to match the screen shot. Added PO# field