

EQATE

UK NEQAS Haematology Online

Digital Morphology CPD Module

User Guide



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FOREWORD

Barbara De la Salle – Director, UK NEQAS Haematology

Dear Participants (current and prospective!),

I am delighted to welcome you to the new UK NEQAS Haematology EQATE platform, which has been developed as a 'home' for a range of related EQA, training and education resources. The first of these is our established Digital Morphology programme, which has now been in use for over ten years and has more than 3,000 registered users worldwide. EQATE will allow the presentation of the high-quality images and clinical cases for which the programme is valued using software that we hope will be more flexible and easy to use. EQATE has been developed in collaboration with Certus Technology, who have partnered with a number of other UK NEQAS initiatives, and will offer a modular system for access to our services. Future developments are planned to include the addition of modules for the presentation of EQA materials, competency assessments and educational resources. Your continued patience during the transition and interest in our services is valued and we would be grateful for any suggestions or feedback you may have.



1. INTRODUCTION

This manual will guide you through applying for and setting up an account in the EQATE system and outlines the functionality of the EQATE Digital Morphology CPD module. The Digital Morphology programme is overseen by the experts of the UK NEQAS morphology scientific advisory group. Cases are selected for their morphology content and in context of what might be found in actual practice, and aim to cover every aspect of morphological review, over time, from the mundane to the rare. The cases are agreed and built by a team of experienced morphologists. We are always on the lookout for interesting cases, so if you have a case you think we might like to see please contact us at UK NEQAS Haematology.

UK NEQAS Haematology: <http://www.ukneqash.org>

tel: +44 (0)1923 217878

email: haem@ukneqas.org.uk

2. SYSTEM REQUIREMENTS

EQATE will run satisfactorily on most modern desktop and tablet devices with internet access. Speed of image loading and exercise handling will depend on the quality of the available broadband speed, computer memory and graphics handling capability. Touch screen devices are not supported in the current release of software.

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2.1 Supported browsers:

The EQATE software system is supplied by Certus Technology and has been developed in line with current technical standards designed to ensure browsers behave predictably. The latest versions of major browsers for use on desktop computers are substantially compatible with these standards. There are occasionally minor differences between browser behaviour, and where these differences are known and cause problems, the software makes adjustments for different browsers.

In general Certus' web delivered software can be used on the following browsers*:

- Google Chrome - Latest 'stable' release on Windows Vista and up, Linux and macOS.
- Mozilla Firefox - Latest 'stable' release on Windows Vista and up, Linux and macOS.
- Internet Explorer 11 - on Windows 7 and up
- Edge - on Windows 10**
- Apple Safari - Latest 'stable' release on macOS Sierra.

* Where specialised features are used in some applications, there may be exceptions to the list above. However, on a case by case basis, this will be addressed and explained to customers.

** Microsoft states that: "Windows 10 features Microsoft Edge, a faster, more productive way to browse the web. Microsoft recommends using Microsoft Edge as your default browser and supports Internet Explorer 11 for backward compatibility."

2.2 Recommended upgrades:

To ensure browser compatibility, the following upgrades are recommended, depending upon the operating system your computer is running:

- Windows 10 - Use Chrome, Firefox or Microsoft Edge
- Windows 7 and up - Use Chrome or Firefox, or upgrade IE to version 11
- Windows Vista or older (Note that these operating systems are no longer supported by Microsoft) - Upgrade to a newer version of Windows
- Linux - Use Chrome or Firefox
- macOS - Use Chrome, Firefox or Apple Safari

2.3 Browser 'pop-up' settings:

Users may experience problems viewing certificates due to browser permissions for 'pop-ups'. Check that your browser is set to allow pop-ups. Google Chrome for example, will give a very small warning in the very top right-hand corner of the browser if pop-ups are disabled. Go to your browser help files for instructions on how to manage your pop-up settings.

3. REGISTRATION

Registration for participation in Digital Morphology is most commonly for a laboratory or a team but it is also possible to apply for an account as an individual user.

3.1 Registration for a Laboratory or team:

You will normally register as a laboratory or as a team during the annual re-registration process for the renewal of UK NEQAS Haematology EQA services. If your application falls outside of this period please contact our offices by email for a quote, ghadmin@ukneqas.org.uk. If you are applying as a non-UK participant and your EQA services are arranged via an Agent, please ask your Agent for advice, otherwise please contact our office for assistance.

If this is a new account then on confirmation of your order you may be asked to apply to the EQATE website; go to <https://eqate.ukneqash.org> and complete the details required. Please do not apply to the website unless you are requested to do so. If your laboratory or team has been previously registered with the EQATE system then no further action is necessary, you do not need to submit an application and your account will be renewed automatically.

If you are asked to apply to the website to register then please follow the instructions below:

EQATE
UK NEQAS Haematology Online

UK NEQAS for Haematology and Transfusion

Username or email address:

Password:

[LOGIN](#) [Forgotten your password?](#)

This site allows you to maintain your account with UK NEQAS for Haematology and Transfusion, and keep track of previous schemes you have participated in.

You will also be able to register for new schemes and participate on-line.

You may continue to browse the UK NEQAS for Haematology and Transfusion web site.

+44 (0) 1923 217878 haem@ukneqas.org.uk

[Apply for an account](#)

• Click on 'Apply'

- Select the option for 'Organisation annual membership' and complete the application form – it is not necessary to provide a purchase order (PO) number
- Your application will be acknowledged by email, and the number of user licences purchased confirmed

DM Manager
EQATE Account Application

• If you have already submitted the application form and have been emailed an account confirmation key, please enter it using the Account Confirmation page.

Apply for account
Please select the account type you wish to apply for.

Organisation annual membership

Organisation membership

Apply for this membership if you would like to register a new laboratory or organisation team for an account. The annual membership fee is dependent on the number of users in your laboratory or organisation. Please contact our offices and we will arrange for a quotation for you. If your laboratory or organisation is already registered, you do not need to apply here and your membership will be renewed as a part of the main UK NEQAS Haematology re-registration process. Do not apply for this membership account if you are applying as an Individual.

Individual annual membership

Code: EQATE/DM/IndSub01

If you would like to participate as an Individual user please apply for membership here. The annual membership fee for Individual users is 60GBP plus tax (as applicable). Payment is made via PayPal using a credit card or PayPal payment, please follow the instructions. You should not need to apply for this account if you work for a laboratory or organisation which is already registered. Do not apply for this type of account if you are applying to register a laboratory or organisation. If you already have an account but it has expired, you can renew your subscription directly from your account.

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3.2 Registering as an Individual:

- If you prefer, you can apply and pay as an individual rather than as a member of a team. Individual registration is for twelve months and the price is available online at <https://eqate.uknegash.org>. Payment is available online via PayPal – you can pay with a credit card or a PayPal account. Please contact our offices if you need further information.

- Click on 'Apply'

The screenshot shows the EQATE UK NEQAS Haematology Online login and registration page. It features the EQATE logo and the text 'UK NEQAS Haematology Online'. Below the logo, there is a section for 'UK NEQAS for Haematology and Transfusion' with input fields for 'Username or email address:' and 'Password:'. To the right of these fields, there is a paragraph of text explaining the account's purpose and contact information. At the bottom, there are buttons for 'LOGIN', 'Forgotten your password?', and 'APPLY'.

- Select the option for 'Individual Annual Membership' and complete the application form

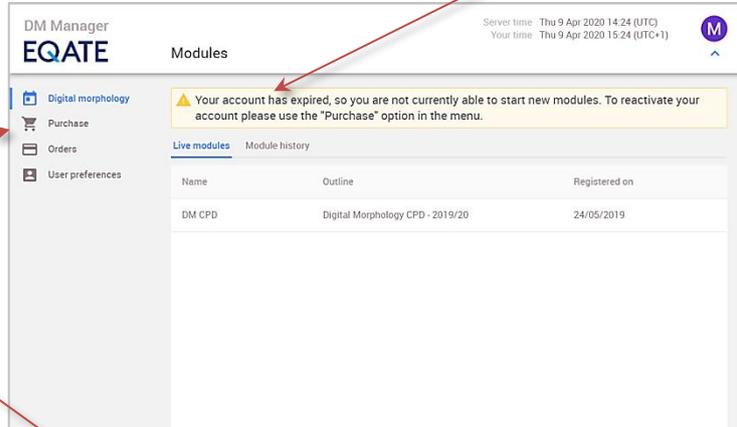
The screenshot shows the 'DM Manager EQATE Account Application' page. It has a header with 'DM Manager EQATE' and 'Account Application'. Below the header, there is a blue box with instructions: 'If you have already submitted the application form and have been emailed an account confirmation key, please enter it using the Account Confirmation page.' Below this, there is a section titled 'Apply for account' with the instruction 'Please select the account type you wish to apply for.' There are two main options: 'Organisation annual membership' and 'Individual annual membership'. The 'Individual annual membership' option is highlighted with a red arrow from the text 'Select the option for 'Individual Annual Membership''.

The screenshot shows the 'DM Manager EQATE Account Application' page for 'Individual membership'. It has a header with 'DM Manager EQATE' and 'Account Application'. Below the header, there is a section titled 'You are applying for the Individual annual membership account.' with the code 'EQATE/DM/IndSub01'. Below this, there is a section titled 'Individual membership' with instructions. Below the instructions, there is a progress bar showing 'Step 1 of 2' and 'STEP 1: PERSONAL AND CONTACT DETAILS'. Below the progress bar, there is a section titled 'Personal Details' with the instruction 'Please enter your personal details.' and a form with fields for 'First Name', 'Last Name', 'Email', 'Web Page', 'Phone Number', and 'Fax Number'. Below the 'Personal Details' section, there is a section titled 'Correspondence Address' with the instruction 'Please enter your personal contact details.' and a form with fields for 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Town/City', 'Region', 'Country', and 'ZIP/Postcode'. At the bottom, there are buttons for 'CANCEL' and 'NEXT'.

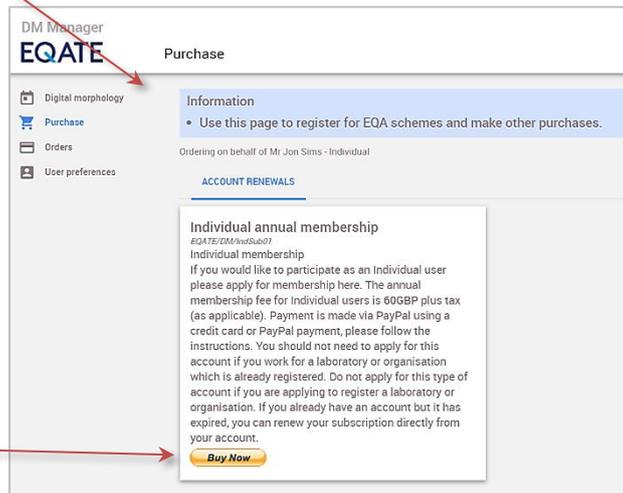
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- When you have completed the application form you will be invited to set a password and log in to your new account (page 10). Once you have logged in, your account will show that the account has expired. You will not be able to view any cases until your payment has been processed.

