



NATA Portal – Technical Assessor Reference Guide

August 2024

NATA Portal - Technical Assessor Reference Guide

The NATA Portal is our preferred method for communicating job related information and documents with our Technical Assessors. Technical Assessors are requested to keep their profile information up to date using the portal.

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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Getting Started

Registration and password setup

Technical Assessors will be automatically registered to the portal as part of their welcome to NATA. Once registered, you will receive an email to set up a password for the NATA Portal login. Follow and complete the steps to set your password.

1. Click on the link in the registration email to set your password, system will show you the screen where you can enter your password.
2. Enter your chosen password and confirm and submit.
3. Next you will be asked to set up your 2 Step verification by entering your mobile number starting with country code +61 and no leading zeros +6140569XXXX.

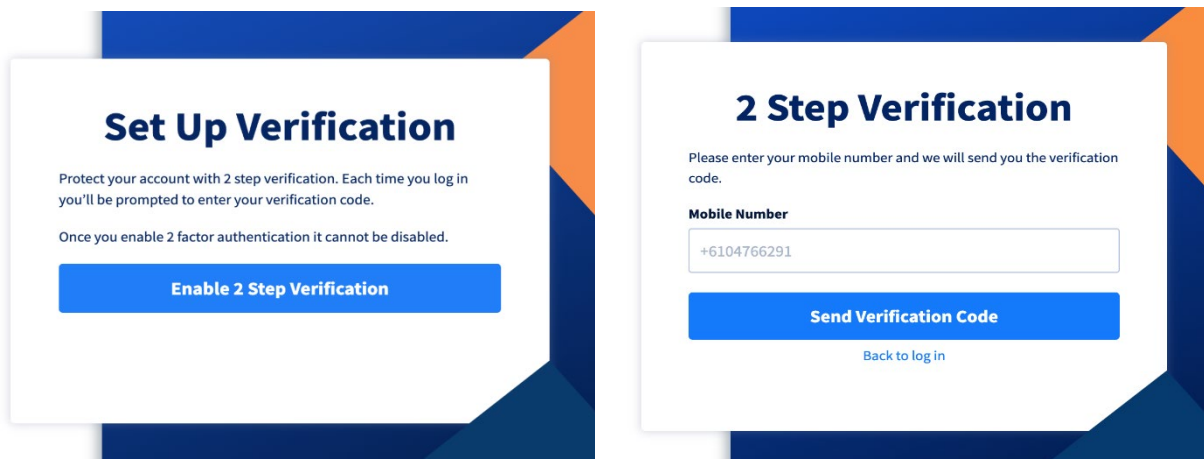
Setting up 2 Step Verification

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) or after 15 days when the verification expires if you choose the option to remember it for 15days.

Steps to setup 2 step verification

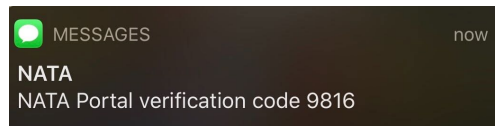
1. Using your email address and your newly set password, log in to NATA Portal. Here you will be presented with a Set Up Verification screen where you will be able to enable your 2 Step Verification (see image below).



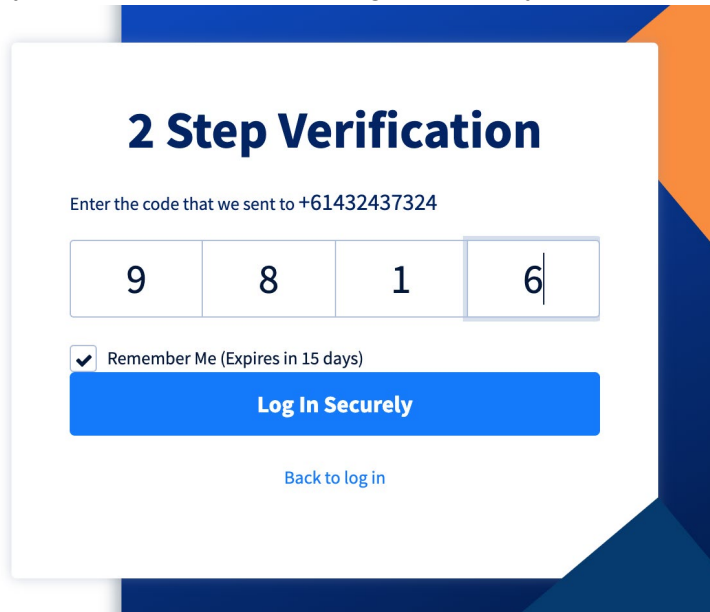
2. Click on '*Enable 2 Step Verification*' and enter your Mobile contact number in the correct format i.e. starting with country code +61 and no leading zeros +61405699876. You will

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then receive a Verification code to your mobile device as shown below



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



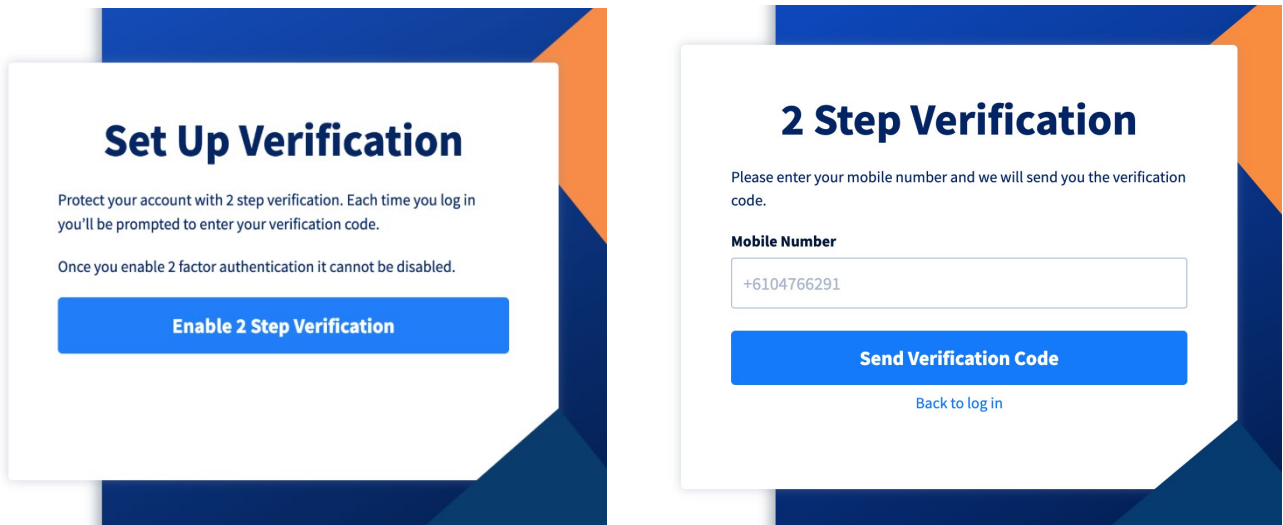
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Setting up your login password after your welcome link is expired

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.

