



NATA Portal – Technical Assessors Reference Guide

March 2023

The purpose of this document is to act as a Guide on how to use the NATA Portal. NATA Portal is our preferred method for communicating job related information and documents with our Technical Assessors. Technical Assessors must also keep their profile information up to date with us using the platform.

If you need any further assistance, please contact us at technicalassessors@nata.com.au or portalsupport@nata.com.au

Browser Compatibility

NATA Portal is Compatible with both desktop and mobile
(Windows PC, OS X, Android and iOS)

Supports the latest versions of the following browsers:

Google Chrome, Microsoft Edge, Mozilla Firefox and Apple Safari



No Support for Internet Explorer



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1. Getting Started

Registration

Technical Assessors will be registered to the portal automatically as they associated with us and provide us with their information.. Once registered as a Technical Assessors user on the portal, you will receive an email to set up a password for the NATA Portal login. Follow and complete the steps to set your password.

Please note: The initial welcome email link to set password will expire in 48hrs, after this you can directly visit <https://nataportal.nata.com.au/#/> and click on reset password to generate another activation link.

Setting up 2 Step Verification

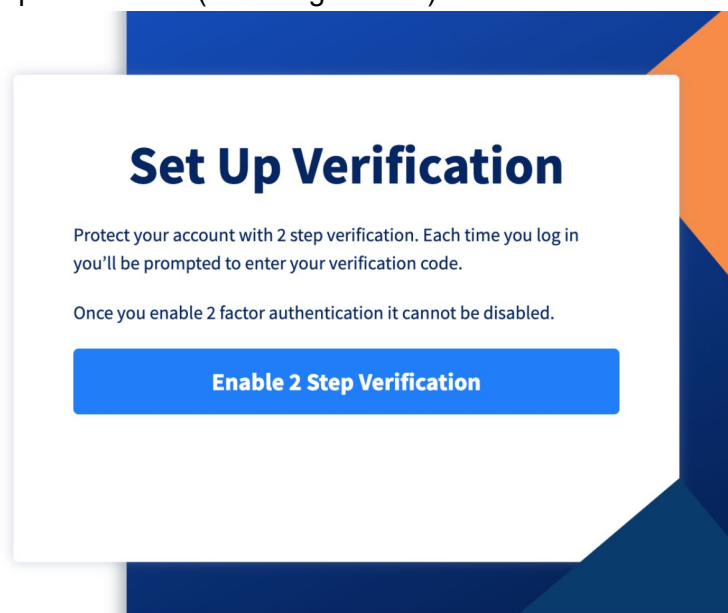
2 Step Verification allows for added security to your access of the NATA Portal. It allows you to verify that you are the legitimate holder of the login credentials by sending you a code to your mobile device and only allowing you access once inputting this code.

Please note that the steps of receiving and inputting a new verification code will need to be repeated when:

- Accessing the Portal from another device (e.g. another computer)
- After 15 days when the verification expires

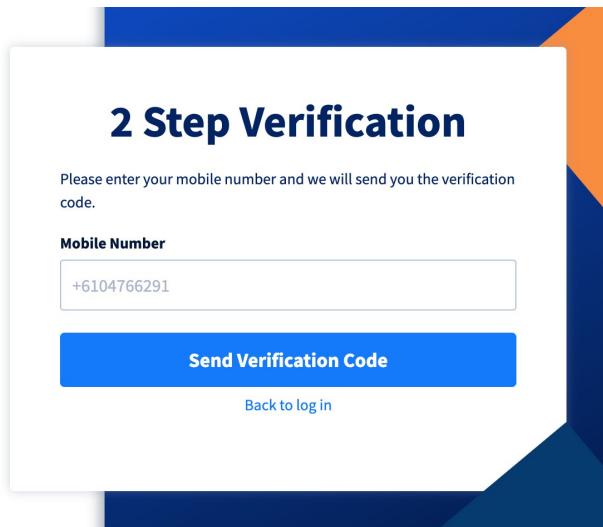
Steps

1. Using your email address and your newly set password, log in to NATA Portal. Here you will be presented with a Set Up Verification screen where you will be able to enable your 2 Step Verification (see image below)



2. Click on *Enable 2 Step Verification*

Enter your Mobile contact number in the correct format i.e. starting with country code +61 and no leading zeros +61405699876. You will then receive a Verification code to your mobile device as shown below



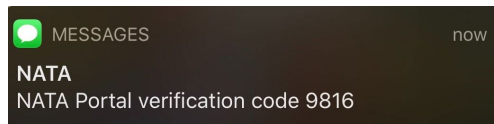
2 Step Verification

Please enter your mobile number and we will send you the verification code.

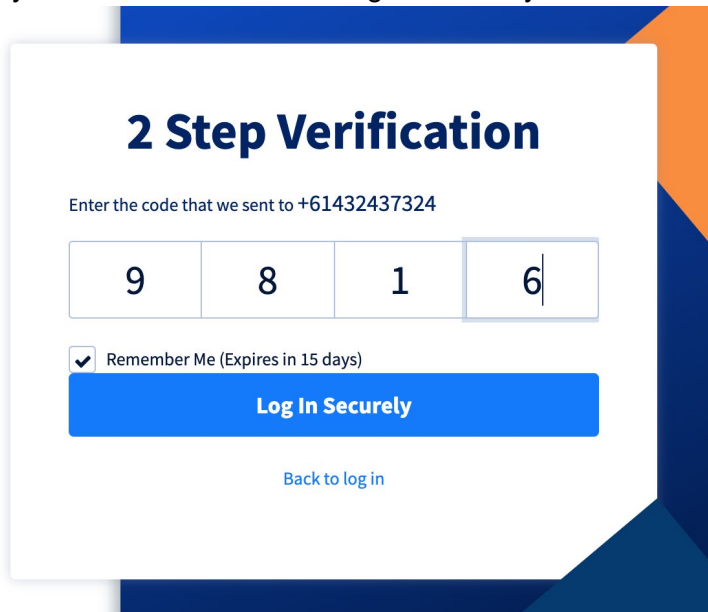
Mobile Number

Send Verification Code

[Back to log in](#)



3. Use your Verification code to Log-in Securely into the NATA Portal.



2 Step Verification

Enter the code that we sent to +61432437324

9	8	1	6
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☒ Remember Me (Expires in 15 days)

Log In Securely

[Back to log in](#)

Dashboard

Once you are logged in to the Portal, you will be taken to the Dashboard view.


