Online Work Submission (via APHA's IT system – Sam)

Official Veterinarian Practice Guide

December 2020 – Version 10

Contents

Section 1 - Using this Guide

This guide explains how to use Sam to arrange visits, record and submit results for Tuberculosis (TB) testing completed both on behalf of Animal and Plant Health Agency (APHA), and privately. It does not replace any field instructions or training which has previously been provided, other than the changes to completion and submission of TB testing paperwork.

It also explains how to use Sam to report completion of other work commissioned by APHA via Veterinary Delivery Partners, including TB testing of non-bovine species.

Section 6 provides a process overview in the form of a flowchart. This should be used to understand the general TB end-to-end process, and will assist you to use the system and this guide.

The guide is written in a modular format therefore it may be necessary to skip back and forth occasionally, for example; when adding or removing animals, completing part tests or for privately arranged testing.

Please Note: All system screenshots within this guide are subject to change.

Section 2 – Definitions

APHA	Animal and Plant Health Agency
CTS	Cattle Tracing System
Customer	Client, Customer or Livestock Keeper.
Delivery Partner	Regional business contracted by APHA to manage & deliver veterinary services
Government Gateway	The online portal through which users must register and login to in order to access Government I.T systems.

Group	Very specific location or a distinct 'group' of animals. Cattle on a farm are sometimes separated into distinct groups (with previously written approval by APHA).
Livestock Unit	Cattle Herd
My Work	An Official Veterinarians personal list of work in Sam. In the **My Work** view an Official Veterinarian will find tests specifically allocated to them.
OAI	Official Animal Identification.
OV	Official Veterinarian (Practice Vet).
OV Practice	Official Veterinarian Practice
Part Test	Used when not all of the eligible animals have been tested on the same day.
Practice Work	In the **Practice Work** view you will find all tests allocated to, or created by, the OV Practice.
Sam	The I.T system used to manage Tuberculosis testing.
"Signing"	The "signing" of a test is the action of an OV submitting the results to APHA. This replaces the need for a paper test chart and physical signature.
Status	When entering results for a test or part, each animal must be assigned a Status of 'Not Tested', 'Confirmed Clear' or 'Enter Reaction Details'.
TB	Tuberculosis.
Test	A TB test allocated by APHA to the OV practice to carry out, or a private TB test created and arranged by the OV practice.
Test Performer	The OV performing the TB Test.
Unallocated Test	A TB test that is not allocated to any particular Veterinary Practice, and therefore does not initially appear in the **Practice Work** view.
WSA number	Work Schedule Activity number. A unique reference used by APHA to identify TB tests or other work. This may be required when speaking to APHA and searching for unallocated tests.
Working Form	This is the existing TB52 'Cow Side' Form.

XML	Extensible Markup Language. The format of the file used to transfer information between Sam and 3rd party software.

Section 3 – Viewing Practice Work

Initial Logging in

As an Official Veterinarian (OV) you will be taken to the **My Work** view when you login. An OV will have access, via the tabs at the top left of the screen, to the **Practice Work** view and the **Search** tab, Select the **Practice Work** tab to be taken to this view.

As a member of Practice Administrative Staff you will be taken to the **Practice Work** view; you will also have access to the **Search** tab.

Work managed by a Delivery Partner will appear in an OV Practice view after the Delivery Partner transfers it to an **OV Practice** view or directly to an OV's **My Work** view.

The **Practice Work** view should be checked regularly for new work which may require urgent attention. This view displays the tests that are allocated to the OV practice.

For TB tests a test notification letter is also sent from APHA informing the Customer of the requirement for a TB test (with the exception of privately arranged tests). Brief descriptions of the main areas of the **Practice Work** view are provided below.

Notes:

1. When work has been assigned to an individual OV within the OV practice it will appear in their

2. **My Work** view. *Refer to Section 7 for guidance on assigning and re-assigning work.*

3. The "Alloc Date" column shows the date the work arrived at the OV Practice

4. **Search** for previously submitted work, current work and unallocated work. *Refer to Section 19 for further information.*

5. Initially all work allocated to the OV practice is listed on the **Practice work** tab, over multiple pages where necessary – 20 work items are listed per page. Select subsequent pages from the **Rows** drop-down (**8. Paging**).