If the link in your registration confirmation has expired, you can use the steps below to setup your password:

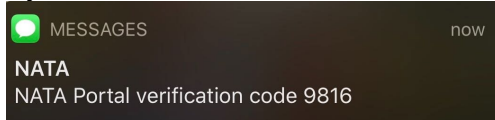
1. Visit <https://nataportal.nata.com.au/#/> and click on 'Click here to reset password link' just below the Log In button
2. Enter your registered email i.e. [XXXXX](#) and submit, this will send you an email notification to reset your password
3. Access the email and click on the button 'Reset your Password', ensure you are not opening the link in IE any other browser should work



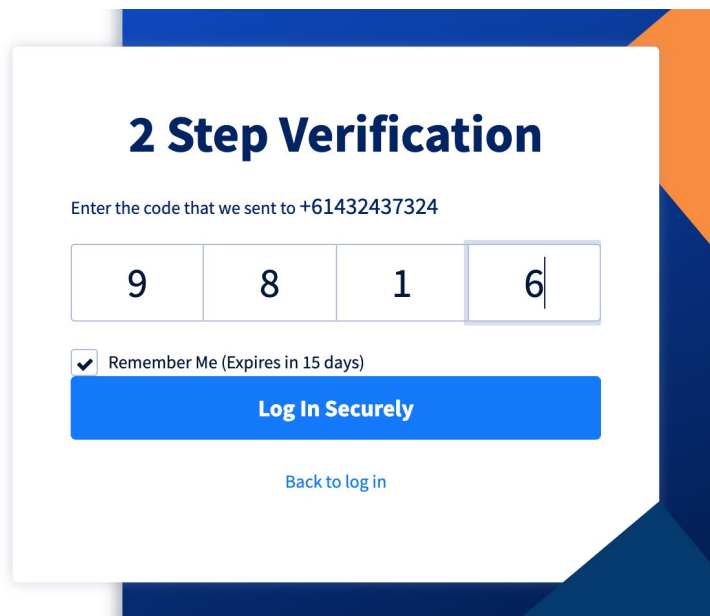
4. It will ask you to set your password, once you have done that the system will ask you to login using the email and password
5. On Successful login, it will ask you to set up 2 factor Authentication, click on the button 'Enable 2 Step Verification' to set that up.
6. You will be presented with a Set Up Verification screen where you will be able to enable your 2 Step Verification (see image on the right)
7. Enter your Mobile contact number in the correct format i.e. starting with country code +61 and no leading zeros +61405699876.

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8. System will send a Verification code to your mobile device as shown below



9. Enter the 4-digit code as shown below and click on 'Log-in Securely' to login into the NATA Portal.

A screenshot of the NATA Portal login interface. The page has a white background with blue and orange decorative elements. At the top, it says "2 Step Verification" in bold blue text. Below that, it says "Enter the code that we sent to +61432437324". There are four input boxes containing the digits "9", "8", "1", and "6" in order. Below the input boxes is a checkbox labeled "Remember Me (Expires in 15 days)" which is checked. At the bottom, there is a blue button labeled "Log In Securely" and a link labeled "Back to log in".

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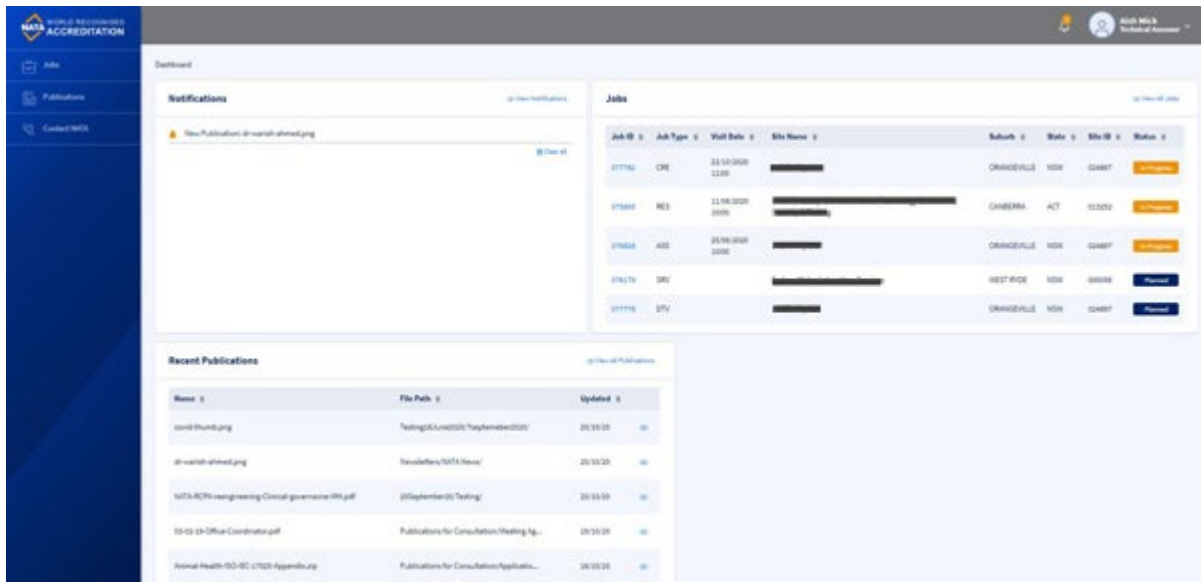
Accessing Dashboard


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.



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.