The Dashboard includes a quick view of information that has been recently updated on the portal; it also allows you to quickly access the information with one click. As a Technical Assessor you can see the following information panels on the Dashboard;

- Latest Notifications
- Recently uploaded Meeting Documents
- Recently added Publications to which you are subscribed

Clicking on any of the Notifications or Jobs will automatically navigate you to the location in the portal where you will find the source. For example, if you click on the job number you will be directed to the Jobs details page.

Job ID	Job Type	Visit Date	Site Name	School	State	Site ID	Status
07752	CPE	22/10/2020		ORANGEVILLE	NSW	02487	On Progress
07583	RES	11/06/2020		CANBERRA	ACT	00352	Completed
07658	AGE	24/06/2020		ORANGEVILLE	NSW	02487	On Progress
07619	SRU			WEST RIDE	NSW	00006	Planned
07775	STV			ORANGEVILLE	NSW	02487	Planned

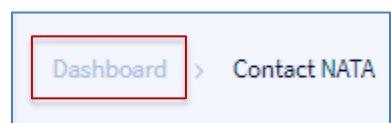
Name	File Path	Updated
social-thumb.png	Testing\SL\test\2020\September\2020\	20/10/20
dr-walsh-shield.png	Newsletters\NATA News\	20/10/20
NATA-RCR-reengineering-Central-governance-WP.pdf	20September20 Testing\	20/10/20
IS-13-19-Office-Coordinator.pdf	Publications for Consultation\Testing\p...	19/10/20
Animal Health-ISO-IEC-17025-appendix-1p	Publications for Consultation\Appl...	08/10/20

Note: All NATA Portal notifications will be visible at the top of the screen with the bell icon  that displays a number showing how many *unread* notifications you have.

Accessing Dashboard from other pages



If you want to go back to Dashboard from any other pages on the Portal, click on the '**NATA World Recognised Accreditation**' logo on the left-hand top corner OR

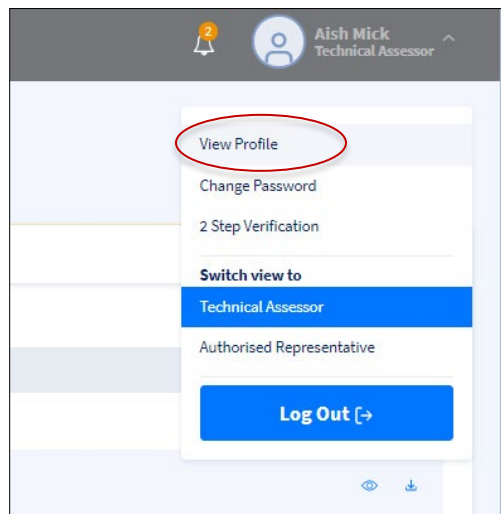


Click on the 'Dashboard' link from the breadcrumb menu on the page, displayed just above the page Title.

Marking Profile information as up to date

Periodically NATA will contact you to confirm your profile details with us. You can view your profile information that you have registered with us by accessing your profile information page on the portal. Once you have reviewed all the details and if no changes are required, you will be able to mark your profile as up to date to let us know.

To view your profile, click on the profile icon and select 'View Profile' from the drop down.