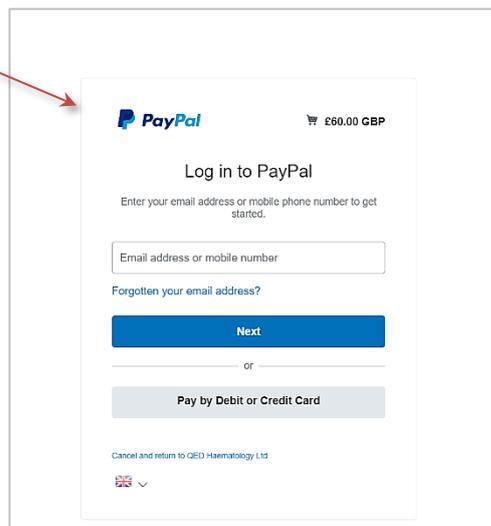
- Open the 'Purchase' tab on the left-hand menu to see the option to renew your account



- Click on 'Buy Now' You will be taken to the PayPal payment site

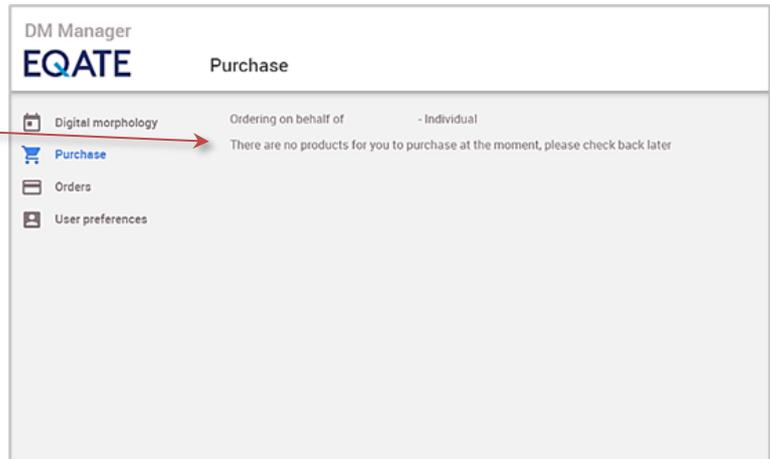


- Follow the PayPal instructions to complete your purchase



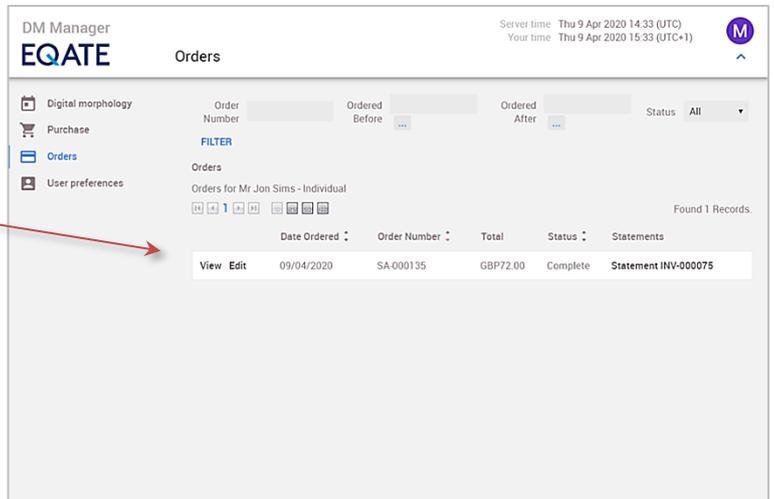
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- When your payment has been completed you will be returned to your account, the 'Purchase' tab will show there are no further products available to buy



- Log out and then log back into your account to complete the process

- Open the 'Orders' tab to see a record of your purchase



- PayPal will also send a copy of your payment to your email address

Merchant information: QED Haematology Ltd ghadmin@ukneqas.org.uk http://www.ukneqash.org 01923217878	Instructions to merchant: None provided																				
Delivery information: UK NEQAS Haematology Watford, Hertfordshire WD18 0FJ United Kingdom	Delivery method: Not specified																				
<table border="1"> <thead> <tr> <th>Description</th> <th>Unit price</th> <th>Qty</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>UK NEQAS DM Licence Item #: EQATE/DM/IndSub01</td> <td>£60.00 GBP</td> <td>1</td> <td>£60.00 GBP</td> </tr> <tr> <td colspan="3"></td> <td>Discount: -£0.00 GBP</td> </tr> <tr> <td colspan="3"></td> <td>Tax: £12.00 GBP</td> </tr> <tr> <td colspan="3"></td> <td>Total: £72.00 GBP</td> </tr> </tbody> </table>		Description	Unit price	Qty	Amount	UK NEQAS DM Licence Item #: EQATE/DM/IndSub01	£60.00 GBP	1	£60.00 GBP				Discount: -£0.00 GBP				Tax: £12.00 GBP				Total: £72.00 GBP
Description	Unit price	Qty	Amount																		
UK NEQAS DM Licence Item #: EQATE/DM/IndSub01	£60.00 GBP	1	£60.00 GBP																		
			Discount: -£0.00 GBP																		
			Tax: £12.00 GBP																		
			Total: £72.00 GBP																		
Receipt No: 2398-0917-6742-0305 Please keep this receipt number for future reference. You'll need it if you contact customer service at QED Haematology Ltd or PayPal.																					
Yours sincerely, PayPal																					

4. ACCESSING THE SYSTEM

4.1 Setting a password:

Before you can access your account you will need to set a password, go to the EQATE home web page using this link: <https://eqate.ukneqash.org> or follow the link on the computer generated email you received following your application. If you are a new user on the system you may not yet have your computer generated username, please use the email address used to register your account application as your username.

- Enter your Email address or Username
- Click on 'Forgotten your password?' and an email link will be forwarded to you

UK NEQAS for Haematology and Transfusion

Username or email address:

Password:

LOGIN Forgotten your password?

APPLY

This site allows you to maintain your account with UK NEQAS for Haematology and Transfusion, and keep track of previous schemes you have participated in. You will also be able to register for new schemes and participate on-line. You may continue to browse the UK NEQAS for Haematology and Transfusion web site. +44 (0) 1923 217878 haem@ukneqas.org.uk

Apply for an account

- Enter your email address or username to confirm and click on 'Submit'

DM Manager EQATE Don't know your password?

CERTUS TECHNOLOGY ASSOCIATED LIMITED

Don't know your password?

If you do not know the password to your account, please enter your email address or username. You will be sent an email which allows you to set your password.

Enter email address/username

Submit Remembered your password? Use reset key

- An automated email will be sent to you; select 'click here to change your password'

Password Retrieval Inbox x Join x Updates x

DO NOT REPLY <donotreply@ukneqash.org> to me 10:22 (3 minutes ago)

EQATE UK NEQAS Haematology Online

Password Requested

Dear Mr Haem Team,
You requested a new password on 09:22 03/04/2020.
Please [click here to change your password](#)

If your email provider blocks links, please navigate to the application, press 'Forgotten your password?' then press 'Use reset key'. Paste the following key into the 'Enter reset key' field: **fc226f4631ff7df533ace146cb6c66fc4**

This link will expire on 09:22 05/04/2020. If it has expired, please [click here to request a new password](#).

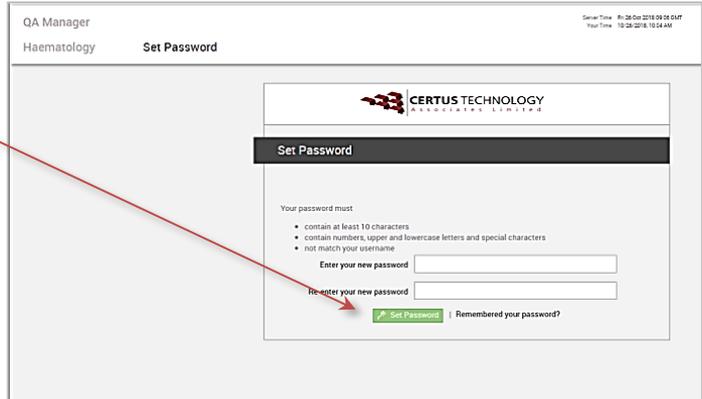
Your username is: mppht1

If you have not asked for a new password, please ignore this email.

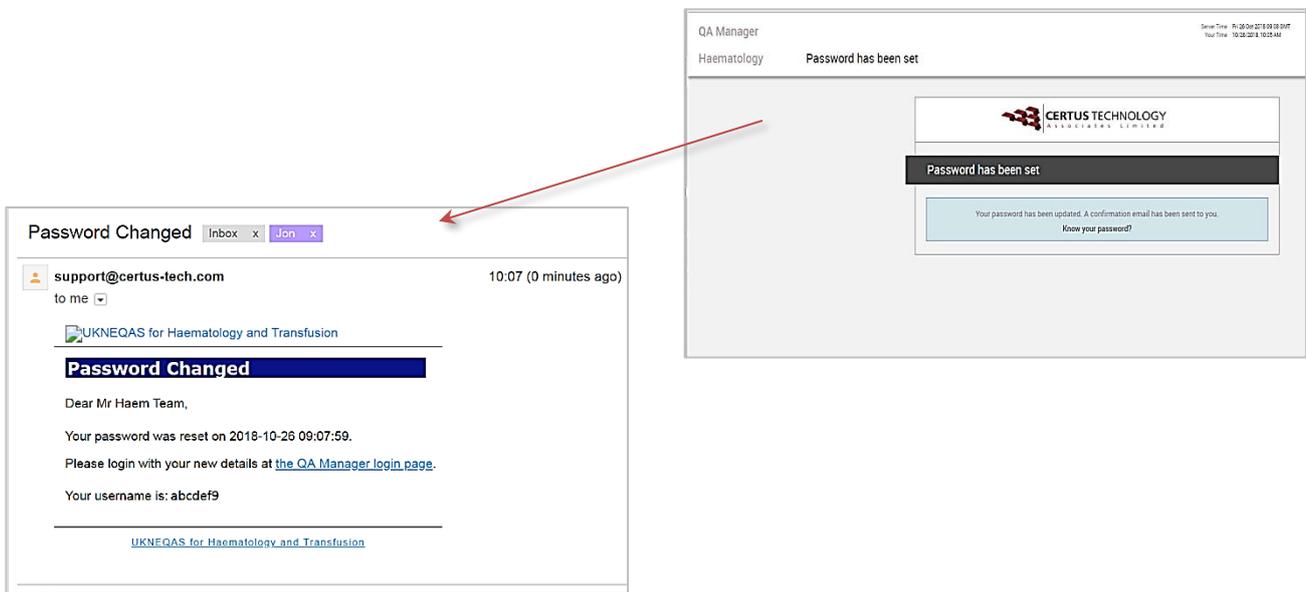
ukneqas.co.uk/haematology_and_transfusion

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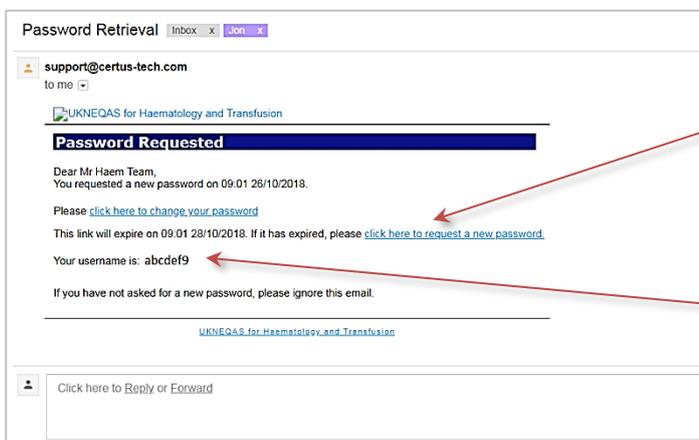
- Enter a password - confirm and click on 'Set Password'
- Be very careful setting your password, you must use a minimum of 10 characters including Upper and Lower case letters, Numbers and Special characters



- The system will acknowledge your password and confirmation will also be sent to your email address



- Go back to the EQATE home web page: <https://eqate.ukneqash.org> and login to the system with your new password and username



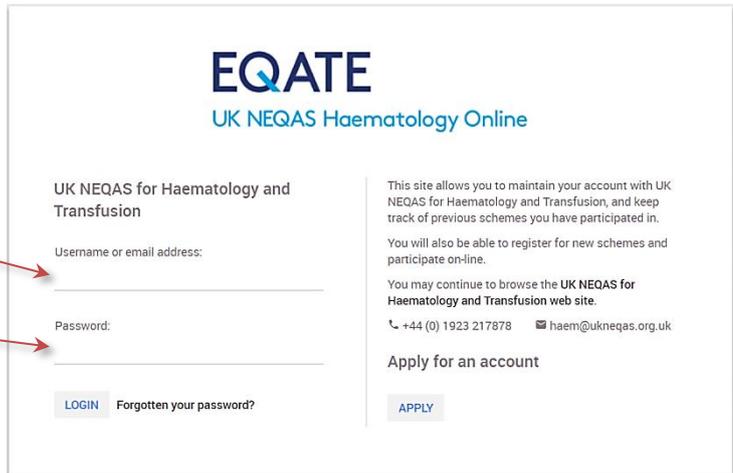
- The email link will expire if not used in time. If it has expired, click here for another password reset link to be sent
- This is your system username. You can use either your system username, your email address or an alias to sign in

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4.2 Logging in:

To log into the system go to the EQATE home web page: <https://eqate.uknegash.org>

- Enter your email address, username or alias
- Enter your password



4.3 Menu options:

Once you have successfully logged in the Digital morphology page below will load. Click on the headings in the left hand side toolbar to access the different menu options.