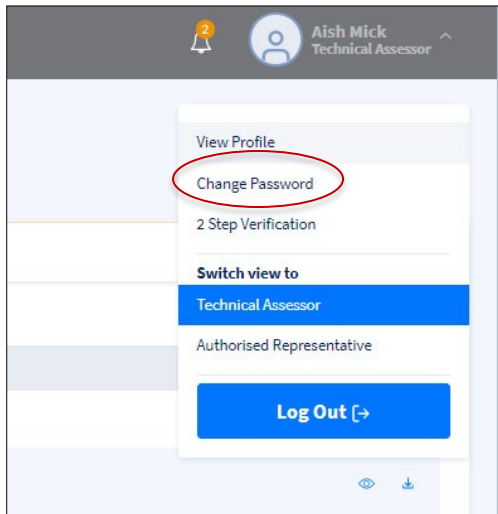
Dashboard > Contact NATA

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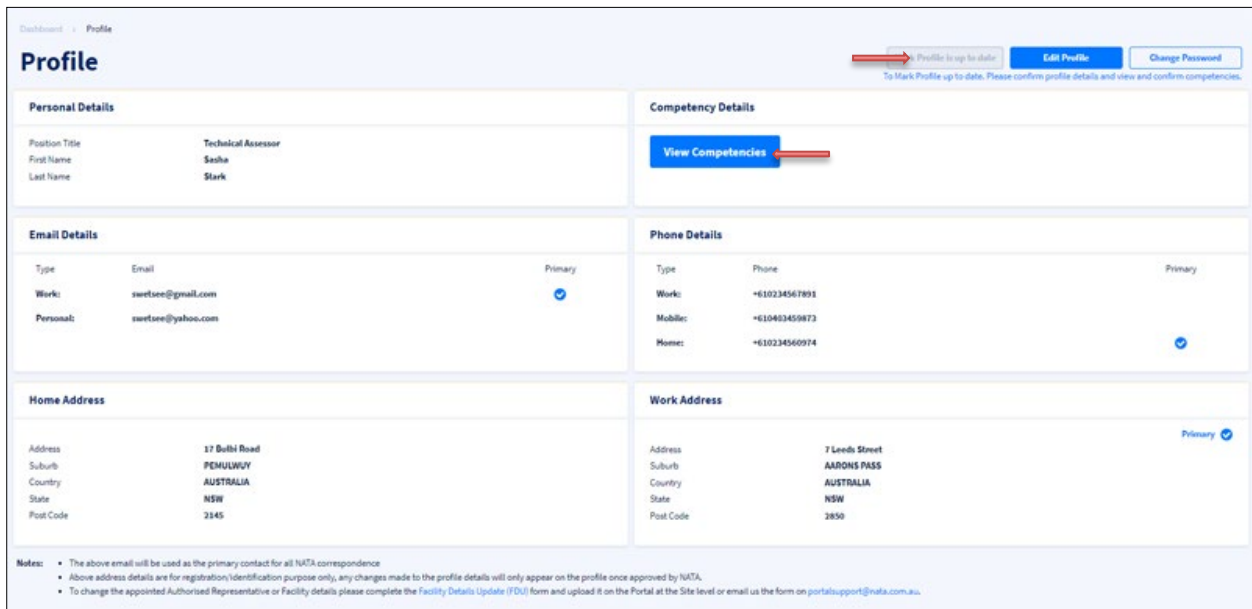
Marking Profile information as up-to-date

Periodically, NATA will contact you to confirm your profile details. Once you have reviewed all the current profile information in the portal and if no changes are required, you will be able to mark your profile as up-to-date.

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



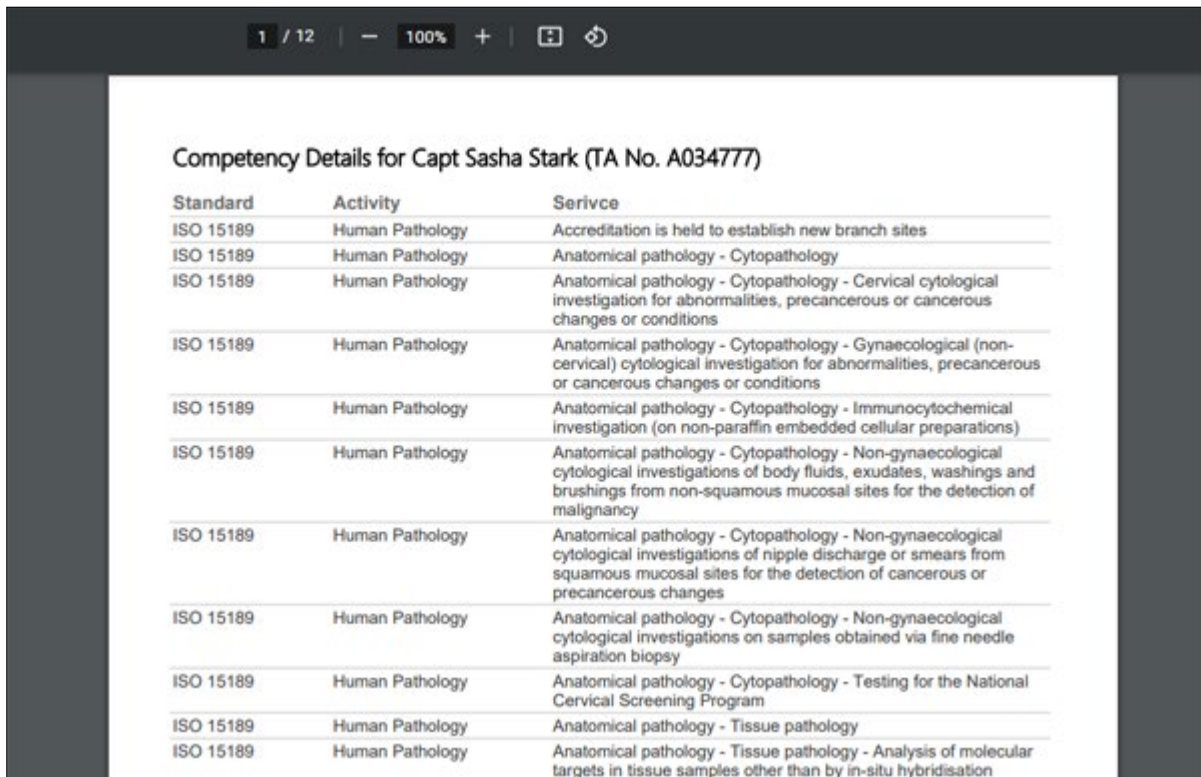
Once you click on the 'View Profile' menu item the system will load all the profile information you have registered with us.



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

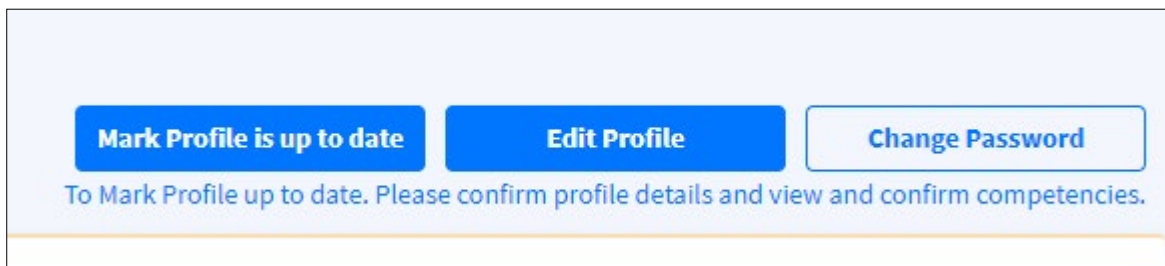
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a new window if you are using Google Chrome or download the PDF into your downloads folder on your computer if using Microsoft Edge browser.