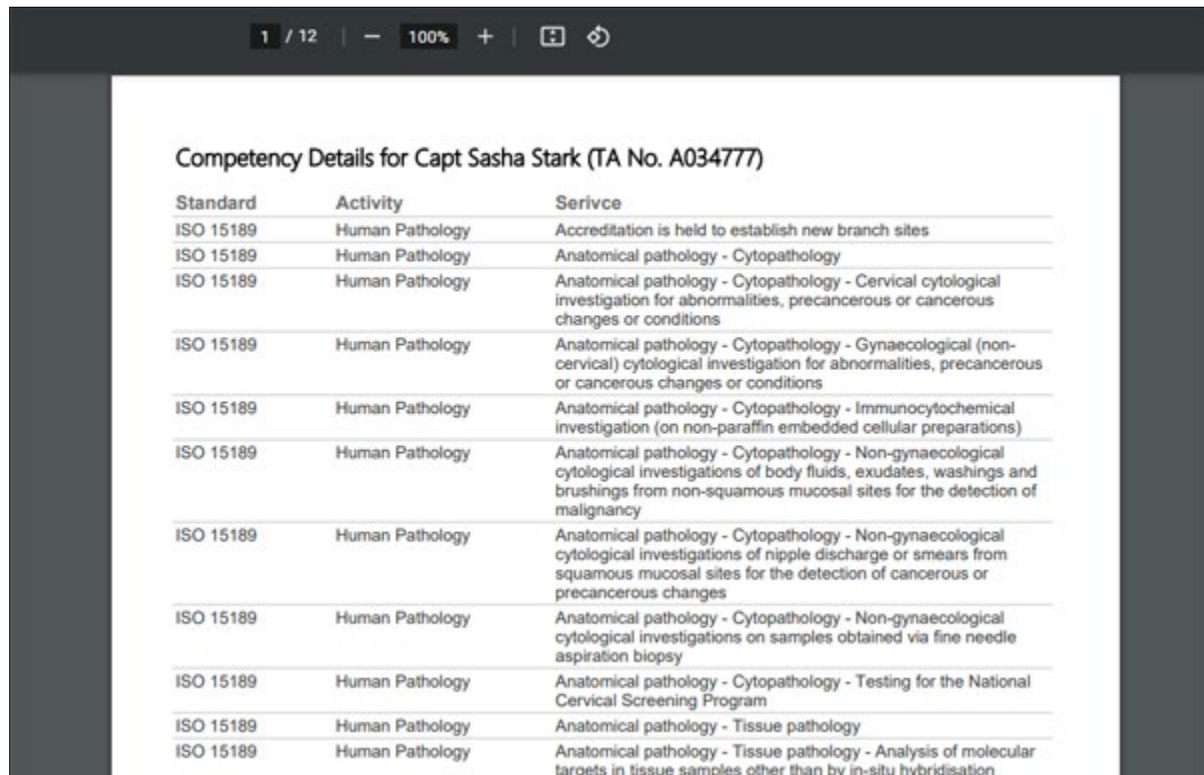


Once you click on the 'View Profile' menu item the system will load all the profile information you have registered with us.

A screenshot of the 'Profile' page in the NATA portal. The page is divided into several sections: 'Personal Details', 'Competency Details', 'Email Details', 'Phone Details', 'Home Address', and 'Work Address'. The 'View Competencies' button in the 'Competency Details' section is highlighted with a red arrow. At the top right, there are buttons for 'Profile is up to date', 'Edit Profile', and 'Change Password'. A red arrow points to the 'Profile is up to date' button. Below the profile sections, there are notes regarding email, address, and facility details updates.

You will see the '**Mark profile is up to date**' button is disabled because you must view your competencies (competency is/are the area(s) of technical expertise which you are qualified to assess) to ensure they are up to date as well along with all the other profile information. To view competency, click on the 'View Competency' button and this will open your competency PDF in

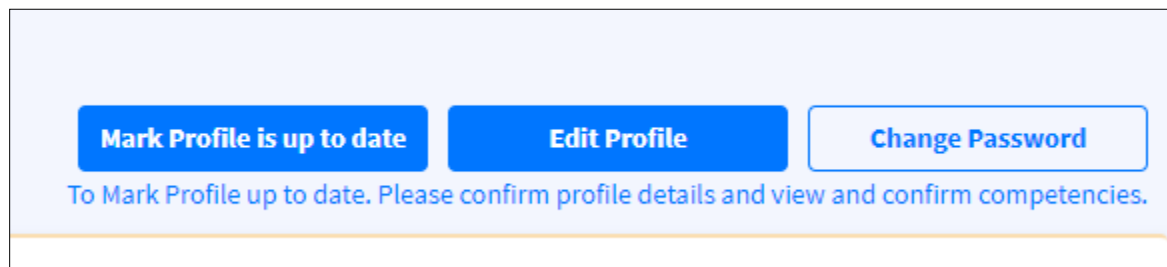
a new window if you are using Google Chrome or download the PDF into your downloads folder on your computer if using Microsoft Edge browser.



The screenshot shows a PDF viewer interface with a dark header bar containing navigation icons and a page indicator '1 / 12'. The main content area displays a table titled 'Competency Details for Capt Sasha Stark (TA No. A034777)'. The table has three columns: 'Standard', 'Activity', and 'Service'. It lists 11 rows of competency data, all under the 'ISO 15189' standard and 'Human Pathology' activity, with various specific services listed in the third column.

Standard	Activity	Service
ISO 15189	Human Pathology	Accreditation is held to establish new branch sites
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology - Cervical cytological investigation for abnormalities, precancerous or cancerous changes or conditions
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology - Gynaecological (non-cervical) cytological investigation for abnormalities, precancerous or cancerous changes or conditions
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology - Immunocytochemical investigation (on non-paraffin embedded cellular preparations)
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology - Non-gynaecological cytological investigations of body fluids, exudates, washings and brushings from non-squamous mucosal sites for the detection of malignancy
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology - Non-gynaecological cytological investigations of nipple discharge or smears from squamous mucosal sites for the detection of cancerous or precancerous changes
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology - Non-gynaecological cytological investigations on samples obtained via fine needle aspiration biopsy
ISO 15189	Human Pathology	Anatomical pathology - Cytopathology - Testing for the National Cervical Screening Program
ISO 15189	Human Pathology	Anatomical pathology - Tissue pathology
ISO 15189	Human Pathology	Anatomical pathology - Tissue pathology - Analysis of molecular targets in tissue samples other than by in-situ hybridisation

View the PDF and ensure the competency information is up to date and then go back to the profile page and mark your profile as up to date by clicking on the **'Mark Profile is up to date'** button.



This block contains three blue buttons with white text: 'Mark Profile is up to date', 'Edit Profile', and 'Change Password'. Below the buttons is a blue text message: 'To Mark Profile up to date. Please confirm profile details and view and confirm competencies.'

Mark Profile is up to date **Edit Profile** **Change Password**

To Mark Profile up to date. Please confirm profile details and view and confirm competencies.

In case you need to make changes to any of the profile details and competency details refer to Editing profile Information (next page) in the user guide.

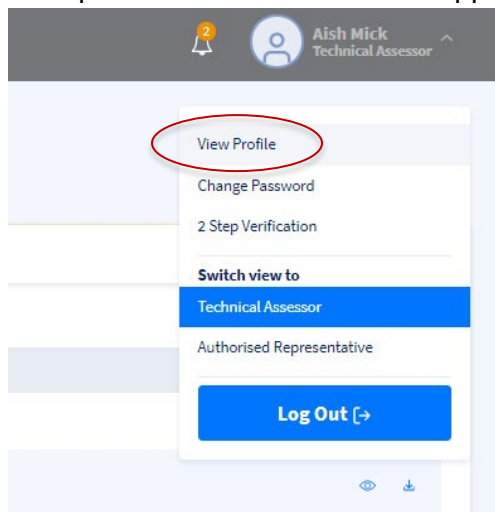
Editing Profile Information

Please note: Any profile changes suggested by you will not be reflected immediately. They are subject to approval by the NATA. Only once approved, they will be reflected on your profile and you will receive a notification on your dashboard and registered email informing that the profile changes has been approved.