6. **Filters:** The work listed can be filtered to assist in locating individual items*. Refer to Section 4 for guidance on using filters.*

7. Where APHA have included **Special Instructions** for a TB test this field will indicate that instructions exist - displaying the first few words of the instruction. The full instructions can be found in the **Special Instructions** box once the test has been opened.

8. **Create TB Tests:** Tests can be created for privately arranged testing, such as pre-movement tests using this function. *Refer to Section 15 for further information.*

9. **Log Off:** Whenever a session on Sam is finished users must log off using this button.

10. **Paging:** Where the number of tests runs to multiple pages (20 tests per page), they can be navigated here.

To avoid data loss, do not use the Internet Explorer Forward, Back or Close buttons. Always use the functionality within Sam to navigate and exit the system.

For security reasons Sam has an automatic time-out function. A pop-up message will be displayed if no activity has been detected for 25 minutes. After the warning has been displayed if there is no activity for a further 4 minutes then the user will be logged out of Sam. *Inactivity* is described as periods when there is "no server interaction" i.e. the user stays on the same page. Note: moving between tabs does *not* create a server interaction.

Any unsaved data will be lost if the user is automatically logged out.

Section 4 – Sorting and Filtering Practice Work

In the **Practice Work** view, users may filter the list of work using various parameters, and also sort the tests by any column heading. Wildcards can be used in the filters to increase the search boundaries.

1. Filtering Practice Work

These steps also apply to the **My work** view

Practice Work can be filtered on;

- Customer Name
- CPH
- Due From / Due To dates (e.g. for work due within a certain date range)
- Work Area (e.g. Tuberculosis, Brucellosis or Anthrax
- WSA-ID
- Delivery Partner

For example, if filtering for the Customer "Jones";

➢ Enter "Jones" in the Name filter.

Submit ➢ Click to filter the **Practice Work** view.

All work with the Customer name of "Jones" are displayed.

20 results are displayed per page. If there are more than 20 results, pages can be navigated using the paging function.

2. Using Filter Wildcards

A wildcard can be used to widen the parameters of a filter;

- "%" – Searches for an unspecified number of characters.

- "?" or "_" Searches for a single character. For example,
➢ Enter "Jon%" in the Name filter.

All tests with a Customer name beginning "Jon" are displayed (e.g. "Jones", "Joneson", "Jonston"). Enter "Jon%" in the Name filter.

3. Clearing Filters

Click Clear Filters to reset all of the search filters, and to revert the Practice Work view to default settings.

All tests with a Customer name beginning "Jon" are displayed (e.g. "Jones", "Joneson", "Jonston")

4. Sorting Practice Work

The Practice Work can also be sorted by selecting the column headings. This will sort them into ascending/descending order.

For Example:

Select the Alloc Date column heading.

The tests will now be sorted in ascending order of Issue Date.

Select the column heading again to reverse the sort order. The tests will now be sorted in descending order of Issue Date.

5. Viewing an individual's OV's work

Practice Admin and OVs can view any OV's work;

➢ In the Transfer From drop down list (bottom of the Practice work view), select "OV".

➢ Select the relevant OV's name from the list.

➢ Click Refresh Worklist . A list of work assigned to the selected OV will be displayed (in their My work tab)

➢ To return to a view of work allocated to the OV practice, in the Transfer From drop down list, select "Practice Work".

Sam may take several seconds to respond to selections made to the Transfer From selection – Please be patient.

Section 5 – Viewing Individual TB Tests

To view an individual TB test, click anywhere on the relevant test row in the **Practice Work** view. A new screen will open with detailed information relating to that test.