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.



[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 cheat sheet.

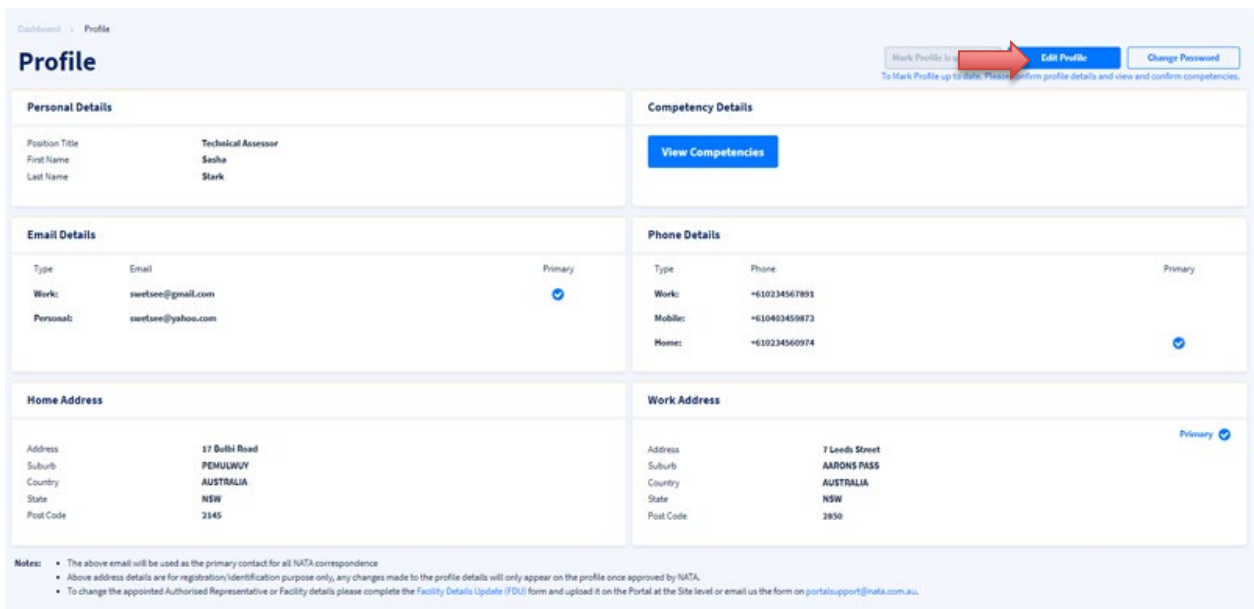
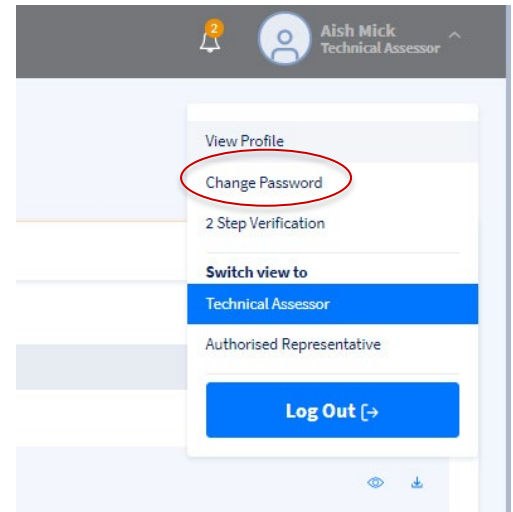
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View and Edit Profile Information

Users can view their profile information on the NATA Portal. If there are any changes required to be made to your profile, you can edit the profile information and submit it for approval. Once approved by NATA users will be able to see the updated information on the profile.

To view and 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.



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.

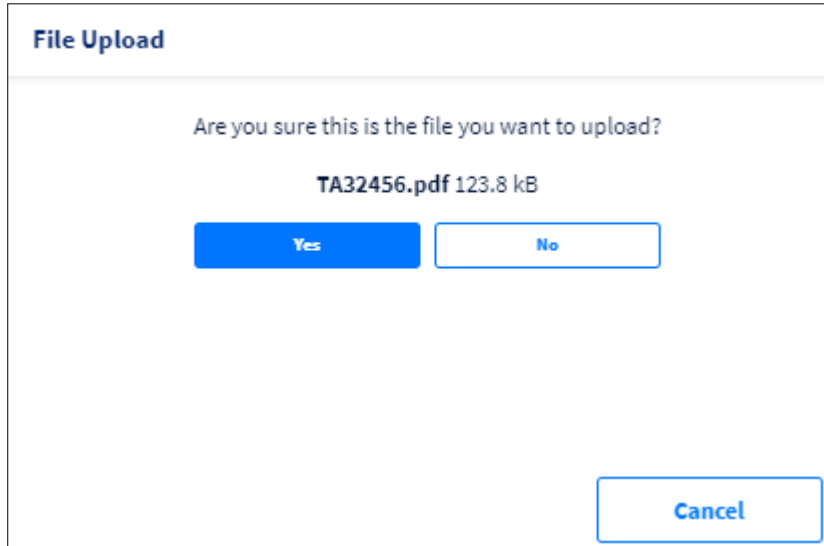
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5. You will also be able to change your primary contact details by clicking on the radio button listed next to the field. You must have at least one type of email, phone and address marked as 'Primary' to let us know your preferred email, phone and 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.
6. 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.

7. 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.

8. 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.

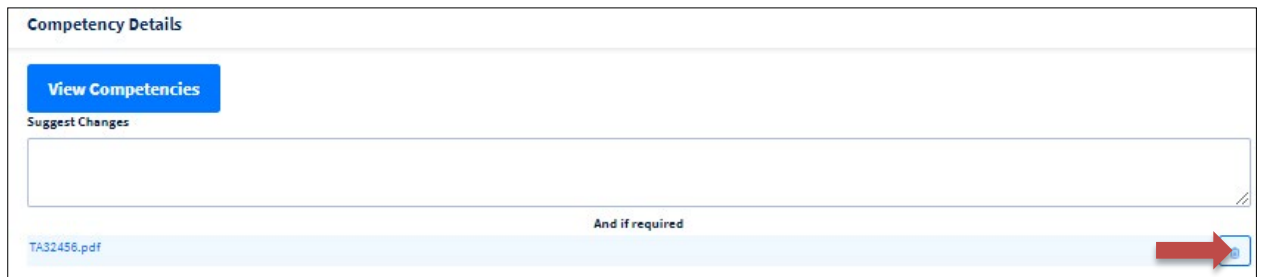
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File Upload

Are you sure this is the file you want to upload?