In case the admin reject the profile changes, you will be informed why they were rejected.

To edit your profile information, follow the below steps:

1. Once you have logged in to the NATA Portal, click on your profile name at the top right corner of your screen.
2. A dropdown as shown below will appear, click View Profile.



3. You will then be directed to your Profile Page where you will be able to see all your profile information including email, phone, address and competency details (competency is/are the area(s) of technical expertise which you are qualified to assess) that you have provided to us. Click on [Edit Profile](#) button to edit these details.

Dashboard > Profile

Profile

Mark Profile Inactive Edit Profile Change Password
To Mark Profile up to 50%: Please confirm profile details and view and confirm competencies.

Personal Details		Competency Details View Competencies	
Position Title	Technical Assessor		
First Name	Sasha		
Last Name	Stark		
Email Details		Phone Details	
Type	Email	Type	Phone
Work:	sweetsee@gmail.com	Work:	+610234567891
Personal:	sweetsee@yahoo.com	Mobile:	+610403456783
		Home:	+610234560974
Home Address		Work Address	
Address	17 Bulbi Road	Address	7 Leeds Street
Suburb	PENMURBY	Suburb	AARONS PASS
Country	AUSTRALIA	Country	AUSTRALIA
State	NSW	State	NSW
Post Code	2145	Post Code	2850

Notes:

- The above email will be used as the primary contact for all NATA correspondence
- Above address details are for registration/identification purpose only, any changes made to the profile details will only appear on the profile once approved by NATA.
- To change the appointed Authorized Representative or Facility details please complete the [Facility Details Update \(FDU\)](#) form and upload it on the Portal at the Site level or email us the form on portal.support@nata.com.au.

4. The system will load the edit profile page and you will be able to make all the necessary changes to your profile information. The fields are shown in the below image. You will also be able to change your primary contact details by clicking on the radio button listed next to the field. You must have at least one type of email, phone and address marked as 'Primary' to let us know your preferred email, phone and address to communicate. Remember if you do want to change your primary email, you must use the changed email to login to the portal once the changes are approved.

Dashboard > Profile > Edit Profile

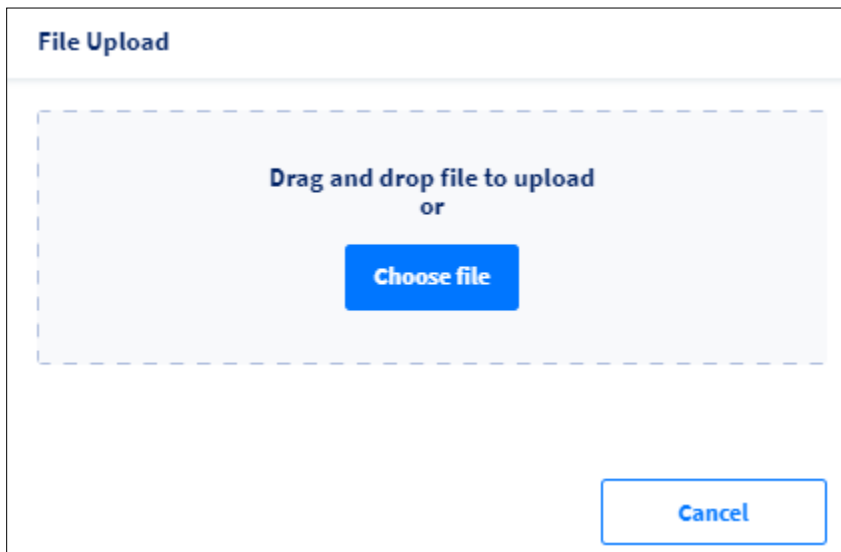
Edit Profile

[Change Password](#) [Save Changes](#)

Personal Details		Competency Details View Competencies Suggested Changes <input type="text"/> And if required Upload a document with suggested changes to competencies	
Position Title	Technical Assessor		
First Name*	Sasha		
Last Name*	Stark		
Email Details		Phone Details	
Type	Email	Type	Phone
Work:	sweetsee@gmail.com	Work:	+61 0234567891
Personal:	sweetsee@yahoo.com	Mobile:	+61 0403456783
		Home:	+61 0234560974
Home Address		Work Address	
Address*	17 Bulbi Road	Address*	7 Leeds Street
Country*	AUSTRALIA	Country*	AUSTRALIA
State	NSW	State	NSW
Suburb*	PENMURBY	Suburb*	AARONS PASS
Post Code*	2145	Post Code*	2850

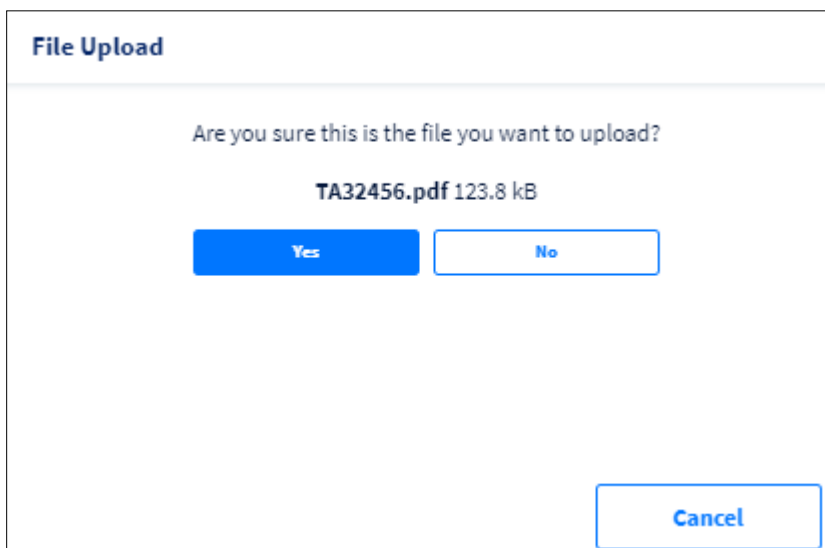
You can also suggest changes to your competency by entering them into the 'suggest changes' box and if required upload a document listing competency change by clicking on the 'Upload a document with the suggested changes to competencies' button.

