



# UK NEQAS BTLP Training Assessment and Competency Tool (TACT) User Instruction Manual

## Section 1. Subscription and membership to TACT

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## Introduction

Welcome to the UK NEQAS BTLT TACT system. The aim of this system is to provide laboratory staff and managers with an online, fully-interactive knowledge-based training and competency assessment tool, not solely focussed on the practical applications of training, but on the theoretical knowledge of all laboratory Biomedical Scientists working in blood transfusion. Currently, TACT features a single scenario based on routine request handling, representing a typical request received in a hospital-based blood transfusion laboratory. Cases are randomly generated for users to work through, with six areas of automated assessment, based on BSH guidelines. These are sample and request acceptance, ABO interpretation, D interpretation, antibody screen, antibody identification (individual panels and a 'final interpretation stage'), and component selection for possible issue. With the data and rules that are held by the system it is possible to generate hundreds of cases within each participation where no two are likely to be the same. The automated assessment is based on criteria linked to BSH guidelines.

The laboratory manager has a dashboard display that keeps him/her informed of staff performance as well as how frequently each member of staff is accessing TACT. The TACT system initially defaults the target levels, but in a future development, every laboratory will be able to set its own targets for engagement for staff within each of the assessment areas to suit their own laboratory needs. Please read the disclaimer on page 4 regarding adjusting these targets to values lower than the recommended default.

The laboratory managers' dashboard display allows managers to achieve a full drill down into each participation completed by their staff members. Managers may also produce a spreadsheet containing engagement and performance data, and set the system to send automatic prompt emails to staff members who are not meeting engagement targets. The drill down takes the form of a review of a completed participation. The laboratory manager is presented with a timeline of a member's progress through a participation, including the order in which laboratory processes were accessed, the tests commissioned, the interpretations and decisions made, and the time taken to complete the participation. The manager is also given the ability to view the request form, cassette images, panel profile sheets and stock fridge contents presented to the member in the participation, so that he/she can visualise the decision-making process of the member, and the appropriateness of these decisions. The manager can very quickly see if an incorrect decision or interpretation was made, and take the necessary action to address an identified training and knowledge gap. The automated email settings, when activated, can also notify managers when a staff member has obtained a red mark for a participation.

Managers may also review completed cases with staff and make edits to the marked assessments in a fully auditable fashion, whilst taking local policies and practices into account. The member can also review their own performance using the individual participation dashboard feature, which allows them to review (but not edit) their own participation outcomes as above. Staff can build a portfolio of activity and outcomes which can be used to inform a competency rating, and can also generate a personalised certificate of engagement and performance.

There is an indicator to denote which participations contained 'complex' situations to be dealt with, enabling both manager and staff member to easily focus on which and how many of these situations have been encountered. The definition of a 'complex' case is:-

- One containing an un-interpretable (UI) ABO and/or D group
- Where the only correct red cell component selection is group O D Negative, except where the patient's blood group is O D Negative
- Where the selection of red cell components requires adherence to a patient's specific requirements.

Activities attempted/completed within TACT may be used as CPD evidence, and be transferred across organisations.

Additional features to be embedded in TACT in a future release includes an indicator beside completed cases to denote that, whilst the interpretations and selections made during the participation, whilst not in breach of BSH guidance or unsafe for the patient, may not represent 'optimal practice', in terms of management of, for example, blood stocks, time or cost to the department.

BSH 2012 Guidelines for pre-transfusion compatibility procedures in blood transfusion laboratories states 'Unless secure electronic patient identification systems are in place, a second sample should be requested for confirmation of the ABO group of a first time patient prior to transfusion, where this does not impede the delivery of urgent red cells or other components'. The current iteration of TACT does not hold any patient transfusion history, or the ability to request a second sample before red cell component issue is performed. In view of this, and as the tests 'Serological XM' and 'Electronic issue (EI)' are not currently active in the upgraded version of TACT, we would ask laboratory managers and members to view the exercise as a selection of units for potential issue. The functionality of providing a second sample and the inclusion of patient transfusion history are features of the software will be introduced to the system, along with crossmatching and EI.