TA32456.pdf 123.8 kB



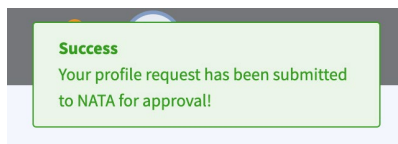
Competency Details

Suggest Changes

TA32456.pdf

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.

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



Please note: Any profile changes suggested by you will not be reflected immediately as these are subject to approval by the NATA. 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 made.

You will be contacted if a request to make profile changes is rejected.

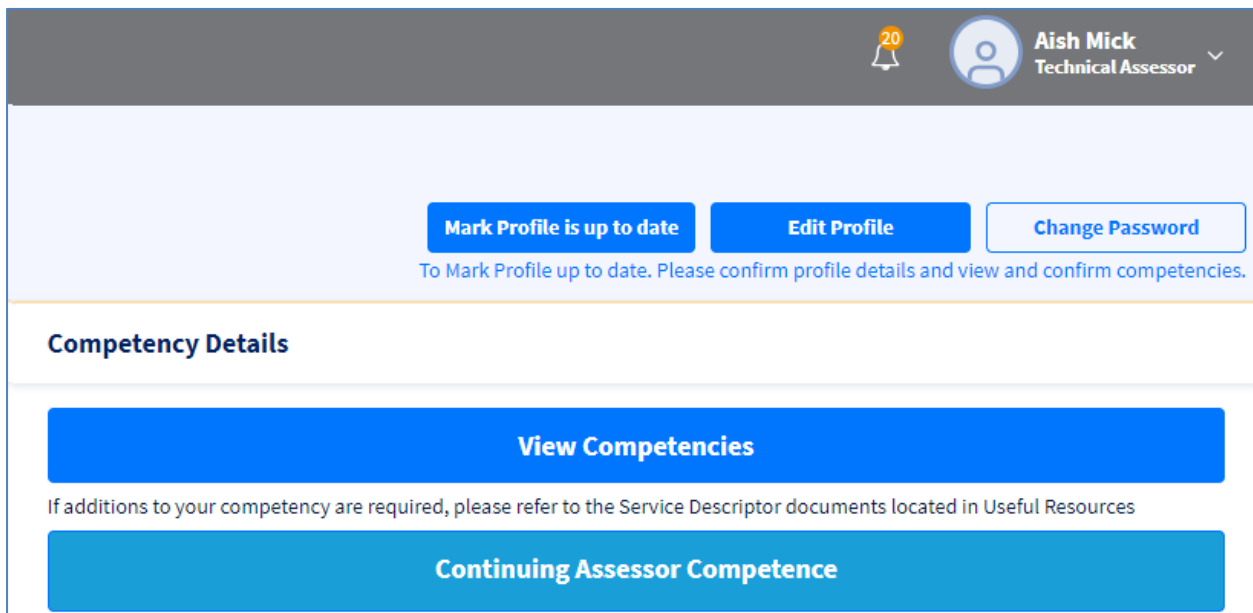
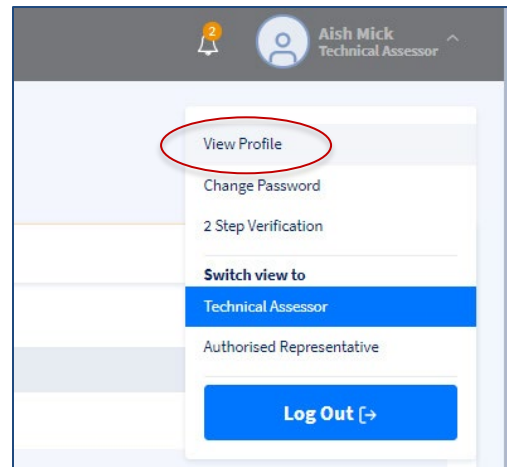
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Acknowledging Continuing Assessor Competency

As part of our commitment to maintain the highest standards of service and compliance, NATA continuously seeks to ensure that our peer review process is supported by our Volunteer Technical assessors with the most current and relevant expertise in their respective fields.

Periodically, all our Technical Assessors will be requested to acknowledge the up-to-date status of their competency as a NATA technical assessor. TA's will receive a reminder from the portal every 2 years to perform this action and will be able complete it within the NATA portal using the steps below:

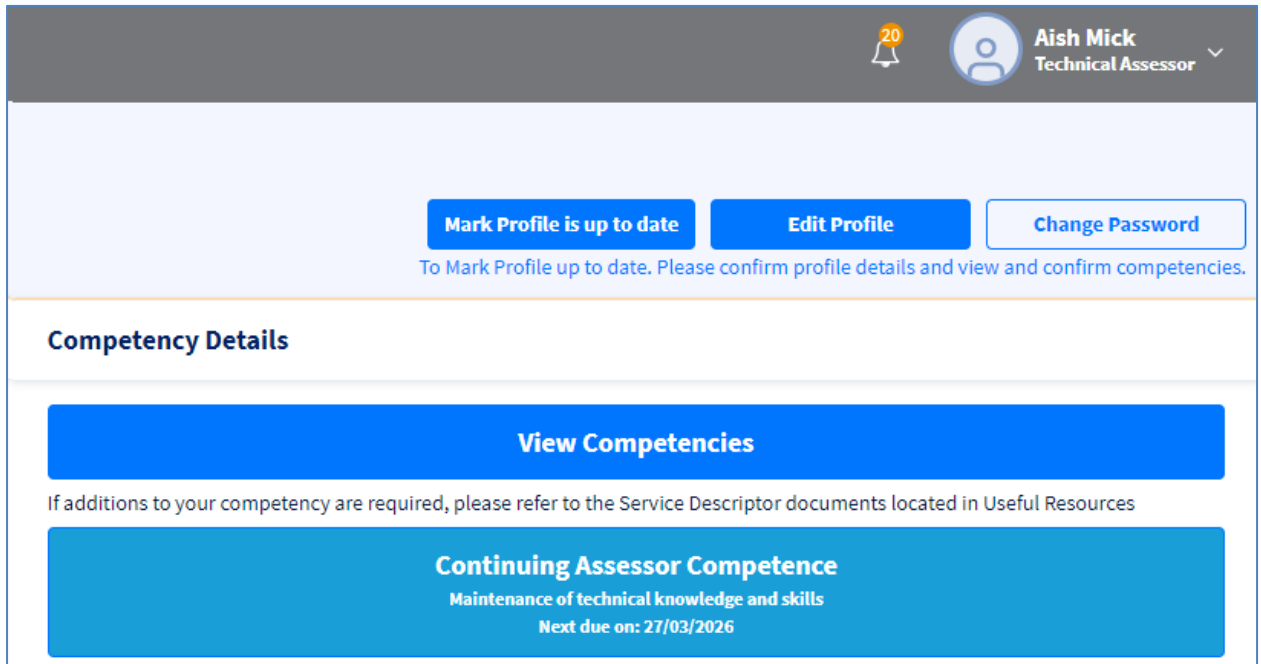
1. Once you have logged in to the NATA Portal, click on your profile name at the top right corner of your screen.
2. A dropdown as shown below will appear, click View Profile.
3. You will then be directed to your Profile Page where you will be able to see all your profile information including a blue button 'Continuing Assessor Competency' as shown below in the picture.