Once you click on the button to upload a document the system will give you an option to choose the file to upload or drag and drop.

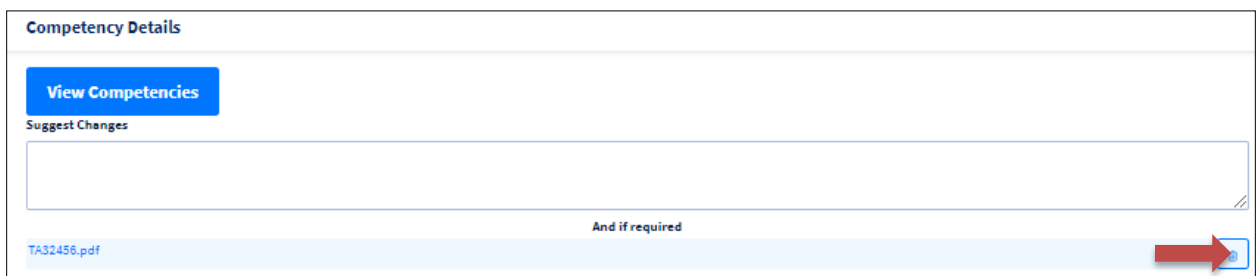


The 'File Upload' dialog box features a title bar with the text 'File Upload'. Below the title bar is a large dashed rectangular area containing the text 'Drag and drop file to upload or' and a blue button labeled 'Choose file'. At the bottom right of the dialog is a button labeled 'Cancel'.

Select the file to upload or drag and drop the file in the upload section and the system will then display the file to be uploaded and ask you to confirm. If you are sure that's the file to upload click on confirm button and the system will do a quick virus scan and upload the file.



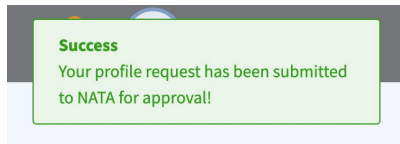
This confirmation dialog box has a title bar 'File Upload'. The main content area asks 'Are you sure this is the file you want to upload?' and displays 'TA32456.pdf 123.8 kB'. Below this are two buttons: a blue 'Yes' button and a white 'No' button. A 'Cancel' button is located at the bottom right.



The 'Competency Details' section includes a 'View Competencies' button and a 'Suggest Changes' text input field. Below the input field is a table with one row containing the file name 'TA32456.pdf'. To the right of the table is a blue button with a red arrow pointing to it, labeled 'And if required'.

In case you want to upload a different file at this stage, you can delete the file and upload a new one by clicking the delete icon on the file.

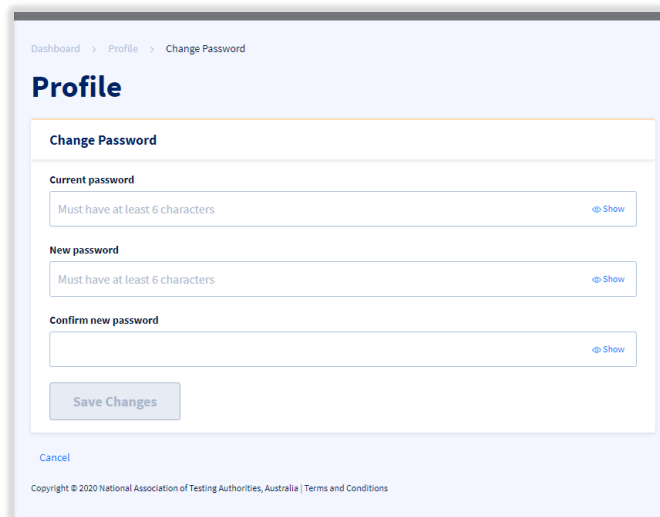
5. Click on **Save Changes** once you have completed editing your profile. You will be directed back to your Profile Page and will receive the alert shown below.



Change Password

To change your password once you are logged in, click on the 'Change Password' option from the drop-down profile menu as highlighted in the below image.

The system will load up the below screen where you will have to enter the current password, new password and save changes. Once the changes are saved, you can start using the changed password for logging in to the Portal.

A screenshot of the 'Change Password' form in a web portal. The form is titled 'Profile' and 'Change Password'. It contains three input fields: 'Current password', 'New password', and 'Confirm new password'. Each field has a placeholder text 'Must have at least 6 characters' and a 'Show' button. Below the fields is a 'Save Changes' button. At the bottom left is a 'Cancel' link. At the bottom right is a copyright notice: 'Copyright © 2020 National Association of Testing Authorities, Australia | Terms and Conditions'.

2 Step Verification

If your mobile number gets changed, you can update your mobile number for the 2-step verification process from your profile. Click on the '2 Step Verification' from the profile drop down menu and the system will load the screen as shown below. Enter the new mobile number prefix with +61 and click on 'Send Verification Code'. The system will send a code to you new mobile, enter the code and submit. The mobile number will be updated for 2 step notification on

your profile.