Brief descriptions of the main tabs and functions are provided below.
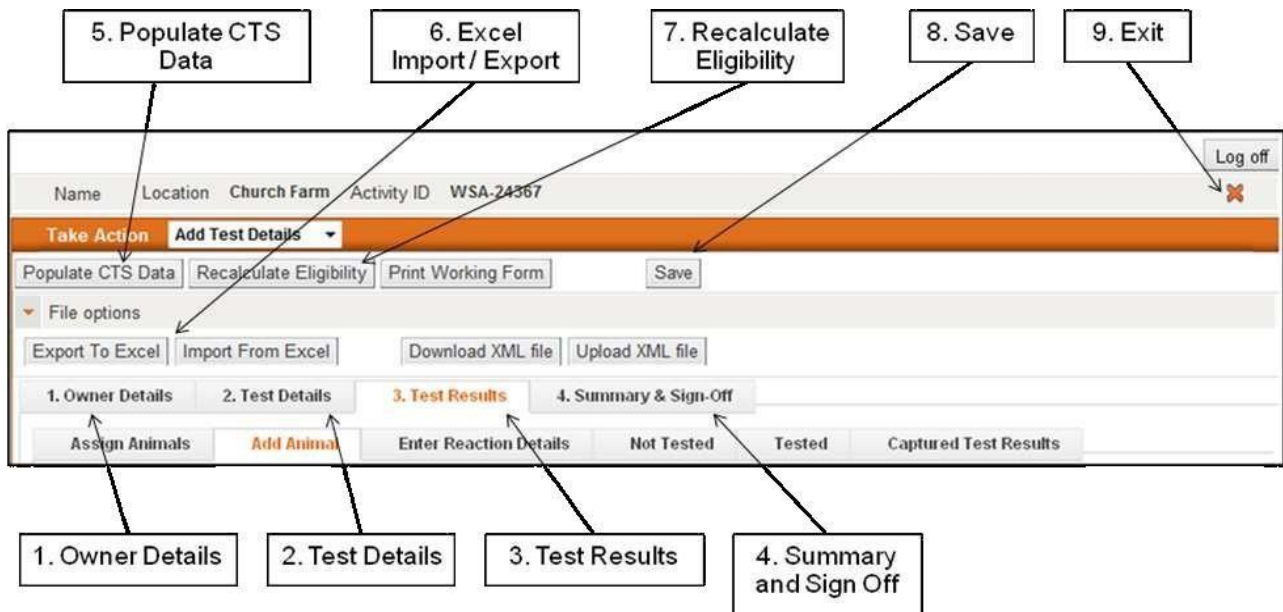
1. **Owner Details:** Displays Customer information e.g. name, address, contact number, CPHH.

2. **Test Details:** Testing information is recorded including arranged/completion dates, test performer and expense claims.

3. **Test Results:** Multiple tabs for the recording of test results, addition of animals etc.

4. **Summary & Sign Off:** Summarises test results, test data is checked and results are "signed".

5. **Populate CTS Data:** Downloads a list of eligible cattle on the holding from the Cattle Tracing System (CTS).

6. **Export to / Import from Excel** tabs: Exports the details of the test including the animal list into an Excel spreadsheet, to allow the capture of test details off-line. When testing information and results have been captured in Excel they can be imported back into Sam.

7. **Recalculate Eligibility:** Recalculates the eligibility of animals for testing based on proposed testing date.

8. **Save:** Saves information entered at any time.

9. **Exit:** Clicking on the red **X** returns the user to the **Practice Work** view. Ensure any new data entered is saved before selecting.

Section 6 – TB Process Overview

The flowchart below displays the process involved with receiving, arranging and submitting results for TB testing using Sam. Each step in the process has a corresponding chapter in

this guide. Some steps may not always be available or required; these are designated by a dotted line.