4. Click on the 'Continuing Assessor Competency' button, the system will load a pop window with few options to select and acknowledge how technical competency has been maintained.

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5. Select the appropriate options and click on 'Submit' button, you must select at least one option.
6. As soon as you submit your acknowledgment, the 'Continuing Assessor Competency' button will be updated with when its next due as shown in the pic below:



The screenshot shows the user interface for a Technical Assessor. At the top right, there is a notification bell icon with the number 20, a user profile icon for 'Aish Mick', and the title 'Technical Assessor'. Below this, there are three buttons: 'Mark Profile is up to date', 'Edit Profile', and 'Change Password'. A note below the buttons states: 'To Mark Profile up to date. Please confirm profile details and view and confirm competencies.' The main content area is titled 'Competency Details' and features a large blue button labeled 'View Competencies'. Below this button, a message reads: 'If additions to your competency are required, please refer to the Service Descriptor documents located in Useful Resources'. At the bottom, there is a light blue box titled 'Continuing Assessor Competence' with the subtitle 'Maintenance of technical knowledge and skills' and the text 'Next due on: 27/03/2026'.

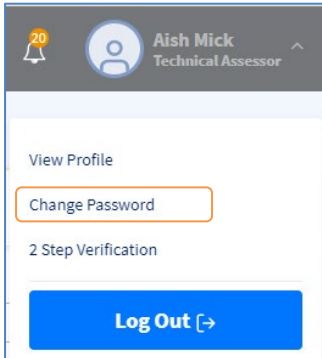
7. When you are approaching the due date, an automatic notification will be generated from the system to remind you to complete the acknowledgement again.

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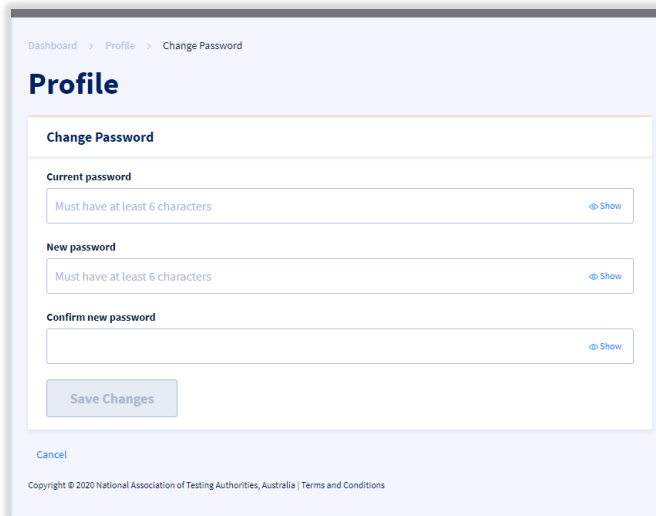
Change Password after login

You can change your password once you are logged in to the portal by using the steps below:

1. click on the 'Change Password' option from the drop-down profile menu as highlighted in the below image.



2. The system will load up the below screen where you will have to enter the current password and the new password twice to confirm and save the changes.



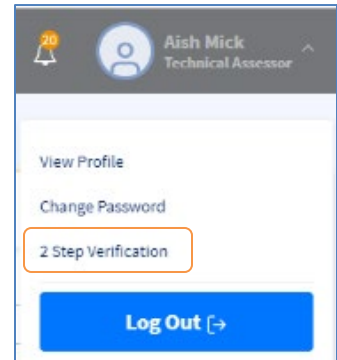
3. Once the changes are saved, you can start using the changed password for logging in-to the Portal.

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Change 2 Step Verification details

If your mobile number gets changed, you can update your mobile number for the 2-step verification process from your profile by using the steps below:

1. Login to NATA Portal using your email and password
2. Once logged in, click on the profile icon on the right-hand corner to load the drop-down menu
3. Click on the '2 Step Verification' from the profile drop down menu as shown below, and the system will load the screen to change your 2 step verification details.
4. Enter the new mobile number prefix with +61 and click on 'Send Verification Code'.
5. The system will send a code to your updated mobile number, enter the code and submit.
6. The mobile number will be updated for 2 step notification on your profile.

A screenshot of the '2 Step Verification' form. The title is '2 Step Verification'. Below the title, it says 'Please enter your mobile number and we will send you the verification code.' There is a text input field labeled 'Mobile Number' containing the value '+61434678075'. Below the input field is a blue button labeled 'Send Verification Code'. At the bottom left, there is a 'Cancel' link. At the bottom, there is a copyright notice: 'Copyright © 2020 National Association of Testing Authorities, Australia | Terms and Conditions'.A screenshot of the '2 Step Verification' form. The title is '2 Step Verification'. Below the title, it says 'Enter the code that we sent to'. There are four input fields containing the digits '1', '8', '5', and '7'. Below the input fields is a blue button labeled 'Submit'. Below the 'Submit' button is a 'Cancel' link. At the bottom, there is a copyright notice: 'Copyright © 2020 National Association of Testing Authorities, Australia | Terms and Conditions'.

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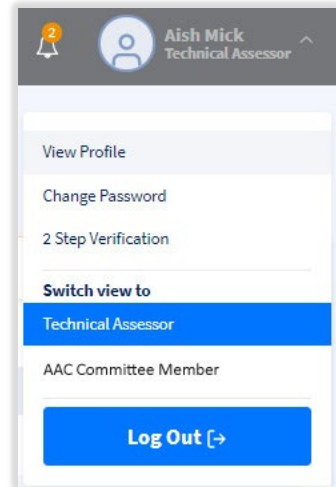
Switching Roles (If you are registered for more than 1 role)

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.

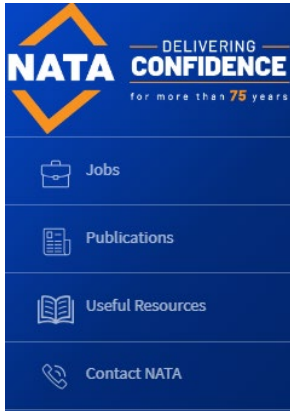
To switch profile and view the data related to other profile:

- 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.
- You will now see information related to the switched role.



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Jobs - Job details and Job documents



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 for jobs by entering a keyword in the search box or by selecting the desired value from the drop down if applicable.