Profile

2 Step Verification

Please enter your mobile number and we will send you the verification code.

Mobile Number

+61434678075

Send Verification Code

[Cancel](#)

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Dashboard > Profile > 2 Step Verification

Profile

2 Step Verification

Enter the code that we sent to

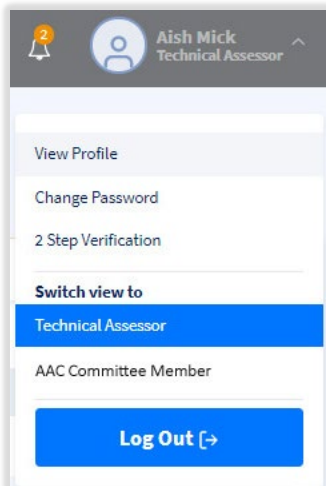
1	8	5	7
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Submit

[Cancel](#)

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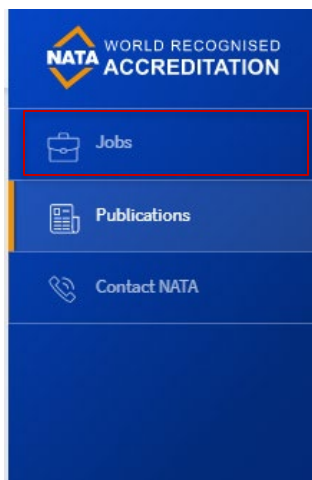
Switching Roles (If you are registered for more than 1 role)



The portal caters for different types of users. If you are eligible for one of the other user types, you might be able to have more roles on the Portal. You can easily switch profile between these roles with just one click without logging off from the Portal.

To switch profile and view the data related to other profile, click on your profile name on the right corner of the screen. A profile drop-down menu will appear as shown on the left, if you are registered for more than 1 role you will see the 'switch view to' section and roles listed in there. The profile you are currently viewing will be highlighted in Blue. Click on the role you want to switch to, the system will ask you to confirm if you really want to switch your view, click 'OK' and the system will show you data relevant to your selected role.

2. Jobs



All the jobs that you are currently associated with NATA can be viewed on the Jobs page. Jobs page can be accessed by clicking on the 'Jobs' tab from the left-hand navigation.

The system will take you to the Jobs landing page listing all the jobs that you are assigned to. Every job entry listed on the jobs page will display Job Id, Job Type, job status, visit date, facility name, facility number, and site name and site number.

Searching/Filtering Jobs

Jobs can be searched/filtered from across several pages listing jobs. Users can search jobs by entering a keyword in the search box or by selecting the desired value from the drop down if applicable.

Job ID	Job Type	Status	Visit Date	Facility	Facility ID	Site	Site ID
077766	SRV	In Progress	29/10/2020 11:00	ABC Facility Pty LTD	020855	Site 1 - Sydney laboratories	025043
077765	ARE	In Progress	27/09/2020 10:00	ABC Facility Pty LTD	020855	Site 1 - Sydney laboratories	025043
077767	QTV	In Progress	07/06/2020 10:00	ABC Facility Pty LTD	020855	Site 1 - Sydney laboratories	025043
077769	ASS	In Progress	11/11/2020 11:00	ABC Facility Pty LTD	020855	Site 2 - Melbourne	025044

To search/filter jobs by Job Id, enter the keyword in the search field just below heading 'Job Id' and system will show the desired result.

To search/filter jobs by Job Type, select the job type from the drop-down list just below heading 'Job Type' and the system will show you the desired results

To search/filter jobs by Job Status, select the status from the status drop down list just below heading 'Status' and the system will show the desired results

To search/filter jobs by the Visit date, enter the date value in the search field just below the heading 'Visit Date' and the system will show the desired results


To search/filter jobs by the Facility name, enter the keyword in the search field just below the heading 'Facility' and the system will show the desired results

To search/filter jobs by the Facility id, enter the id in the search field just below the heading 'Facility ID' and the system will show the desired results

To search/filter jobs by the Site name, enter the keyword in the search field just below the heading 'Site' and the system will show the desired results

To search/filter jobs by the Site id, enter the id in the search field just below the heading 'Site ID' and the system will show the desired results

To clear filters after performing search operation, click on 'Clear Filters' to bring back the original display of the jobs page.

To sort jobs by any of the listed fields, click on the  icon next to the specific field and jobs will be sorted as desired.

Job Details Page

User can access job details page directly by clicking on the job number. Jobs are listed on the on the Dashboard, sites page and on the Jobs page. Job details page can be accessed from any of these pages for the listed jobs.

Job details page display below listed information for that specific job;

- Job details
- Site details
- Lead Assessor details
- Received and submitted job documents

Job details, Site details and Lead Assessor details

Job Number: 077788 Planned			<div><div>1</div>Initiation</div> <div><div>2</div>Preparation</div> <div><div>3</div>Assessment</div> <div><div>4</div>Submission</div> <div><div>5</div>Decision</div>				
Job Details		Site Details			Lead Assessor		
Job Type	SRV	Site Name	Site 1 - Sydney laboratories		Name	John Blue	
Visit Date	2020-10-19	Site ID	025043		Phone	0234569087	
		Phone	0234560987		Email	john.blue@nata.com.au	
		Email	contact@abc.com.au				
		Address	7 Leeds Street				
		Suburb	RHODES				
		State	NSW, AU				