For simplicity, the flowchart follows the most common scenario; therefore on occasion it may be necessary to deviate from the exact sequence. For example, there could be a requirement to add animals at several stages during the life cycle of a test.
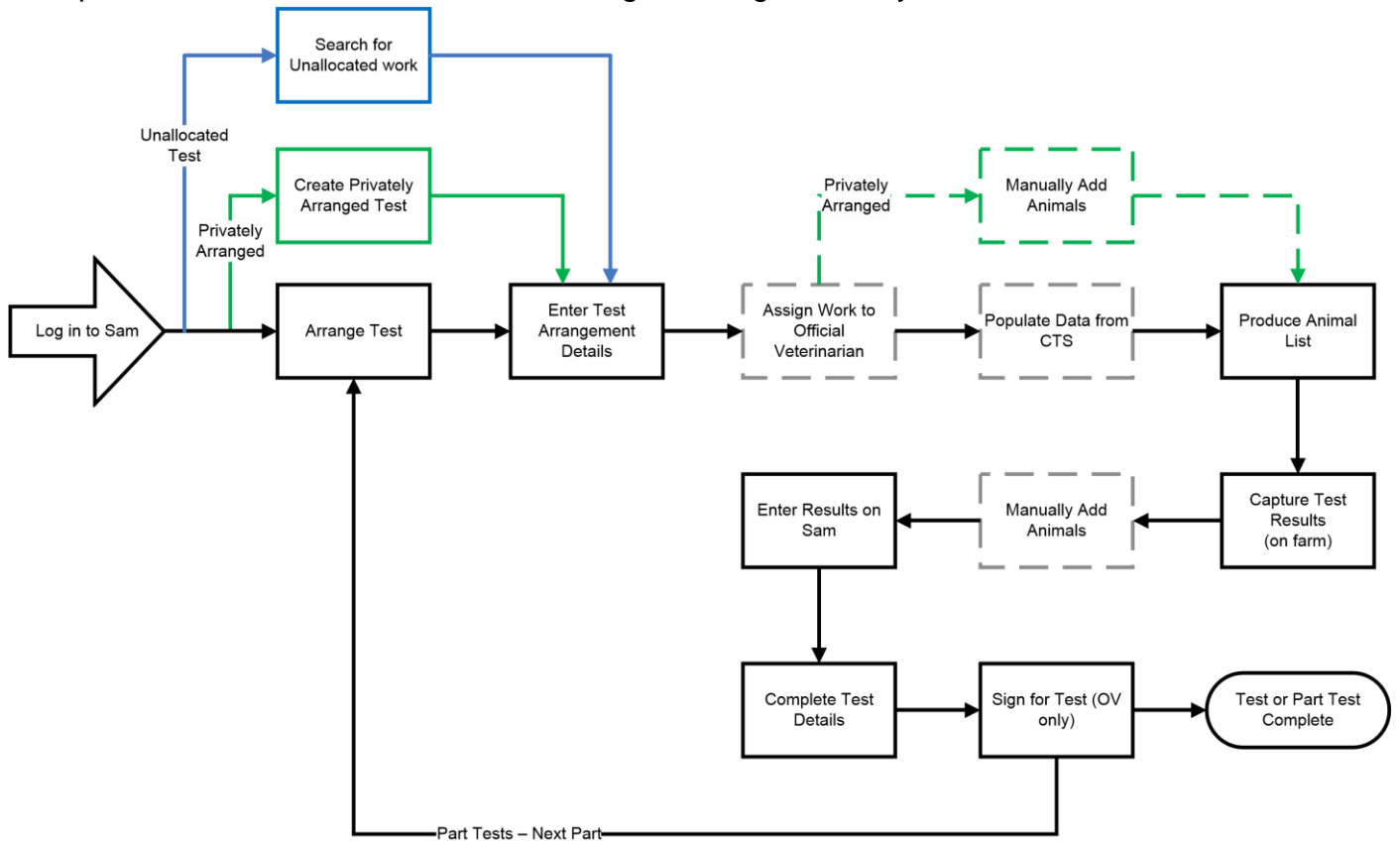
Section 7 - Transferring Work (including returning to Delivery Partner)

This guidance should be followed if work is required to be transferred either:

- From the **Practice Work** view to an OV's **My Work** view.

- From an OV's **My Work** view back into the **Practice Work** view.

- Between OVs in the practice.

- Back to the **Deliver Partner** (only applies to work that has come from a **Delivery Partner**)
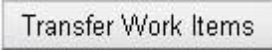
All transfer functions can be carried out by OVs and Administrative staff including retrieving a test from any OV's **My Work** view, and transferring it back into the **Practice Work** view.

Once a test has been assigned to an OV's **My Work** view it disappears from the **Practice Work** view, but may be searched for using the 'Search' functionality. Refer to *Section 19 – Searching for Tests*, for detailed guidance.

If the OV Practice requires work to be transferred back to APHA, AND the work has not come via a Delivery Partner, contact the local APHA Office to discuss the situation. Where approved, APHA will take back the test.