Click here to sign out or to view your account

Module and case information

Your purchase and order records

Your laboratory's account details

For laboratory managers

Your user account settings

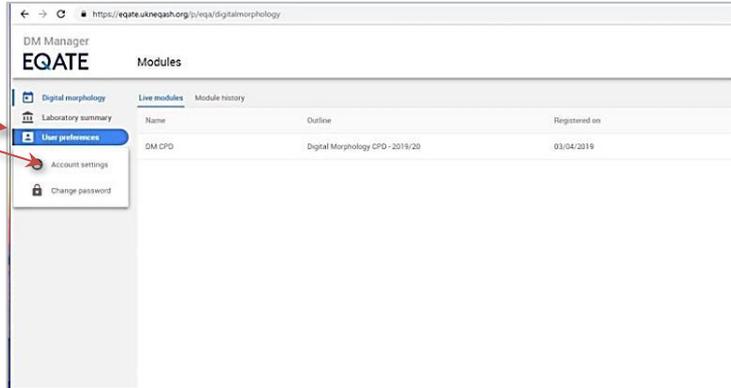
DM Manager		Modules		
EQATE		Live modules	Module history	Test modules
	Manager dashboard	Name	Outline	Registered on
	Purchase	BM CPD	Digital Morphology CPD - 2019/20	24/05/2019
	Orders			START
	Laboratory summary			
	Manage staff			
	User preferences			

5. USER PREFERENCES

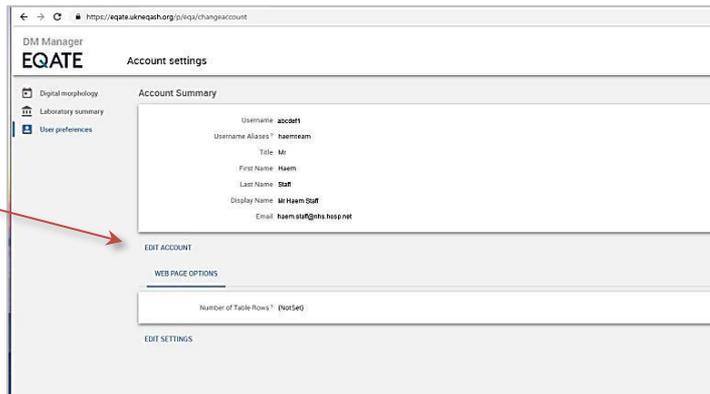
This page gives you access to your personal account details. Please keep this updated, it is particularly important to ensure your email address is correct so that we can contact you with case and system updates.

5.1 User details:

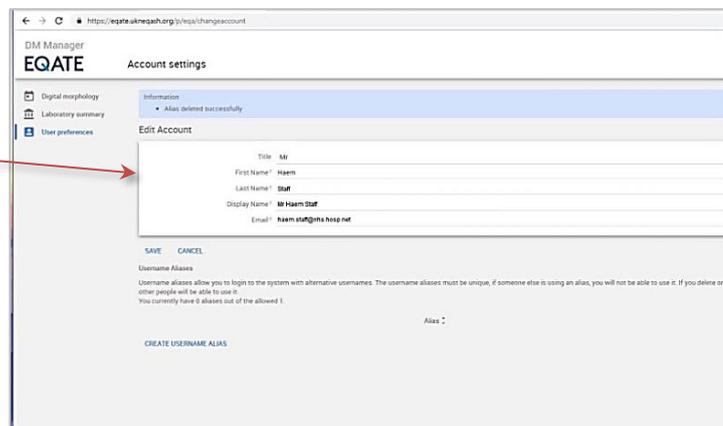
- From the home page, click on 'User preferences' in the left hand menu options and then select 'Account settings' to view your details



- To update your details, click on 'Edit Account'



- Update your details as necessary and then click on 'Save'

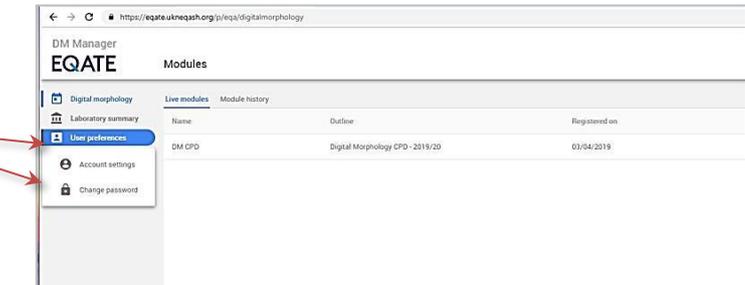


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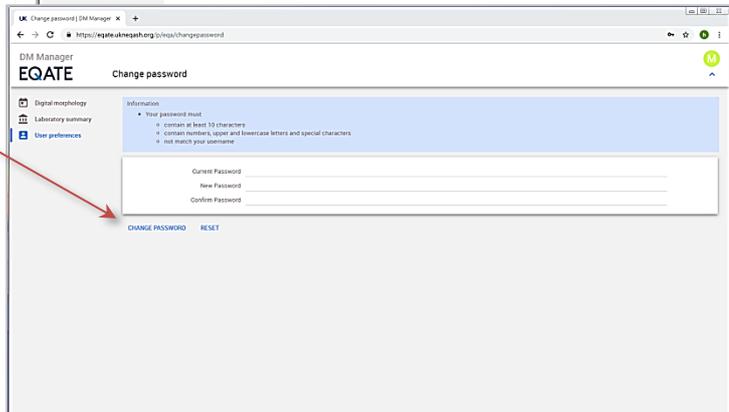
5.2 Changing your password:

We recommended that you regularly update your password.

- From the home page, click on 'User preferences' in the left hand menu options and then select 'Change password'



- Enter your new password and when you are happy click on 'Change password' to complete the change

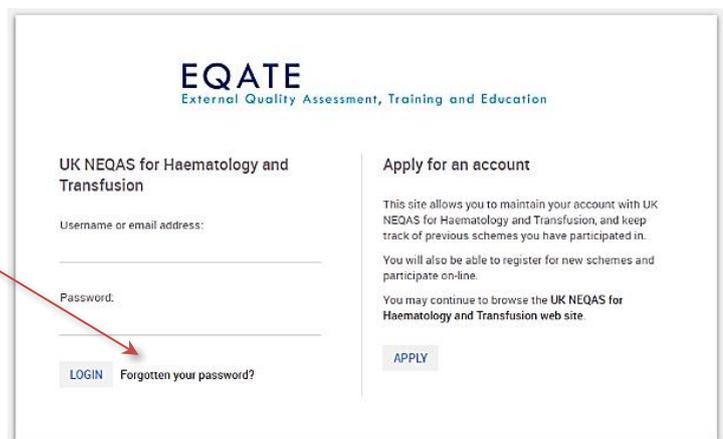


- Remember to use a minimum of 10 characters including Upper and Lower case letters, Numbers and Special characters

5.3 Forgotten your password:

If you forget your password, you can reset it at any time from the login page.

- Click on 'Forgotten your password?' and follow the instructions

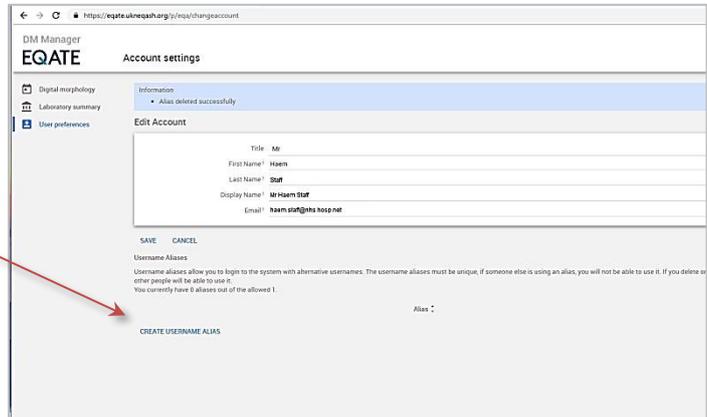


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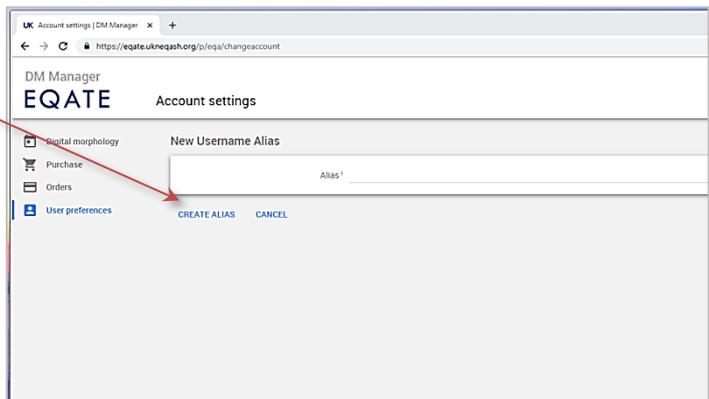
5.4 Setting an alias:

You can create an 'alias' username. Instead of using your full email address to login or the computer-generated username you can use an alias for example, 'yourname'.

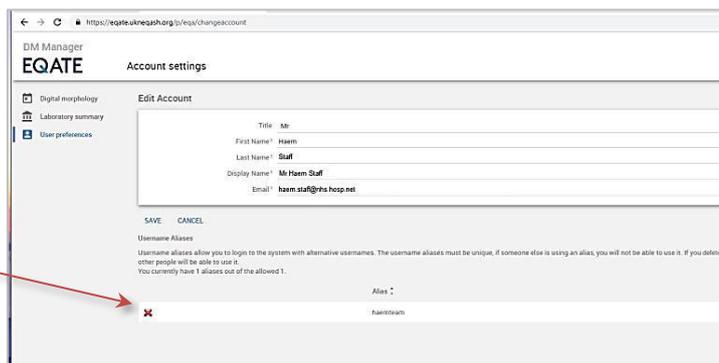
- Click on 'Create username alias'



- Enter an alias name of your choice and when you are ready click on 'Create Alias'



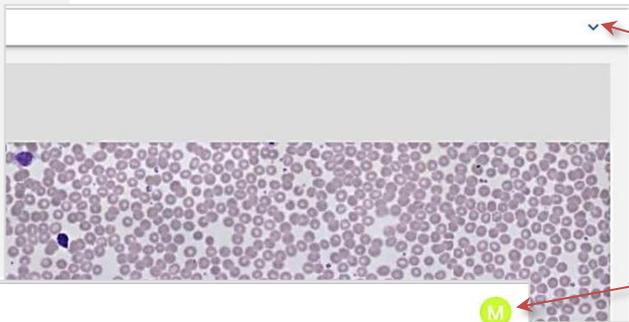
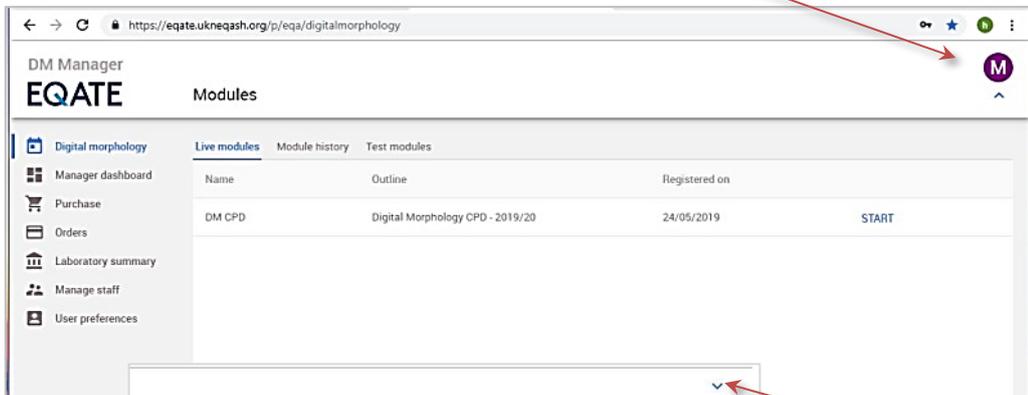
- You can only have one alias at a time. To change your alias click on the red 'X' to delete the current alias and this will allow you to set a new one



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5.5 Signing out:

- To log out, click on the coloured letter on the far-right hand side of the screen.