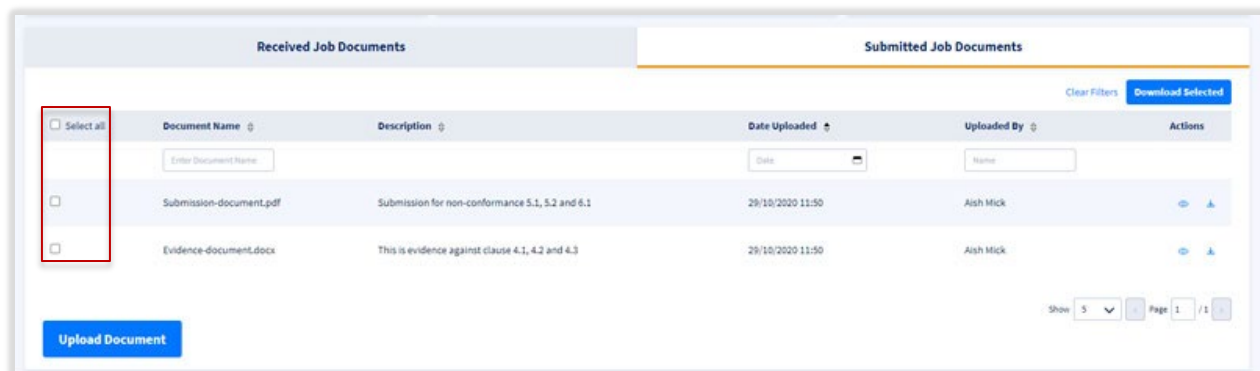
Job details including job number, job type and job stage are listed on the top of the page. As the job progress the job status and job stage information will be changed on the job details page. Every job goes through 5 stages; Initiation, Preparation, Assessment, Submission and Decision, as the job progress through different stages the information will be reflected on the jobs page.

Site details including site name, site id, phone, emails and address are displayed in its own panel just below the job stage information.

Lead Assessor details including lead assessor name, email id and phone number are listed next to the site details panel below the job stage information.

Received Job documents and Submitted Job documents

Every job will have received and submitted job document panels displayed on the job details page. User can switch between these two panels by just clicking on the panel heading. Active job document panel will be displayed with an orange underline as shown below;



Received Site Documents panel lists all the documents received from NATA, showing document name, description and date uploaded for every document listed.

Viewing and downloading documents

To preview a document, click on  icon

To Download a document, click on  icon

User can also download all or some of the selected documents by selecting the documents by ticking the checkbox on the left and clicking on the 'Download Selected' button. User can also select all the documents with one click using 'Select all' check box on the top.

Searching/filtering and sorting documents

To search a particular document enter the keyword in the document name search bar and as you entering the system will filter the documents for you. To search the documents by date uploaded.

Submitted Site Documents panel lists documents submitted by the user from the Portal. Every listing shows document name, description, date uploaded and uploaded by information.

Viewing and downloading documents

To preview a document, click on  icon

To Download a document, click on  icon

User can also download all or some of the selected documents by selecting the documents and clicking on the 'Download Selected' button.

Searching/filtering and sorting documents

User also have ability to search/filter a particular document by entering the keyword in the document name, date uploaded and uploaded by search fields.

Uploading Job documents

User can submit job related documents in the 'Submitted Job Documents' panel.

To upload a document, click on the 'Upload Document' button, a pop-up window for file upload will be shown. Click on Choose file and the system will load your file explorer; select the file you want to upload. System will ask you to check and confirm the document selected is the right one if it is click on 'Yes' or click on 'No' and select the right document. Once you select 'Yes', system will ask you to enter a small description (up to 299 characters), enter the description and click on 'Finish'. The system will perform a virus scan on the document and if no threats are found, it will list the document under 'Submitted Site documents'.

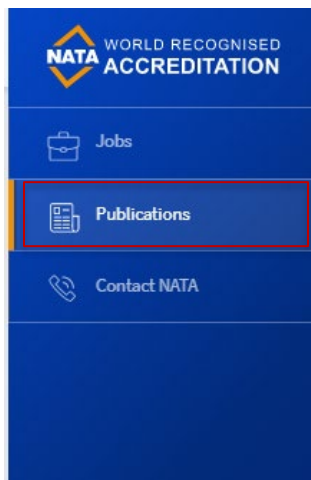
Please note once the file is submitted on the portal it cannot be removed by the user, only NATA staff have access to delete the submitted document.

To upload multiple file, zip them into 1 file and then upload. User can upload a file size of maximum 150MB.

The image displays three sequential screenshots of the 'File Upload' interface:

- First Screenshot:** A 'File Upload' window with a dashed box for file selection. It contains the text 'Drag and drop file to upload or' and a blue 'Choose file' button. A 'Cancel' button is at the bottom right.
- Second Screenshot:** A confirmation dialog titled 'File Upload' asking 'Are you sure this is the file you want to upload to Job 077788?'. It shows the file 'Submission-document.pdf 202.8 kB' and has 'Yes' and 'No' buttons. A 'Cancel' button is at the bottom right.
- Third Screenshot:** A 'File Upload' window showing the 'Details / Addressed Non-Conformances*' section. It includes a text area with the input 'Submission for non-conformance 5.1, 5.2 and 6.1', a file preview of 'Submission-document.pdf 202.8 kB' with a close icon, and 'Finish' and 'Cancel' buttons at the bottom.

3. Publications



The NATA Portal allows all users to access NATA Publications and manage notification subscriptions.

To navigate to Publications, click on 'Publications' in the left menu panel as shown in the image on the left

You will land on the Publications page with a view of Recently Updated Publications. Latest updated Publications can be viewed or downloaded from the recently updated Publications listing.