The screenshot shows the 'Jobs' page in the NATA Portal. It features a table with columns for Job ID, Job Type, Status, Visit Date, Facility, Facility ID, Site, and Site ID. Each column has a search box and a dropdown menu. The table contains four rows of job data. At the bottom right, there are pagination controls showing 'Show 20' and 'Page 1 of 1'.

Job ID	Job Type	Status	Visit Date	Facility	Facility ID	Site	Site ID
07786	SRV	In Progress	19/10/2020 11:00	ABC Facility Pty LTD	020855	Site 1 - Sydney Laboratories	025043
07786	ARE	In Progress	27/06/2020 10:00	ABC Facility Pty LTD	020855	Site 1 - Sydney Laboratories	025043
07787	OTV	In Progress	07/06/2020 10:00	ABC Facility Pty LTD	020855	Site 1 - Sydney Laboratories	025043
07786	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

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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.

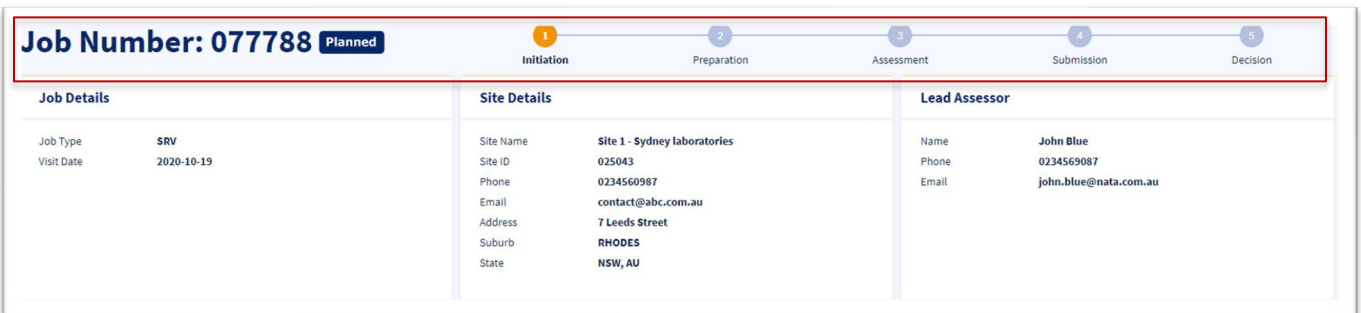
Accessing Job Details Page

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

The 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		1	2	3	4	5
		Initiation	Preparation	Assessment	Submission	Decision
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

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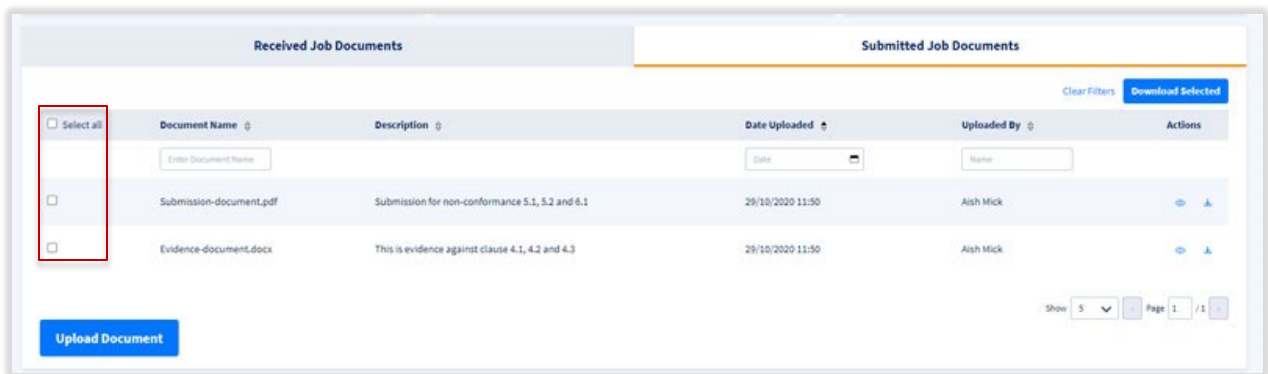
Decision, as the job progress through different stages the information will be reflected on the jobs page.

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

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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 related documents

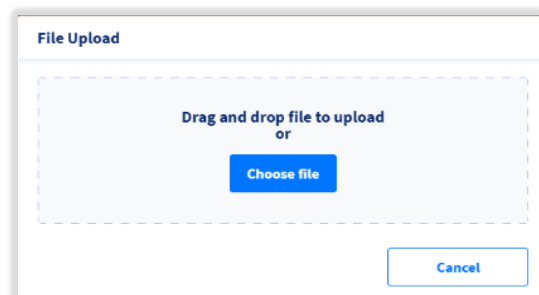
Users can submit job related documents in the 'Submitted Job Documents' panel on the Jobs page. While accessing the job details page, by default the users will see the 'Received Job Documents' tab where all the documents uploaded by NATA will appear.

Click on 'Submitted Job Documents' heading to view the area where you can upload documents as shown below:



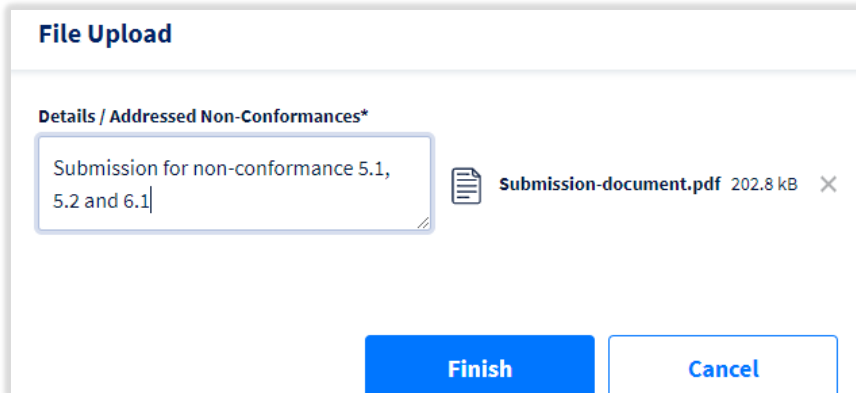
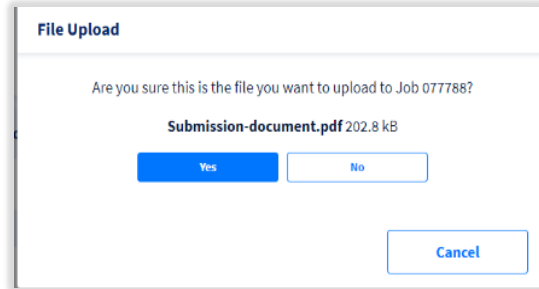
To upload a document',

- 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.