## **Minimum System Requirements.**

You will need at a minimum either Internet Explorer v11, Google Chrome v28 or Firefox v22 to access the system. The minimum screen resolution to achieve optimal screen display is 1024 x 768. This will allow all of the user interface elements to be visible at once. Please ensure your browser is set to allow pop-ups.

## **Accessing the System.**

The TACT site may be accessed using the following link:-

<http://tact.ukneqasbtlp.org.uk>

It can take up to 72 hours for a TACT account to be authorised. There is no charge levied for subscription to TACT.

## Social Media.

The TACT social media pages can be accessed:-

<http://www.facebook.com/bt1p.tact>

@bt1p\_tact

## Disclaimers.

Any resemblance to any persons living or dead represented by the 'patients' generated in the scenarios of TACT is entirely unintended and coincidental.

The system is governed by complex probability and frequency logic rules for the randomised generation of a complex case, and the engagement targets have been optimised to ensure that complex cases are encountered. These targets are currently set at:-

|   |             |
|---|-------------|
| Request acceptance                      | 40 per year |
| ABO interpretation                      | 40 per year |
| D interpretation                        | 40 per year |
| Antibody screen                         | 40 per year |
| Antibody identification (and exclusion) | 10 per year |
| Component selection for possible issue  | 20 per year |

In a future development, managers will have the ability to adjust engagement targets for each of the six areas of assessment. However, if the engagement targets are adjusted to values lower than the default setting, it is likely that staff members may not encounter all complex cases programmed in the system.

## Subscription

To set up a new user, typically the laboratory manager, on the system:-

- Enter <http://tact.ukneqasbtlp.org.uk> into the browser address bar.
- The screen in figure 1 is displayed:-

**Figure 1.**



- Ignore the username and password fields, and click on 'Subscription' (circled red in figure 1). This allows you to access the registration pages to complete a subscription. The laboratory manager or designated administrator to TACT should create the subscription.
- There are two pages to complete for subscription. Fill in the details as illustrated:-

|                                       |   |
|---------------------------------------|---|
| Title:                                | Select from drop down menu  |
| First Name:                           | Your first name   |
| Last Name:                            | Your surname  |
| Email:                                | Your email address  |
| Phone No:                             | Your contact phone number   |
| Organisation Name:                    | Name of your trust / organisation   |
| PRN                                   | UK NEQAS PRN for your laboratory. Essential if you wish to be invoiced with annual EQA subscription |
| Additional PRN's (Optional)           | If your laboratory or laboratories have more than one PRN   |
| VAT Number (non-UK):                  | For subscribing organisations outside of the UK only  |
| Lab Direct Line Number:               | Contact Phone Number of the blood transfusion laboratory  |
| Number of sites providing BT service: | Insert number of laboratories you are responsible for   |

|                      |  |
|----------------------|--|
| PO Number:           | PO number for invoicing the subscription   |
| Contact Address:     | Insert appropriate address for your organisation   |
| Email Address        | Email address if different from above. You must complete this field even if the email address is the same as above         |
| Annual Billing       | Select 'yes' or 'no' to add the payment for TACT to be added to your existing BTLP account, when this option is available. |
| Account Details      | Complete if the answer to 'Annual Billing' is 'no'   |
| Billing Organisation | Complete if the answer to 'Annual Billing' is 'no'   |
| Billing Address      | Complete if the answer to 'Annual Billing' is 'no'   |

- Once all the fields have been completed as instructed click 'Finish'. A screen appears informing you that your application has been saved and that it will be reviewed with further information to follow. You may exit the application at this point.
- Once your account application has been approved by UK NEQAS BTLP (this can take up to 72 hours) you will receive two emails. One of the emails is to inform you that the account has been approved. The subject of the second email is 'offer new password'. This email provides a username (circled red in figure 2.), and by clicking on the provided link to 'click here to change your password' you will initiate a further email that will provide your password. Once this further email is received you will have both username and password. Exit without clicking any associated links in the email.