To preview a Publication, click on this icon



To Download a Publication, click on this icon



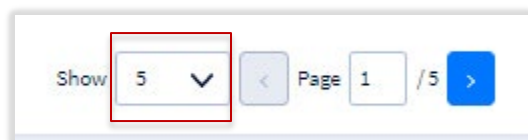
Publications

Recently Updated Publications

[Clear Filters](#)

Name	Date Updated	Actions
<input type="text" value="Search"/>	<input type="text" value="Date"/>	
User-Registration.pdf	2020-03-22 21:45:52	View Download
Life-Sciences-ISO-IEC-17025-Annex-Food-allergen-proteins-and-gluten.pdf	2020-03-18 01:42:17	View Download

By default, 5 latest updated publications will be listed but you can choose to see more by selecting a different option from the pagination drop down



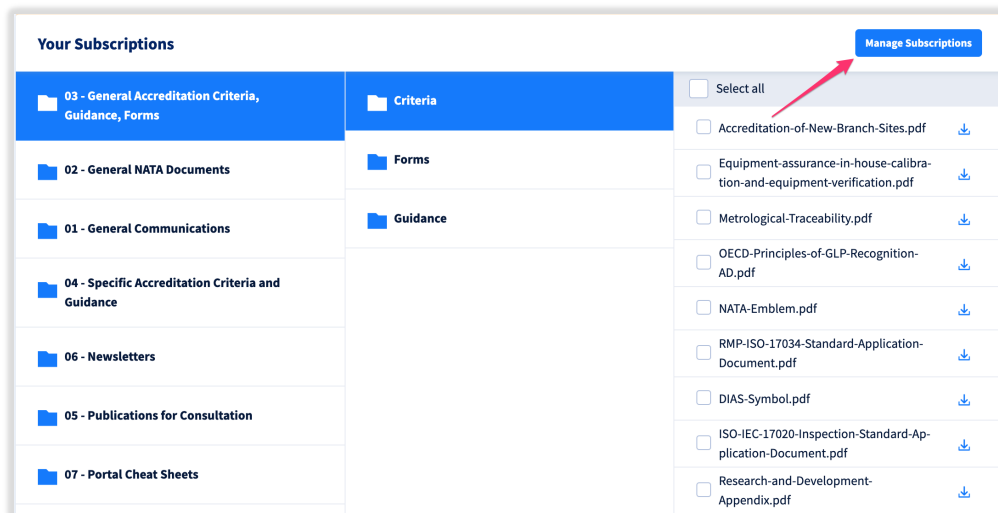
The list can also be searched and filtered by name and date. To search/filter by name type a search keyword in the search box just below the 'Name' label and press enter on the keyboard, the system must display the desired results. To search/filter by date type the desired date in the search box below 'Date Updated' label and press enter on the keyboard, the system must display the desired search results.



Your Subscriptions - Subscribing and Unsubscribing

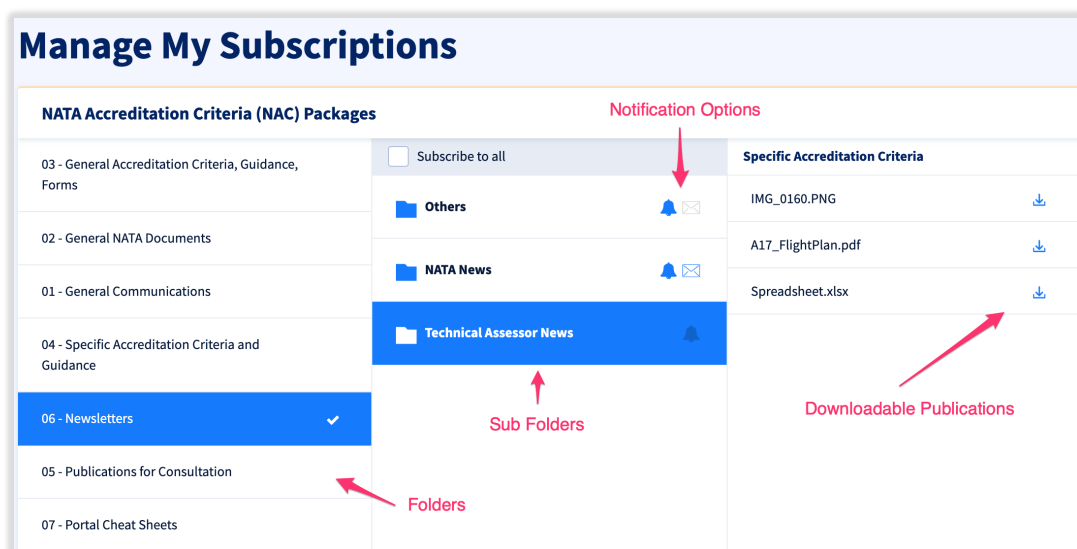
All Committee Members will have access to the full list of Publications. Your Subscriptions allows you to subscribe to publications for which you want to receive notifications.

Manage Your Subscriptions

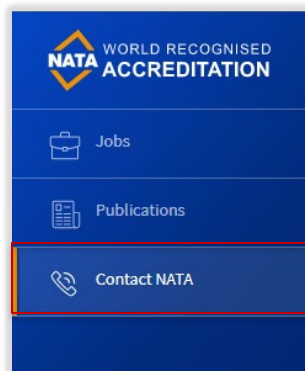
1. Scroll down to the Your Subscriptions section of the Publications page
2. Click on the Manage Subscriptions button located in the below image



3. View the Folders available. Navigate to the Folder to which you wish to Subscribe to receive notifications when a document in that folder is updated on the Portal.
4. Choose your Notification Options for Subfolders;
 - a. Select the bell icon  to receive a dashboard notification, similarly deselect to stop notifications
 - b. Select the Mail icon  to also receive email notifications on your registered email when Publications are uploaded in that sub folder, similarly deselect to stop email notifications.



4. Contact NATA



Portal users also have access to 'Contact NATA' form on the portal to submit any query from the NATA Portal. To access this page click on the 'Contact NATA' link on the left hand side menu.

The system will take you to the Contact NATA page showing the form. Enter subject and a brief description about your query in the 'What is your message about' data field and submit. Your query will be submitted to NATA and a confirmation for the same will be displayed on the screen.

General contact information including free call phone number, email, address and NATA website address is also listed on the right hand side of the page.