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- The 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', the system will ask you to enter a small description (up to 299 characters), enter the description and click on 'Finish'.



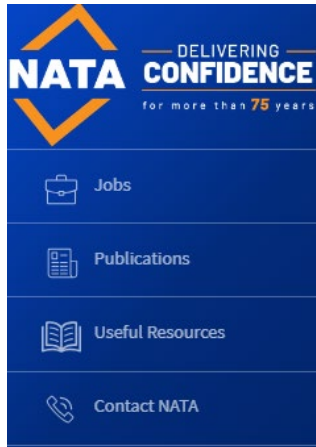
- The system will perform a virus scan on the document and if no threats are found, it will list the document under 'Submitted Site documents'.

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 files, zip them into 1 file and then upload. Users can upload a file size of maximum **150MB**.

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Publications and Subscriptions



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. The 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 

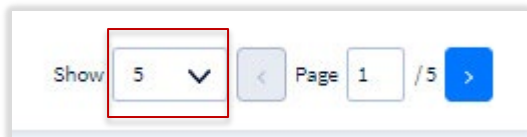
Publications

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	 
Life-Sciences-ISO-IEC-17025-Annex-Food-allergen-proteins-and-gluten.pdf	2020-03-18 01:42:17	 

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 in the search box below 'Date Updated' label and press enter on the keyboard, the system must display the desired search results.

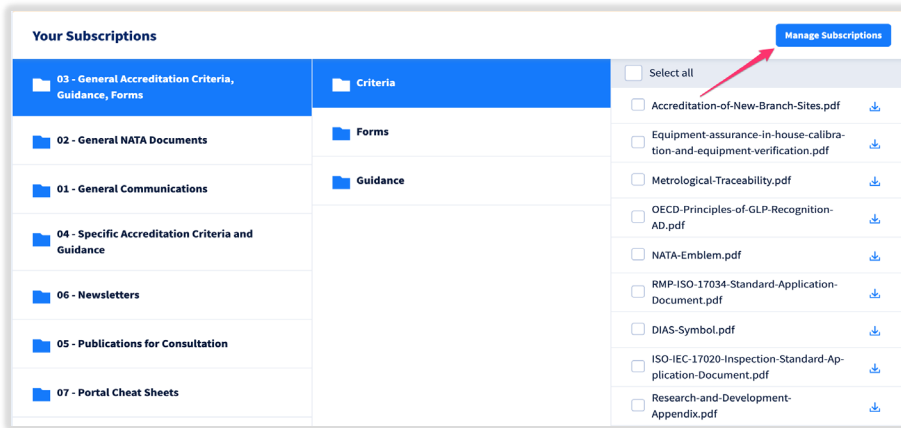
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Publication Subscriptions for notification

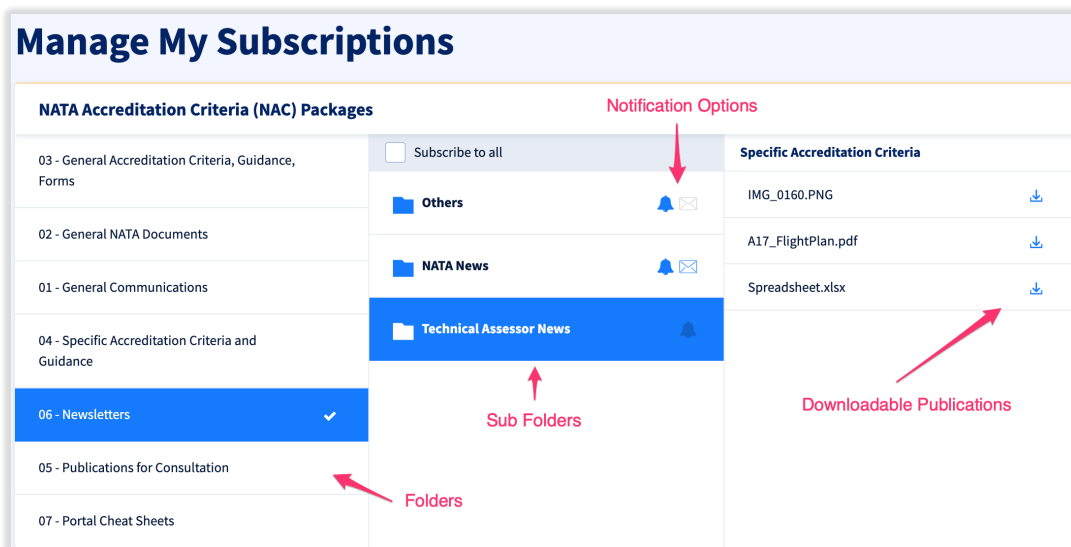
All Members will have access to the full list of Publications. Your Subscriptions allows you to subscribe to publications for which you want to receive notifications.

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.




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Useful Resources



All Technical Assessors have access to the Useful Resources section on the NATA Portal. This can be accessed by clicking on the 'Useful Resources' tab on the left-hand side menu once logged into the portal.

Technical Assessors will be able to access several resources, training materials, NATA Portal user guides, forms and more in this section.













To access the listed resources, click on the eye icon  on the right to view the more details.

Dashboard > Useful Resources

Useful Resources

Resources, Training Material, User guides and more

[Clear Filters](#)

Type	Name 	Date Updated 	Actions
	<input type="text" value="Search"/>	<input type="text" value="Date"/>	
	Expense Claim Form	24/07/2024 09:34:38	
	SAI Global Website	22/08/2023 09:34:38	
	Information Security Awareness	21/08/2023 09:34:38	
	Technical Assessors - User Reference Guide	23/05/2023 23:34:38	
	Enhanced Funtionality on the Portal	24/05/2023 23:34:48	

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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 will be displayed on the screen.

A screenshot of the 'Contact NATA' form page. The page has a light blue header with a breadcrumb 'Dashboard > Contact NATA' and a user profile 'Aish Mick Technical Assessor'. The main content area is titled 'Contact NATA' and contains a 'Send us an email' section. This section includes a note: 'You can use this page to send us any changes that you need to be made to your account or to ask us any questions. When asking for changes, please list what you would like changed in as much detail as possible.' Below this is a text area with a warning icon and the text: 'Please note that any changes made will have to be approved by NATA before being applied to this portal.' There are two input fields: 'Subject' and 'What is your message about?'. A blue 'Send' button is at the bottom of the form. To the right of the form is a 'Get in Contact' sidebar with contact information: '1800 621 666 (free call)', 'portalsupport@nata.com.au', '7 Leeds St, Rhodes NSW 2138', and 'www.nata.com.au'. At the bottom left of the page, there is a small copyright notice: 'Copyright © 2020 National Association of Testing Authorities, Australia | Terms and Conditions'.