**Figure 2.**

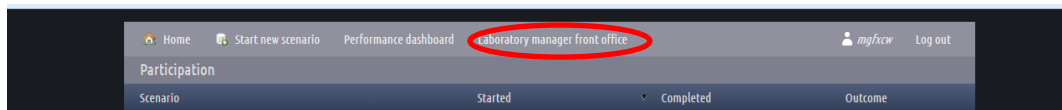


- The link to change your password in the second email is active for 48 hours, and the email contains information of the expiry time of the link. There is also a second link to generate another 'offer new password' email for use if the 48 hour time limit elapses before you use it.

## Laboratory Manager Front Office

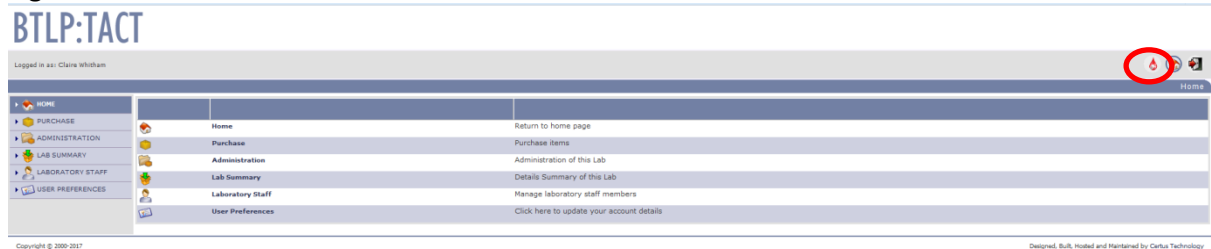
- The Laboratory Manager Front Office is the area of TACT where the laboratory manager or designated individual can administrate the system. Individual members can be added and edited, extra user accounts ordered, invoices viewed and administrator details amended or edited.
- Members may also access the Laboratory Manager Front Office, but the available functions will be limited.
- Enter <http://tact.ukneqasbtlp.org.uk> into the browser address bar.
- Log in by completing the username and password fields. Note:- the username and password are case sensitive. The username will not contain capital letters but may include a numerical character. It is advisable at this stage to copy and paste your username from the email. Click 'Login' and then click 'Enter', this will log you in to the 'live environment'. From here, click on 'Laboratory manager front office' (circled red in figure 3).

Figure 3.



- You will be taken to the laboratory manager front office screen, as shown in figure 4:-

Figure 4.



- The system will time out after a period of 30 minutes of inactivity. After this time, you will need to log on again to continue. To reach the live environment from here, click on the blood drop icon, circled in red in figure 4.

## Navigating around the Laboratory Manager Front Office.

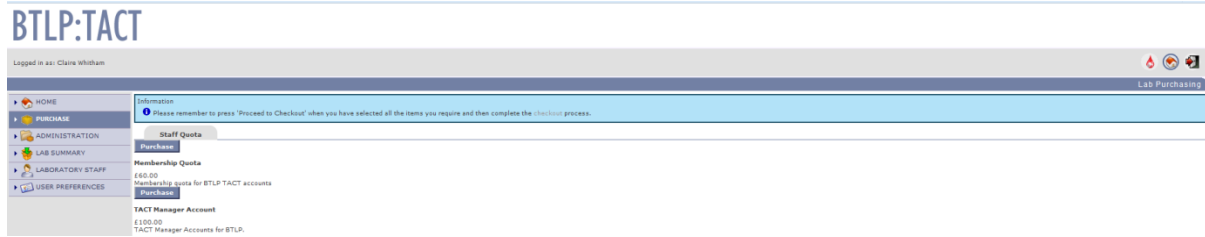
- The menu options listed to the left of the screen are the same as the menu options in the centre of the screen. Either may be used to navigate around the front office area of TACT.
- Click on any of the menu options to be taken into the submenu for that option.