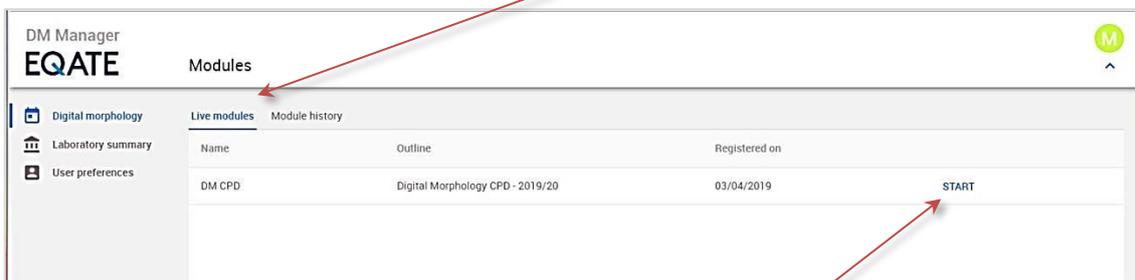
- If you are in the case page, you will first need to expand the top ribbon; click on the down caret icon
- And then click on the coloured letter
- Select 'Sign out' to quit the system
- If you are viewing a case, your work will be automatically saved

6. COMPLETING A DIGITAL MORPHOLOGY CASE

There are four stages to completing a Digital Morphology case;

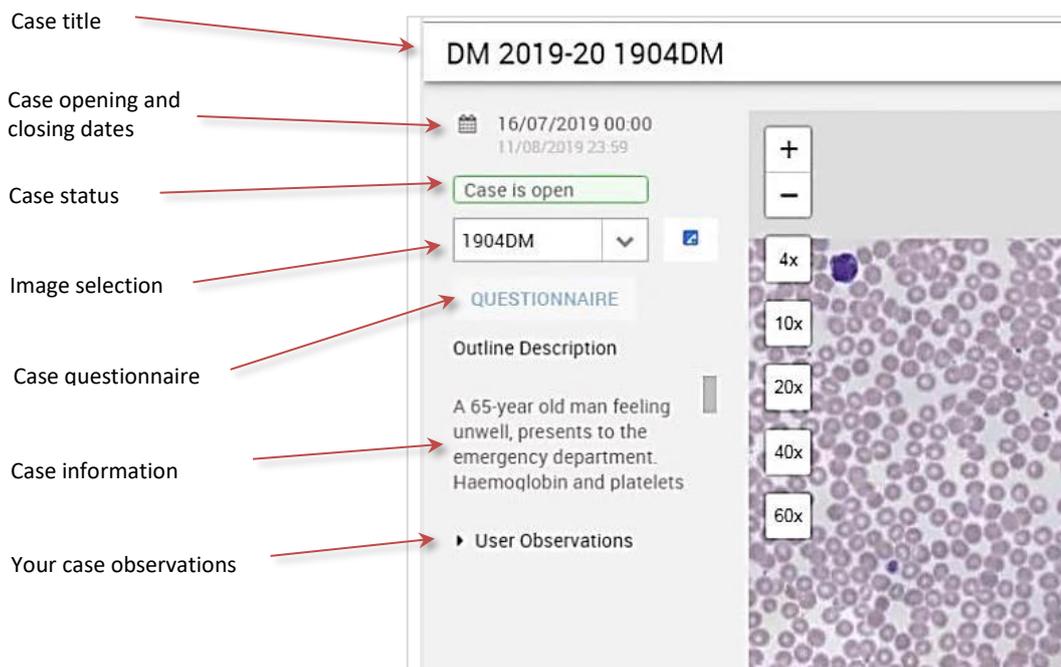
- Viewing the image and case information
- Recording your film observations
- Completing the questionnaire
- Downloading your CPD certificate

- Login into the system and you will see the screen below. Under the 'Live modules' tab you will see your available modules and cases.



- To begin a new case click on 'START'

- If there is an open and running case then the image page will open automatically

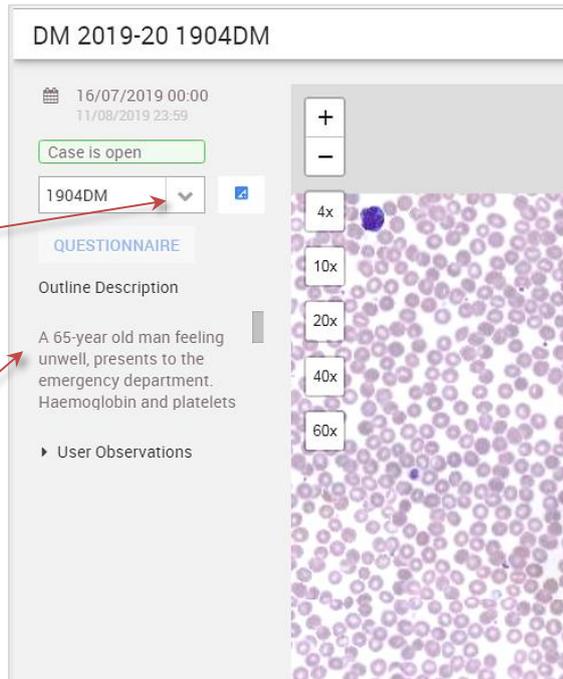


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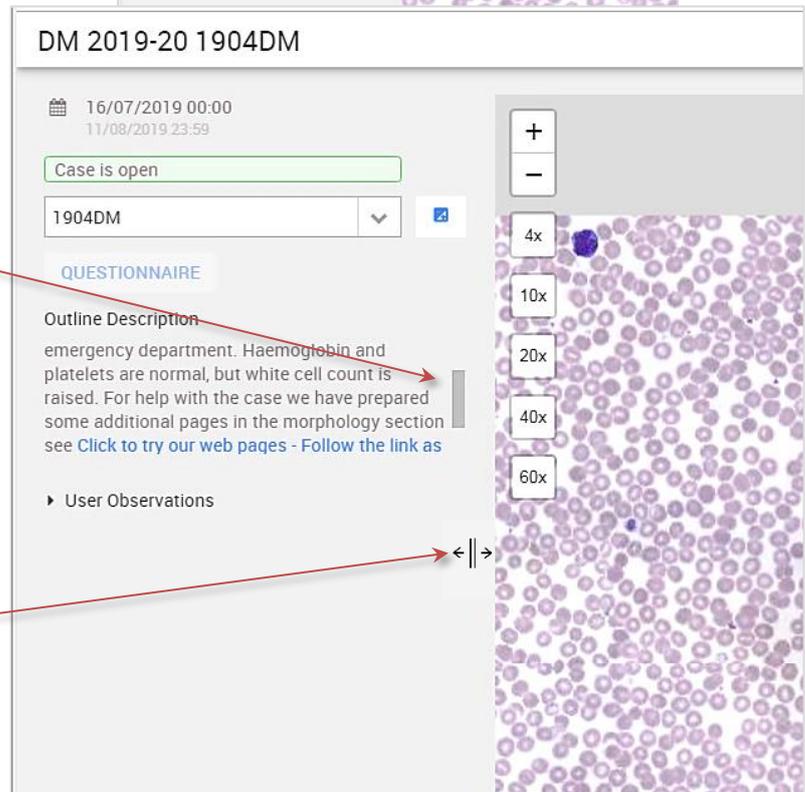
6.1 Viewing the image and case information:

Begin each case by considering the brief clinical information given and looking over the digital film image.

- Usually there will only be one image. If there are more you will be able to select which one to look at from the drop-down list
- A short outline of the case is given in the 'Outline Description'. Hyperlinks to extra information to help with the case might also be provided here



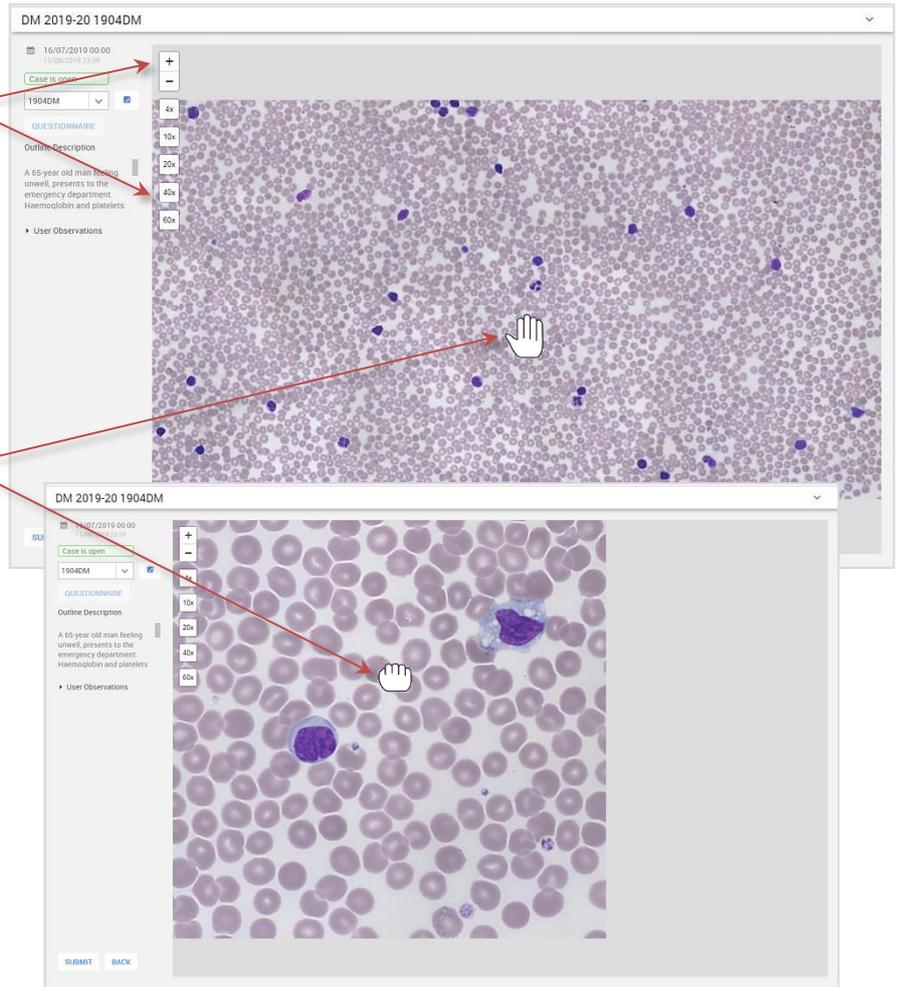
- To see more of the text, click and drag, up and down, on the bar to the side of the Outline Description
- Or, hover over the left-hand edge of the image and when the column sizing tool becomes visible, click and drag it to the right to see more text. The image area will also resize and become smaller



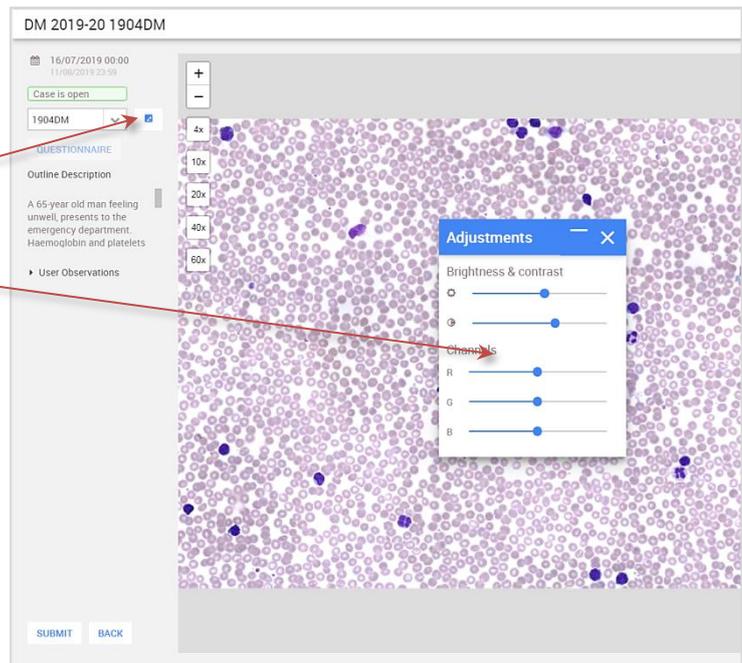
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- Use the magnification tools to zoom in and out of the image

- To pan around the image; left-click in the screen and drag to a point of interest using the grab tool



- Click on the small blue icon for the image control tool
- Click and drag the buttons on the sliders to alter the image brightness, contrast or colour balance. Click on the 'X' in the box to close it again



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6.2 Selecting your observations:

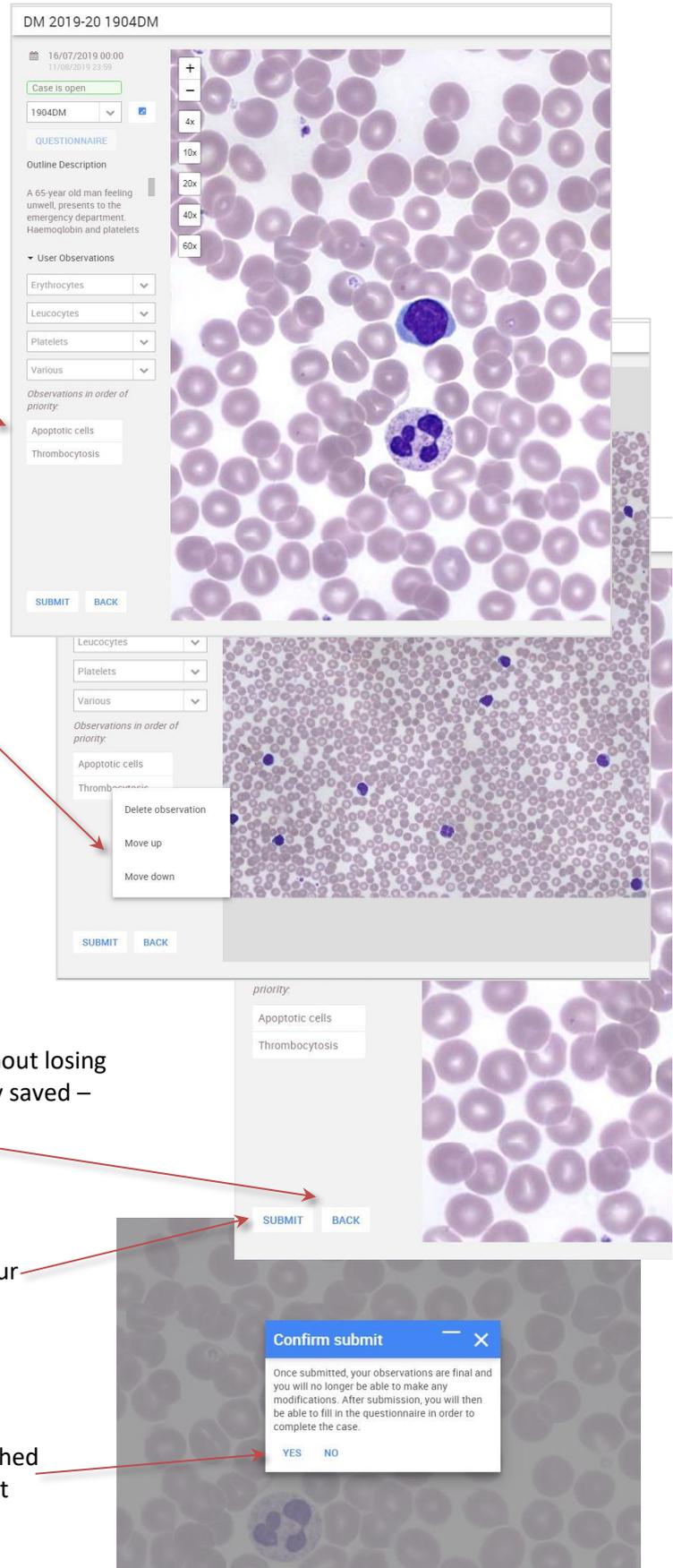
- Click on the small arrow against 'User Observations' to reveal the drop-down lists ready to select your film comments. To record your observations click on the arrow by any of the comment categories and select your comment from drop-down list



- Select your comment either by searching down the drop-down list or by typing in the first few letters of the comment

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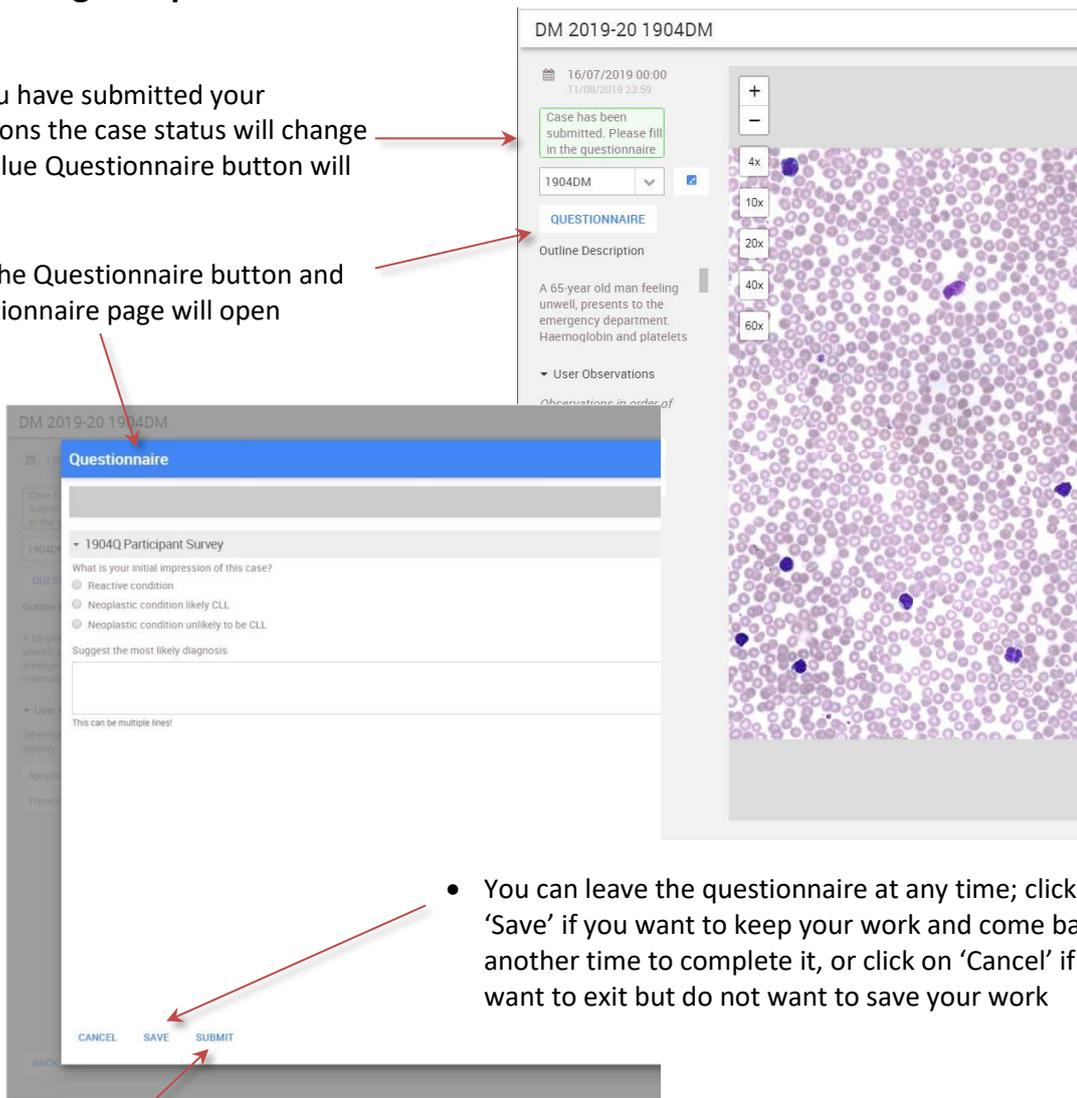
- The comments you have selected will appear just below the drop-down lists. You should try to place your comments in order of priority
- You can change the order of your comments, or remove an unwanted one. Right click on the comment you want to move or delete and a list of options will appear; click on 'Delete observation' if you want to remove the comment, 'Move up' or 'Move down' to change the order
- It is also possible to simply 'click and drag' the comments in your list to change the order
- You can leave the case page at any time without losing your work, your comments are automatically saved – click on the 'Back' button to exit
- When you have finished entering your observations click on 'Submit'
- A warning will appear – only click on 'Yes' if you are certain you have finished your observations. This action cannot be undone



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6.3 Answering the questionnaire:

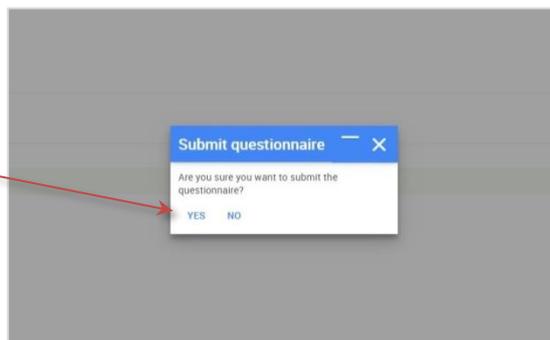
- When you have submitted your observations the case status will change and the blue Questionnaire button will unlock
- Click on the Questionnaire button and the questionnaire page will open



- You can leave the questionnaire at any time; click on 'Save' if you want to keep your work and come back another time to complete it, or click on 'Cancel' if you want to exit but do not want to save your work

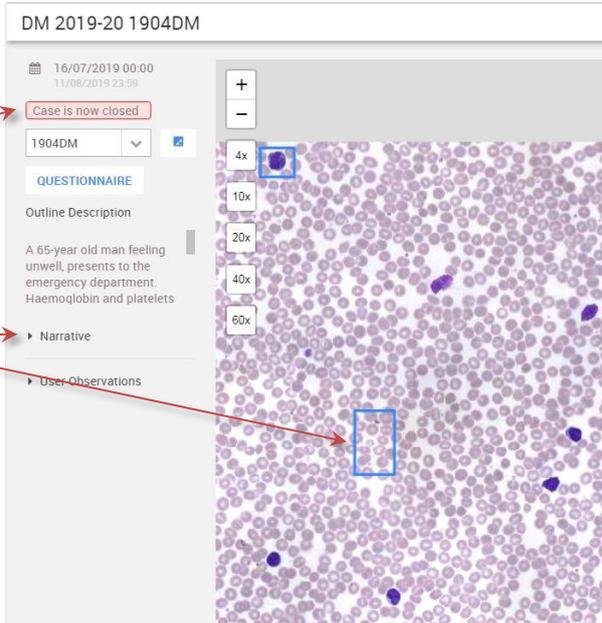
- When you have completed the questionnaire click on 'Submit' – when you submit your results the case is completed and final. You will not be able to go back to change any comments or questionnaire answers

- A warning will appear – only click on 'Yes' if you are certain you have completed the questionnaire. This action cannot be undone



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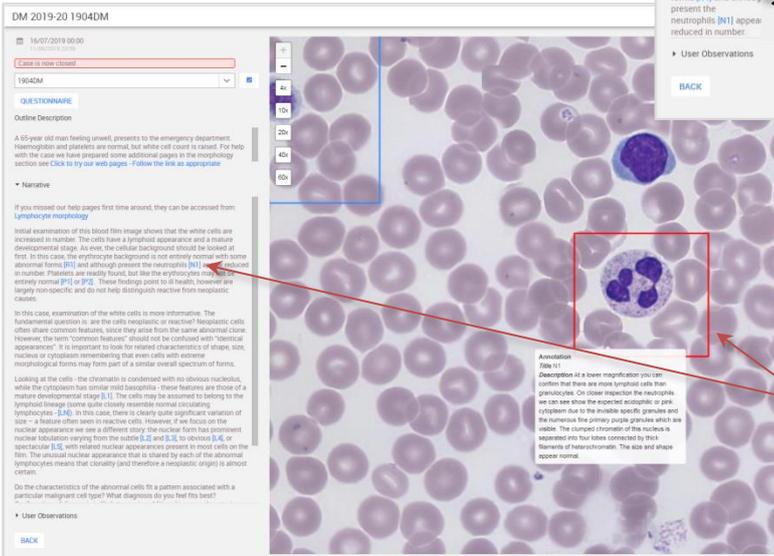
- After submitting the questionnaire, the case status will change to show that the case has closed
- The Narrative and accompanying Annotations will be revealed



- To see the Narrative text, click on the '▶'
- Use the vertical bar to scroll through the Narrative text or use the column sizing tool to enlarge the width of the text box



- Click on the Annotation links in the Narrative text to select highlighted features on the image and move your mouse over the selection box to see the annotation description