## Purchase

- The purchase menu option screen appears as in the image in figure 5:-

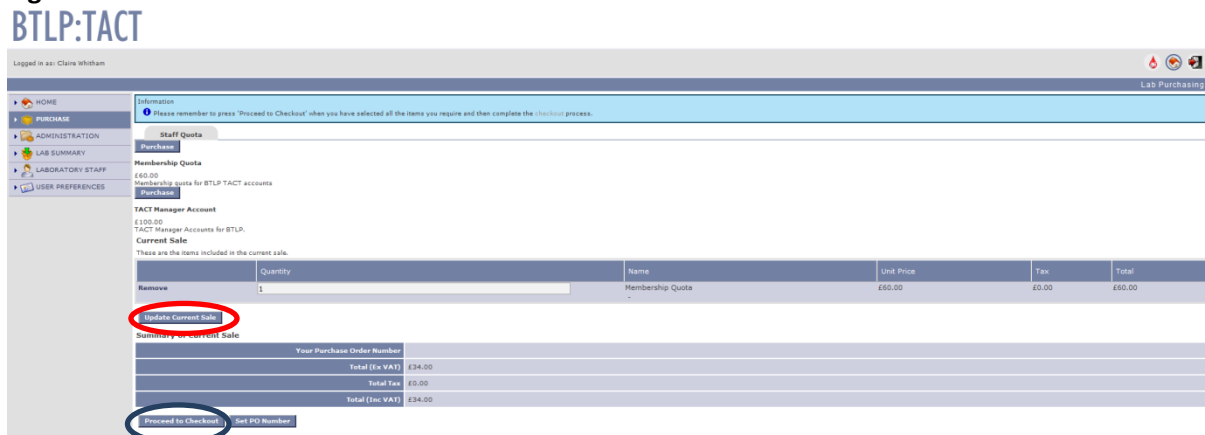


Figure 5.



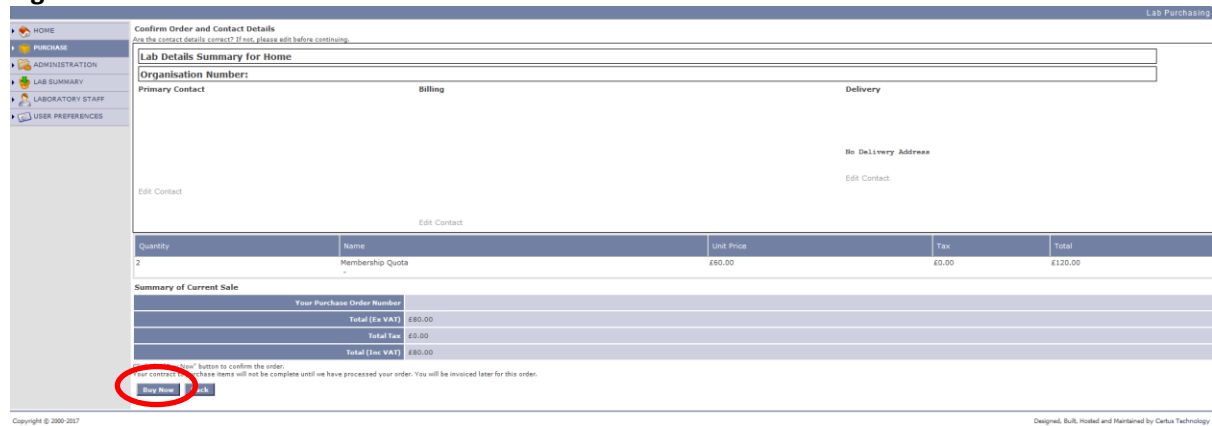
- There are two product options to choose from; purchase of membership(s), and purchase of a manager upgrade.
- To purchase memberships, click on the top 'purchase' icon.
- To purchase a manager upgrade, click on the bottom 'purchase' icon. The manager upgrade grants administrative rights to a chosen staff member.
- A 'current sale' table is displayed, as in figure 6:-

Figure 6.



- In the 'quantity box' type in the number of memberships you wish to purchase. Click on the 'update current sale' button (circled in red in figure 6). The price for the number of memberships requested is displayed, with discounts for multiple memberships applied.
- Note:- if you are a returning customer with pre-existing memberships, and wish to increase your quota, enter in the number of extra memberships you wish to purchase. The price displayed at this point may not be the price you are invoiced for, as the invoices are raised through the West Herts Hospitals Finance Department.
- The purchase order number for invoicing purposes can be input here, by clicking on the 'set PO number' icon. A PO number is essential for billing if you do not want your memberships adding to your BTLP re-registration invoice, or if you are purchasing memberships after your BTLP invoice has been paid.
- Click on the 'proceed to checkout' icon (circled in blue in figure 6). The screen in figure 7 is then displayed:-

Figure 7



- Click on the 'buy now' button, circled in red in figure 7.
- In the next screen, your purchase is confirmed. UK NEQAS BTLP will then authorise the order and arrange for an invoice to be forwarded to your organisation. Where memberships have been purchased, once UK NEQAS BTLP has authorised the order, you may begin adding staff members onto the TACT system, and where a manager upgrade has been purchased, you may select a member to receive the extra administrative rights on their membership. This will usually be within 72 hours of the order being received. You are able to add staff members or carry out the upgrade **before** payment is completed.
- If you wish to purchase extra memberships or manager upgrades, please repeat the process.
- A price list for subscribers outside of the UK is available on request.

### Administration

- There are three submenu options in the Administration menu option: orders, invoices, and ledger.
- The Administration menu allows you to view your current orders, invoices and your account balance.

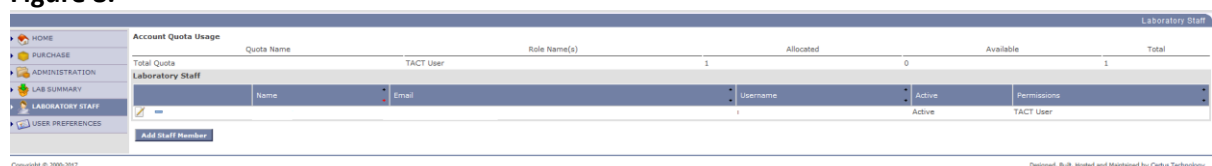
### Lab Summary

- The Lab Summary menu option holds details of your primary contact details, and billing and delivery addresses.
- If any details in the Lab Summary are incorrect, please contact a member of the UK NEQAS BTLP TACT team.

### Laboratory Staff

- The Laboratory Staff menu option screen appears as in the image in figure 8:-

Figure 8.



- The Laboratory Staff menu option is where you are able to add individual members of the laboratory staff to TACT, up to the limit selected at purchasing, or choose a member to receive the manager admin rights, if already purchased.
- Click on Laboratory Staff and this will take you to a screen where you can add staff to the system.
- Click on the 'Add Staff Member' icon. The screen in figure 9 will be displayed:-

**Figure 9.**

- Enter details of staff members, i.e. title, first name, surname, and email address, up to the total number of staff memberships have been purchased for.
- The permissions box display's 'TACT User' and 'TACT Manager'. If no option here is selected, the system will default the member to be a TACT User. If a manager upgrade has been purchased, the option for TACT manager can be selected.
- Click 'Add' when complete.
- Each member of staff added will receive an email quoting their username and giving them a link to obtain a password. Comprehensive instructions on how to use TACT are available on the UK NEQAS BTLTP website. Once members have both username and password they can access TACT through the link given below:-

<https://tact.ukneqasbtlp.org.uk/>

- To grant an existing staff member administrative rights, obtained by purchasing the manager upgrade product, click on the 'edit' icon beside the name of the staff member, as shown in figure 10:-