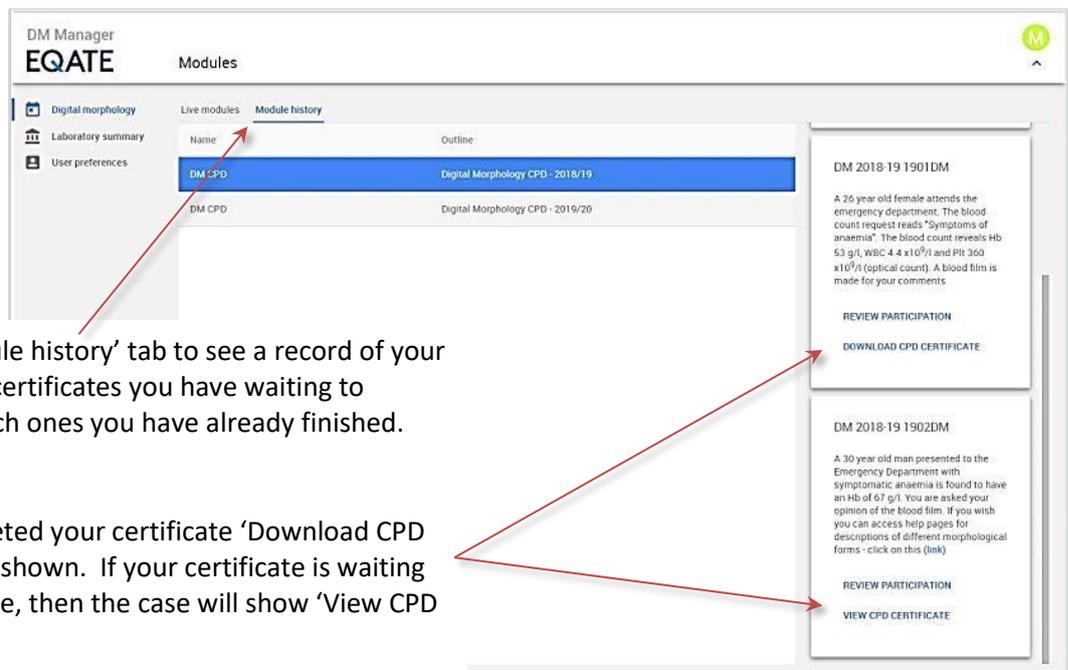
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- To view your observations again, click on the '▶' next to Narrative to close the text
- Then click on the '▶' next to User Observations to open that window up



6.4 Completing the CPD certificate:

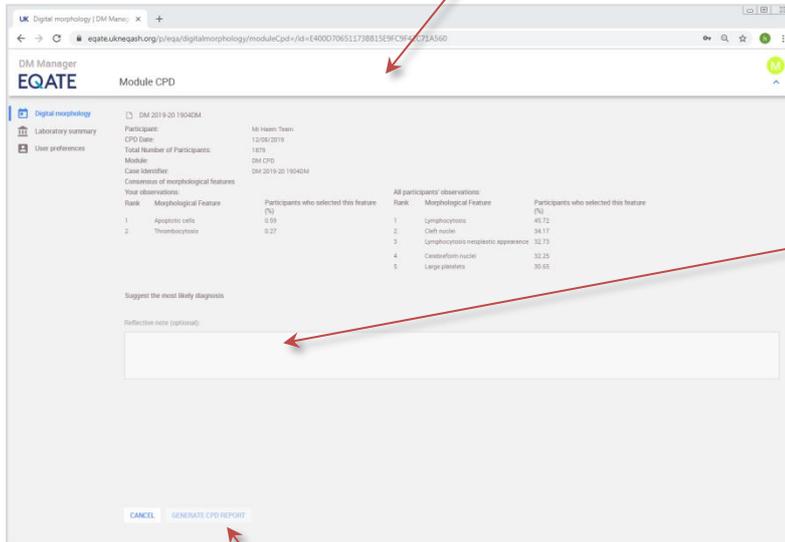
The CPD certificate, with your observations and questionnaire answers will be available to view as soon as you have completed the questionnaire. However you will not be able to complete or print out your CPD until the case has been reviewed by the digital morphology expert team and the case has been finalised.



- Click on the 'Module history' tab to see a record of your cases; which CPD certificates you have waiting to complete and which ones you have already finished.
- If you have completed your certificate 'Download CPD Certificate' will be shown. If your certificate is waiting for you to complete, then the case will show 'View CPD Certificate'.

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- Click on 'View CPD Certificate' and the CPD report screen will open

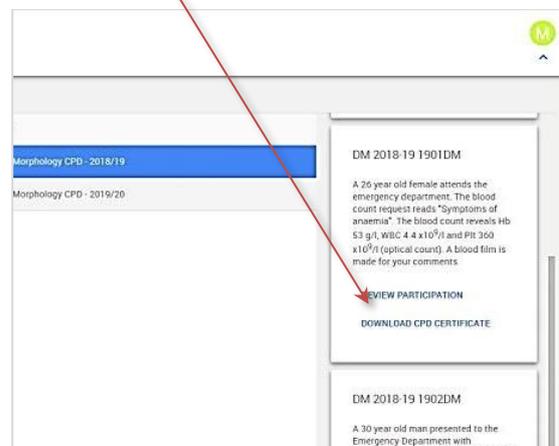


- The report screen shows information for the case and your comments, and has a free-text box for you to enter a 'reflective note'

- Click on 'Generate CPD Report' when you are satisfied with your comments and your CPD Certificate will be generated. Note that you will not be able to make any changes once the certificate has been generated. And remember that you will not be able to generate a certificate until the case has been finalised by the expert team



- Click on 'Download CPD certificate' if ever you want to view your certificate again or re-print it

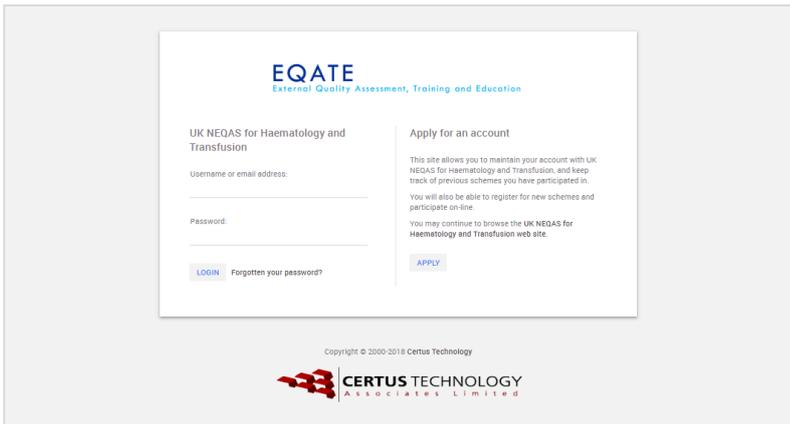


7. MANAGERS AND SUPERVISORS

7.1 Signing into the manager's account:

You need to already be registered as an administrator to access the manager's pages; go to the EQATE home web page and login with your normal login details. If you are having problems viewing the administrator/manager pages then please contact us.

<https://eqate.ukneqash.org>



Once you have successfully logged in you will be taken to the Digital morphology page below. Click on the headings in the left-hand side toolbar to access the different menu options.

Click here to sign out or to view your account

Module and case information

Your purchase and order records

Your laboratory's account details

For managers

Your user account settings

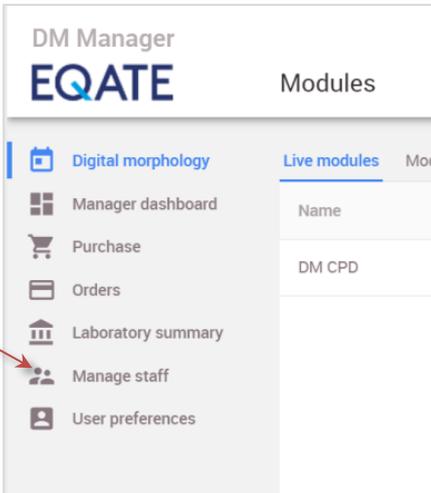
Name	Outline	Registered on
DM CPD	Digital Morphology CPD - 2019/20	24/05/2019

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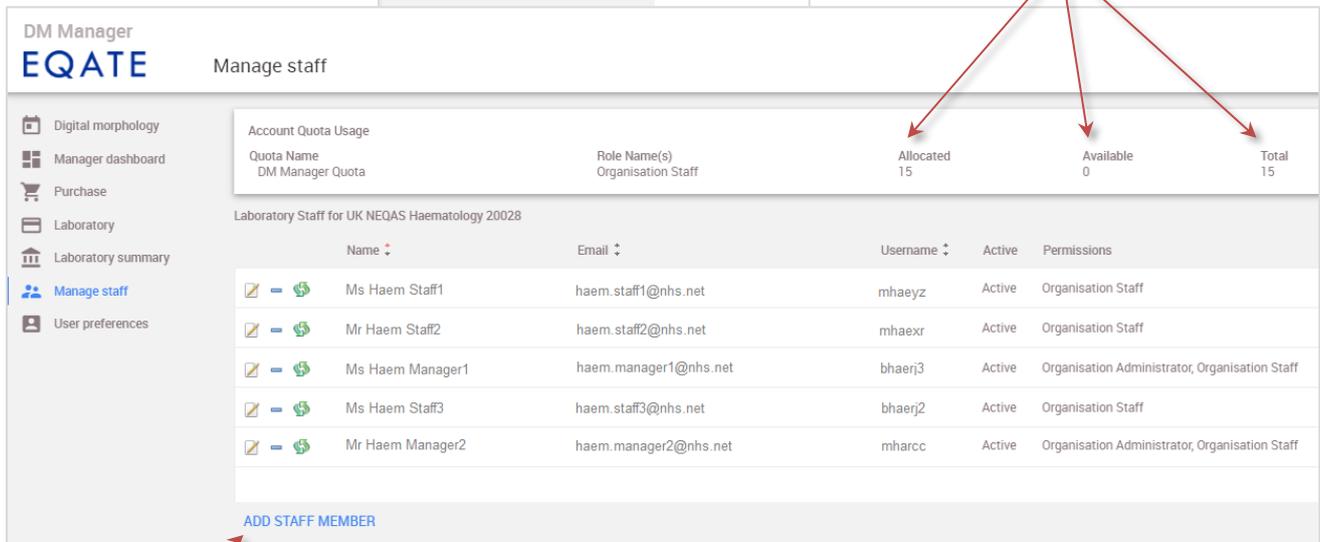
7.2 Adding users to your account:

If you are a new administrator or manager you will first need to add your team members to the system, they will not be able to access cases until you have done so. If you have a large team you might like to assign another member of your team as an administrator to help - see 1.3 below for instructions for adding extra administrators.

- Select 'Manage staff'



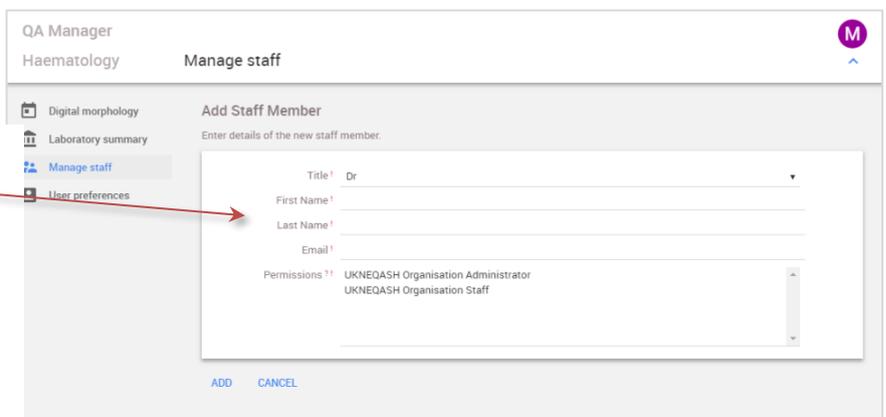
- The Manage Staff tab shows your staff details and the number of licences (quota) you have used and have available



Quota Name	Role Name(s)	Allocated	Available	Total
DM Manager Quota	Organisation Staff	15	0	15

Name	Email	Username	Active	Permissions
Ms Haem Staff1	haem.staff1@nhs.net	mhaeyz	Active	Organisation Staff
Mr Haem Staff2	haem.staff2@nhs.net	mhaexr	Active	Organisation Staff
Ms Haem Manager1	haem.manager1@nhs.net	bhaerj3	Active	Organisation Administrator, Organisation Staff
Ms Haem Staff3	haem.staff3@nhs.net	bhaerj2	Active	Organisation Staff
Mr Haem Manager2	haem.manager2@nhs.net	mharcc	Active	Organisation Administrator, Organisation Staff

- Click on 'Add staff member'
- Enter details carefully. All fields with a red exclamation mark "!" must be completed
- Note that the system will not allow the same email address to be used twice. Each user must have a unique email address



QA Manager Haematology Manage staff

Add Staff Member

Enter details of the new staff member.

Title! Dr

First Name!

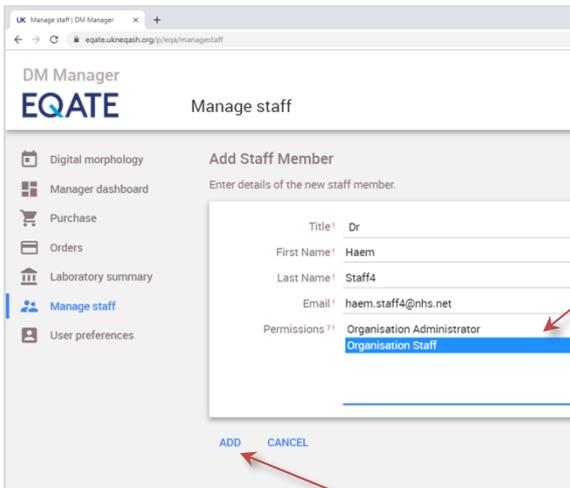
Last Name!