**Figure 10.**

- Click on the option 'TACT Manager'. Click the 'Update' icon to save your changes.
- Staff members can also be removed from the system, by clicking on the blue bar icon to the left of the member name, as shown in figure 11, circled in red:-

**Figure 11.**

| Quota Name              | Role Name(s) | Allocated | Available | Total       |
|-------------------------|--------------|-----------|-----------|-------------|
| Total Quota             | TACT User    | 1         | 0         | 1           |
| <b>Laboratory Staff</b> |              |           |           |             |
| Name                    | Email        | Username  | Active    | Permissions |
|                         |              |           | Active    | TACT User   |

[Add Staff Member](#)

- Removing a staff member will increase the membership quota by one. The removed member can then be replaced with the details of another staff member. The TACT record of the removed member is not deleted, but archived, and can be retrieved at a later date if necessary.
- Memberships can be transferred between organisations. Contact [tactsupport@ukneqas.org.uk](mailto:tactsupport@ukneqas.org.uk) for assistance.

## User Preferences

- There are two submenu options in the User Preferences menu: account settings and change password, as shown in figure 12 below:-

**Figure 12.**

Information  
 Don't like your username? Then edit your account and create yourself a username alias, you will then be able to login with this new alias.

**Account Summary**

|              |     |
|--------------|-----|
| Username     | m   |
| Title        | Mrs |
| First Name   | J   |
| Last Name    | W   |
| Display Name | J   |
| Email        | j m |

[Edit Account](#)

**Web Page Options**

|                      |          |
|----------------------|----------|
| Language preference  | {NotSet} |
| Number of Table Rows | {NotSet} |

[Edit Settings](#)

- It is possible to edit the details of a membership here, including member name and email address, apply an 'alias' to a username, select a language preference, and to change a password.
- Whilst in the 'account settings' submenu, click on 'edit account' to change a member name and/or email address, and to apply an alias to a username. The screen shown in figure 13 will be displayed:-

**Figure 13.**

**Edit Account**

|                |     |
|----------------|-----|
| Title          | Mrs |
| First Name !   | J   |
| Last Name !    | W   |
| Display Name ! | J   |
| Email !        | j   |

**Username Aliases**

Username aliases allow you to login to the system with alternative usernames. The username aliases must be unique, if someone else is using an alias, you v  
You currently have 0 aliases out of the allowed 1.

| Alias |
|-------|
|-------|

- To change member details, delete and overwrite within the available text boxes, and click on 'save'. To cancel your changes, click on 'cancel'.
- To apply a username alias, click on 'create username alias'. The screen as shown in figure 14 below will be displayed:-

**Figure 14.**

**New Username Alias**

Alias!

- Type an alias into the text box. Please note, if the alias is already in use, it will not be available to use on this membership.
- Click on 'create alias' to save your alias, or 'cancel' to discard the changes.
- The screen will return to that shown in figure 13, with the exception that your alias will be displayed under 'username aliases'. Click on 'save'.
- From the account settings submenu, to change you language preferences, click on 'edit settings' as shown in figure 12. The screen as shown in figure 15 will be displayed:-

**Figure 15.**

**Edit Settings: Web Page Options**

This tab allows you to set options for displaying web pages

|                       |          |
|-----------------------|----------|
| Language preference   | English  |
| Number of Table Rows? | {NotSet} |

- Drop down the language preference list, and select your preferred language from the list. Click 'save' to save your selection, or 'cancel' to discard any changes.
- To change a password, click on the 'change password' submenu. The screen shown in figure 16 below will be displayed:-

Figure 16.

Information

**i** Your password must

- i** contain at least 10 characters
- i** contain numbers, upper and lowercase letters and special characters
- i** not match your username

Current Password

New Password

Confirm Password

[Change Password](#) [Reset](#)

- Type your current password into the text box beside 'current password'. Type your new password into both the 'new password' and 'confirm password' boxes, ensuring that the specification in the blue information box as shown in figure 16 has been satisfied.
- Click on 'change password'.