Email!

Permissions! UKNEQASH Organisation Administrator
UKNEQASH Organisation Staff

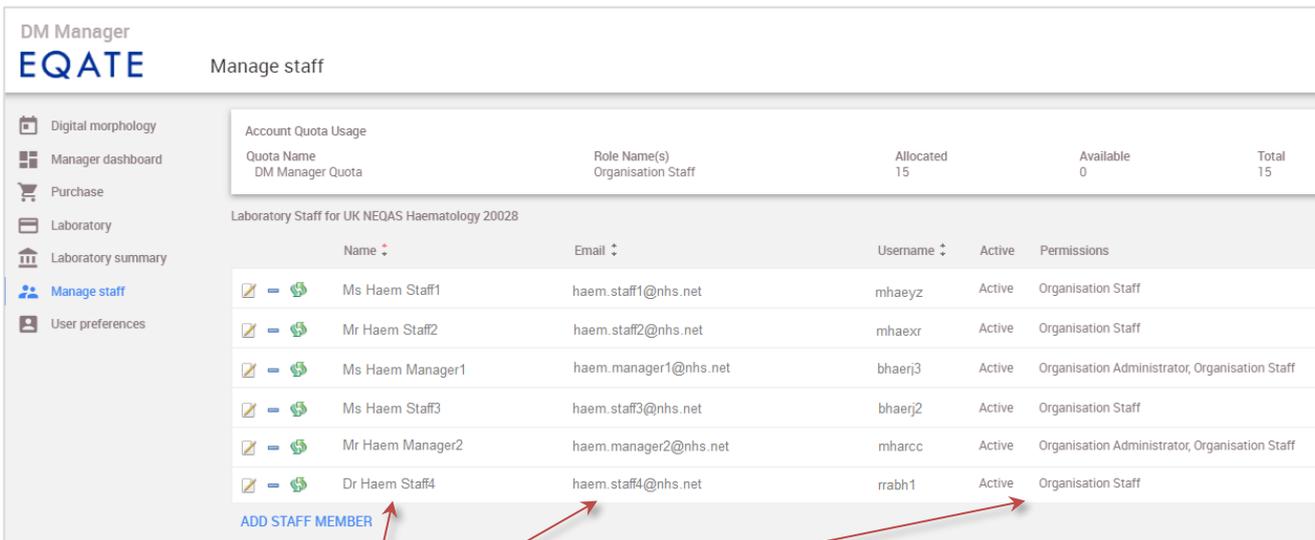
ADD CANCEL

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- Select the permission you require for your user
 - Organisation Staff – allows users to participate in cases
 - Organisation Administrator – gives access to the Admin/Lab manager functions

- And then click on 'Add' to complete the entry or 'Cancel' to exit



- The system will return to the 'Manage staff' page and you will see the person you have just added at the bottom of the list. Check that their permission/s have been correctly assigned and that their email address is correct

- Note that assigning 'Organisation Staff' to a user will use one licence. The 'Organisation Administrator' permission does not take a licence.
- A password reset notification email will be sent to the member of staff – they should then follow the instructions in section 4. 'Accessing the system'. This only happens once when you first register a team member. Any alterations after that will not cause any further notifications to be posted from the system, so for example if there was an error in their email address on setup, the original notification will have posted to that address but correcting their email address will not cause another to be sent. Your team member should go direct to the website, <https://eqate.ukneqash.org>, to login and complete the set-up of their account.

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- There are 3 icons against the drop-down list of staff names and accounts



used to edit the user's account details (change of password must be done either within the user's account – 'Change Preferences' or from the front page login). If you want to assign a second person as Administrator or change your role as Administrator you can do this here.



used to remove a user account. USE WITH GREAT CAUTION this sets the user account to 'expired'. The user's account will no longer appear on your staff list and the licence is then released and can be reused for other team members. The expired or removed user account is not lost and the owner of that account will be able to renew their account if they wish.



used to change the Primary account holder. The account holder can be the Laboratory manager or any authorised person chosen to administer the account. USE WITH GREAT CAUTION – there must always be an identified Primary account holder. The Primary account holder will be the person contacted by the scheme regarding any major changes, subscription details and registration.

7.3 Assigning Administrator permissions:

- Organisation managers can view and manage their teams but cannot view cases. In order to participate in cases they also need the role of 'Organisation Staff'. Assigning an 'Organisation Staff' role will take a user licence.
- Go to the account details under 'Manage staff' then click on the 'Edit' icon (to the left-hand side of their names). User role/s are highlighted in blue.

- Press and hold down 'CTRL' or 'Shift' and click on 'Organisation manager' and 'Organisation Staff' to highlight both roles. (You can also do this when adding a new user)

- Click on 'Update' to complete the change. You will see the updated roles on the front 'Manage Staff' page

- The EQATE system allows for multiple Administrators or managers to be assigned. Edit each user's account as described above, to set the permissions required.

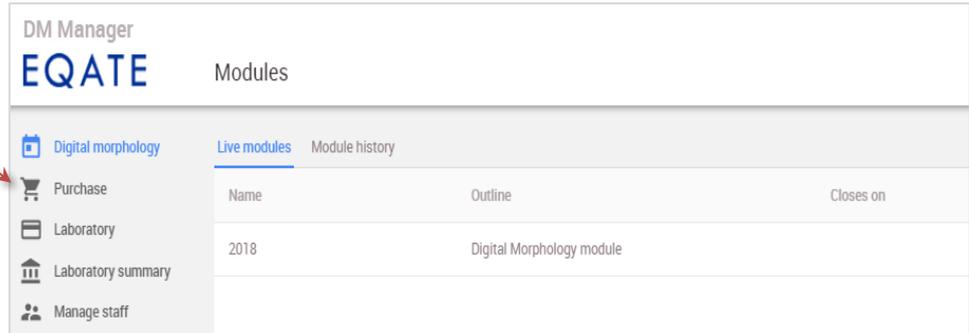
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7.4 To purchase extra user licences or accounts:

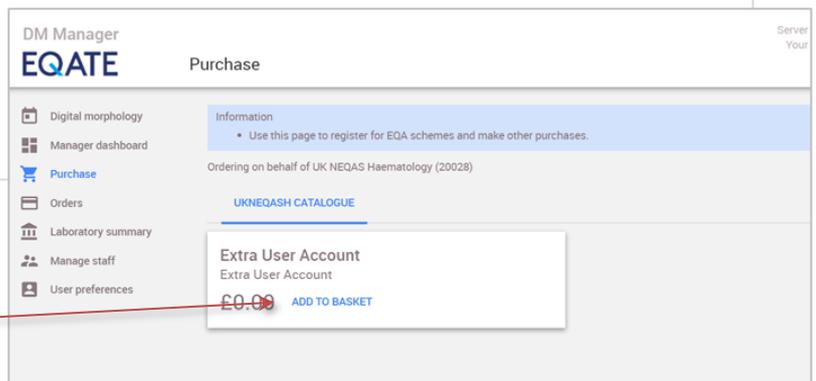
Amending the number of available licences is normally done during the annual re-registration process for renewal of EQA services. However, it is also possible to add extra licences mid-year.

➤ If you want to reduce the number of licences mid-year, please contact the UK NEQAS offices.

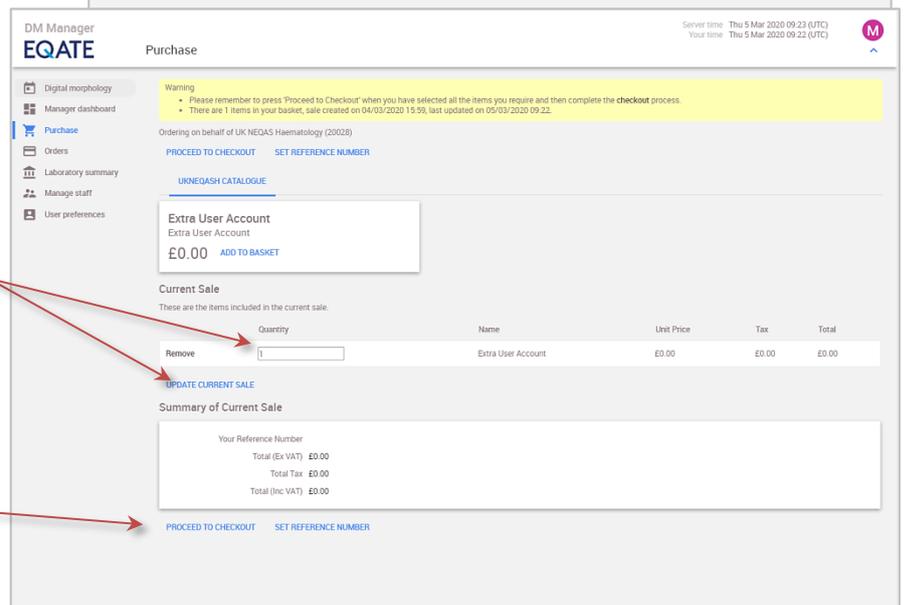
- Login to the Manager account and select the 'Purchase' tab



- There is only one catalogue item at present so 'Extra User Account' is pre-selected. Click on 'Add To Basket' to add more licences



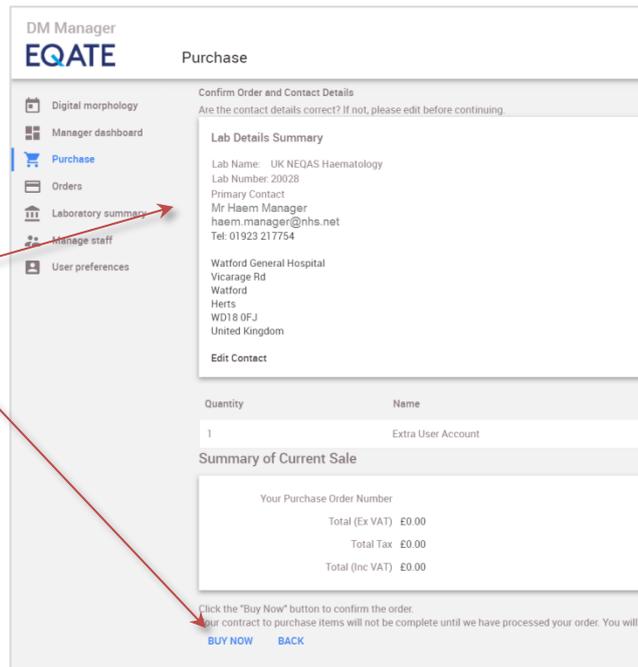
- When you have the correct number of licences entered, click on 'Update current sale' to save your order



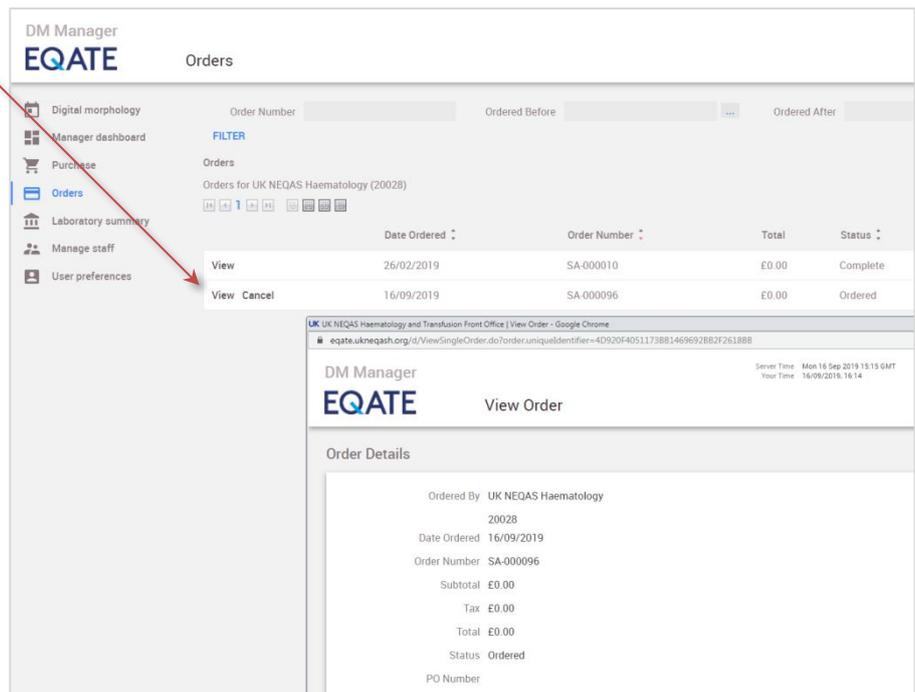
- And then click on 'Proceed to checkout'. You do not need to enter a purchase order (PO) number, but you can if you like for your own records

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- Check your details and click on 'Buy Now' to finalise your order



- You can review your order history under the 'Orders' tab. Select the date and then 'View'

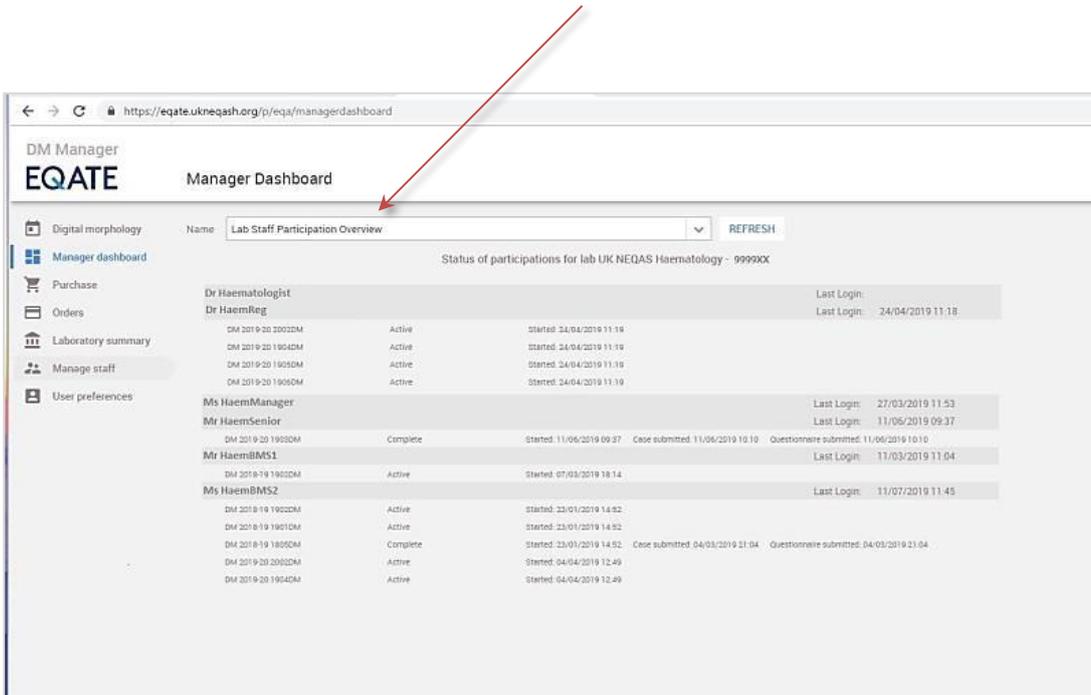


- Your order will be picked up by our offices and unless there is a query about the order, eg. the number of extra licences being requested, it will be processed automatically. An invoice will be forwarded and your order status on the 'Orders' tab will show your order as 'Complete'. Your quota under the 'Manage Staff' tab will also be updated to reflect the extra licences purchased.

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7.5 Manager's dashboard:

The facility to view team members' activity is now available to participants who have the 'Organisation Administrator' permission. When you have signed in you will see the 'Manager dashboard' tool on the left-hand side column, select this and then you will see a blank drop-down list labelled 'Name', click on this. There is only one option at present so select 'Lab Staff Participation Overview' and a summary of your team's activity will be shown. In future we aim to provide further queries to be available to supplement the 'Lab Staff Participation Overview' for administrators, please get in touch if you have any requests or suggestions.



8. FREQUENTLY ASKED QUESTIONS

What is the Digital Morphology scheme?

The Digital Morphology (DM) scheme is a web-based Continuing Professional Development (CPD) program aimed at professional scientists in the field of Haematology. The scheme was first trialed in 2008 and there are currently over 3,000 registrants.

Who organises the scheme?

The Digital Morphology scheme is organised and managed by UK NEQAS Haematology. The current system has been developed in partnership with Certus Technology. This is the second configuration of the system and was first opened to participants in December 2018 after successful transition from the old Slidepath system.

Who can participate in the scheme?

The scheme is open to healthcare and medical science staff and those with a professional interest in haematological morphology. Laboratories and teams outside of the UK may find it easier to apply for registration via UK NEQAS international Agents. Please contact us to find out who your local agent is.

How do I register for the scheme?

The scheme allows for registration of Individual participants, Laboratory managers with multiple team members in their laboratory, Agents, UK and Non-UK members. Registration for the scheme should normally be undertaken during the annual UK NEQAS Haematology re-registration period when all other UK NEQAS Haematology services are being purchased, however registration is possible at other times during the year. Individuals can register for the scheme by visiting the Digital Morphology home page, <https://eqate.ukneqash.org> and clicking on 'Apply'. This will activate an automated registration process and individuals are invited to pay via PayPal. Laboratories should contact UK NEQAS Haematology if licences are to be purchased outside of the re-registration period.

How much does the scheme cost?

Please contact our office for pricing information.

Is the scheme accredited?

The EQATE system is not currently registered with any accreditation service.

How can I find out more information?

Additional information relating to the Digital Morphology scheme, along with the broader range of services offered by UK NEQAS Haematology can be found on our website: <http://www.ukneqash.org>

How do I use the Digital Morphology Scheme?

The Digital Morphology scheme is entirely web-based; this means that all the surveys are accessed over the Internet. Once your account is activated, you can view the digital images and enter your results. All of these

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steps are performed through the web-based software and you will receive information via email which will guide you along the way.

Can usernames be changed?

No, the system generated usernames cannot be changed by users or administrators, but it is possible to set an 'Alias' which allows for the use of a more user-friendly username and this alias can be set and updated as you wish. Email addresses used as usernames can be updated at any time but must be valid and can only be applied to one account at a time.

What computer specification do I need to view the digital slides?

The system is designed to allow images to be displayed on most browsers and there is no further software required. For more information on this, please see the System Requirements section in the User Guide.

How do I submit my answers?

The Digital Morphology scheme is entirely online. The system prompts users to select morphology comments from a series of drop-down lists and there is a questionnaire which poses a variety of questions according to the case using a "tick-box" multiple choice system and free-text input.

Will anyone else be able to see my results?

No, your results are private unless you choose to share them. Your manager will be able to see whether you have completed a case but will not be able to see what you have entered unless they ask for a copy of your CPD certificate for review.

Can I log in to the same survey more than once?

Yes you can. There is no limit to the number of times you can log in to the survey before, or after, you submit your answers. However, after submitting your morphology comments you will not be able to change them, and the same for the questionnaire, once it has been submitted you cannot change it.

Can I save my answers if I need to logout before I submit them?

Yes you can. You can leave the case at any time and any morphology comments you have selected will be automatically saved. When you are completing the questionnaire, if you select 'Save' when you exit, your work will be stored and you can return at another time to work on it again.

How long do I have to submit my answers?

Each survey will be clearly marked with a closing date. Once the closing date has passed, you will no longer be able to submit your answers.

When will I be able to see the results for the survey?

Each survey is clearly marked with a closing date. After this date has passed, no new answers can be entered for this survey, and we will take some time to compile statistics and put together a summary commentary relating to the survey. You will receive an email when these are available, usually within 2 weeks of the closing date.

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Can I submit my answers more than once?

The system will only allow you to submit answers once so please take time to ensure you are happy with the responses you have chosen before you submit.

What happens if I don't submit any answers?

If you fail to / choose not to submit answers for a survey you will still have access to the case summary notes and annotations, however you will not be able to obtain a CPD certificate for that survey.

Can you unlock a case so that I can change my answers?

No – unfortunately this is not possible, so please be very careful to check that you are happy with your answers before you select 'submit' at any stage.

Can I make a copy of my CPD certificate for internal records?

Yes – the CPD Certificate for each survey will open as a PDF document. You can choose to save a digital copy or print a hard copy of this for your records, in the same way you would save or print a file on your computer. Note that you will need Adobe Reader or an equivalent PDF viewer on your computer to view the certificate.

How do I look at previous surveys?

Once you activate your account, you will gain access to the first survey that becomes available. Your license is valid for a total of 6 surveys over 12 months, and during the course of the year you will have access to any previous surveys that have become available since you activated your account, even if you did not submit answers. Note that you cannot access surveys from before the date you activated your account. Should your account expire you will still be able to see your old cases but you will not be able to access any of the new surveys.

How do I renew my account?

Depending on whether you are registered as an individual participant, or as part of a lab group, the renewal process will be slightly different. Please refer to the registration instructions in the General Questions section of this FAQ for more information or refer to the User Guide.

My login details are not recognised

If you have registered as an Individual, your login details will not be enabled until your application has been accepted and your credit card payment has been confirmed. This can take up to three working days and you will receive an email with your details once this has completed. If you are registered as part of a laboratory group, you should seek advice from your lab manager.

Do I need an activation key?

The new EQATE system does not require an 'activation key' to renew an account, this was a feature of the previous system and is no longer in use. Please contact our offices if you are having problems renewing your account.

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I have forgotten my username

You can logon using either your email address, your computer-generated username or an alias. If you really cannot recall any of these then please contact your lab manager or call our offices for assistance. Note that you will need to use the same email address you were registered on the system with, the system will search for login details based on that email address, and will forward notifications to that same email address.

My password does not work

Be careful not to add extra spaces before or after your username and make sure that the username you are using is correct.

You should be aware that if when you set your password you must use a minimum of 10 characters including Upper and Lower case letters, Numbers and Special characters. There is a warning if you neglect to do this and passwords that do not conform will not be accepted.

The system won't allow me to reset my password, I'm not getting any email links?

If you have never signed onto the system before, first ask your lab manager to check that your email address has been entered correctly. If you are an Individual user then please contact our offices to check this for you.

If you are certain that your email address is correct then it might be worthwhile just waiting a little longer for a notification to come through, some hospital networks can be very slow, particularly at certain times of day. Also please check your 'Spam' or 'Junk' folders; our notifications are sometimes misdirected there. Failing that we recommend you contact your IT department and ask them if there might be any firewall blocks preventing emails from the EQATE system coming through. If you are still having problems, then please contact our offices for advice.

Note that we are unable to reset your password for you.

I don't see any surveys when I login

When you login for the first time, there may not be any surveys open, so you will not see any available.

The images are very slow to navigate

Some users, particularly on hospital networks, may experience slow Internet performance during peak hours. This affects all Internet systems, including the Digital Morphology Scheme. We recommend that you try to access the scheme at a different time of day and to also try from a different computer maybe from home. If you are using a home computer, Internet traffic such as media streaming, file transfers, file downloading or online gaming will affect the speed of your Internet connection.

The images will not load when I open the viewer

The main reason for this is a slow Internet connection (see above). If you have been able to determine that these are not the problem, please contact us or ask your hospital IT for advice.

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My answers did not submit properly

If you experience any problems with submitting your morphology comments or answering the questionnaire please contact our offices for advice.

I can't retrieve my CPD certificate

The CPD certificate will only become available after a survey has closed and been reviewed. You will need to wait until the survey is fully completed before you can return to retrieve the certificate. You will receive an email notification when this becomes available. Also note that CPD certificates are only available to users who submit answers for a survey. If you have not submitted answers you will still have access to the survey summary, but you will not receive a certificate.

I can't open / print / save my CPD certificate

The CPD certificate is a PDF document, which requires an appropriate viewing program to be installed on your computer. We recommend Adobe Reader for viewing PDF files. However, if you are still experiencing problems, please contact us for assistance.

I am not getting email notifications

The main method of communication between the EQATE System and participants is email. It is vital that you enter a valid email address which you use regularly when activating your account and for future. You will not be able to open your account without a valid email address. Please be aware that some hospital networks may block email services such as Hotmail, Gmail, Yahoo and others. Also check that your email provider or hospital network is not blocking communications from the EQATE scheme or treating them as Junk or Spam. You can avoid this by 'allowing' the scheme address in your email or hospital system. If you are using a valid email address and you are still not receiving notifications, please speak to your lab manager or contact your local IT department.

Do you support Internet Explorer 9?

IE 9 is no longer supported by Microsoft. Support ended on April 11th, 2017. Microsoft encourages customers to upgrade and stay up-to-date on the latest browser for a faster, more secure browsing experience. If you are using IE 9 please follow the guidance above to upgrade to a supported browser.

Why don't you specify supported version numbers for Chrome and Firefox?

These browsers are frequently updated automatically. With such frequent changes it would be a burden to maintain compatibility listings and would have no real benefit. The recommendation is to use the most recent version.