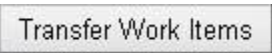## 1. Assigning work to an OV's My Work view from the Practice Work View

  ➢ From the **Practice Work** View select the relevant test(s) by checking ☑ to the left of each work item.

  ➢ Select "Practice Work" from the **Transfer From** drop down list (at the bottom of the screen).

  ➢ Select the relevant OV from the **Transfer to** drop down list.

  ➢ Click Transfer Work Items .

The work will now be transferred to the OV's **My Work** view.

2. Transferring from an OV's My Work view

Work can be transferred from an OV's My Work view to another OV's My Work view within the practice, returned to the Practice Work view, or (for work originating from a Delivery Partner), back to the Delivery Partner.

If the OV (to whom the work is allocated) is known;

  ➢ In the Transfer From drop down list, select "OV"

  ➢ Select the relevant OV's name from the list.

  ➢ Click Refresh Worklist . A list of work assigned to the selected OV will be displayed.

  ➢ Select the relevant work by checking ☑ to the left of each item.

  ➢ Select "OV", "Practice Work", or "Originating Delivery Partner "from the **Transfer to** drop down list.

  ➢ If transferring to an OV select the relevant OV's name.

  ➢ Click Transfer Work Items

  ➢ The work will now appear in the selected view.

If the OV (to whom the work is allocated) is not known;

- ➢ Search for the relevant work item following *Section 19* of this guidance.

- ➢ Open the work by clicking anywhere on the test row.

- ➢ In the **Take Action** drop down list select **Transfer Work**.

- ➢ Select "OV", "Practice Work" or "Originating Delivery Partner" from the **Transfer to** drop down list.

- ➢ If transferring to an OV select the relevant OV's name.

- ➢ Click Submit .

The work will now appear in the selected view.

3. Transferring with the Work open

Work can also be transferred from within the Work Details screen:

- ➢ In the Take Action drop down list select Transfer Work.

- ➢ Select "OV", "Practice Work", or "Delivery Partner" from the Transfer to drop down list.

- ➢ If transferring to an OV select the relevant OVs name.

- ➢ Click Submit .

The work will now appear in the selected view.

Section 8 - Arranging a TB Test and Entering Arrangement Details

When a TB test has been arranged with the Customer, Sam should be updated with the arranged date and time and any other known details. The guidance below describes how to view the **Owner Details** in Sam and complete the required information.

1. Selecting the relevant test

- ➢ From any work view, select the relevant test by clicking anywhere on the test row.

Use the filter function to locate a test quickly.

The Test Details screen will be displayed.

If the customer has already been contacted, skip to Step 3.

2. Arranging the Test

If APHA have detailed any **Special Instructions** for the test, these will appear in the **Test Details** tab. Check these before contacting the Owner.

➢ Click [1. Owner Details] to view the contact details.

3. Entering the test arrangement details

➢ Click [2. Test Details] and enter the Test Arranged Date and Time.

Please ensure the correct arranged test date and time is entered, as this will be used by APHA to:

- Monitor overdue testing.

- Send a reminder letter to the customer 30 days before the test due date (if no arranged date has been entered).

- Share information with the National Paying Agencies to aid coordination of Cattle Identification Inspection visits (replacing the requirement for practices to complete the NV01 visit notification form).

➢ Enter the Test Performer (if known). If the test performer is unknown this can be entered at a later date.

➢ The number of animals on the last TB test will be displayed where available. If the number of animals is known to be different from the information displayed, this figure can be overwritten.

➢ Click [Save] before exiting the screen.

➢ Click ✖ to close the test.

If the arranged date/time of the test changes, update this information accordingly.

Section 9 - Populating Data from CTS and Checking Eligibility

The guidance below describes how to populate a TB test with cattle data from CTS. This will bring back all animals, registered with CTS, on the premises and their details.

ⓘ This process should be completed as close to the test date as possible in order to retrieve the most up-to-date data.

Sam performs basic eligibility checks on all animals that are added to the test, based on the age of the animals. The results of the eligibility checks can be updated before the test takes place (see *section 4 below*).

1. Populating data from CTS

From any work view select the test by clicking anywhere on the relevant row.

➢ Click [Populate CTS Data] .

ⓘ A Test Arranged Date and Time *must* be recorded, and the data Saved, prior to clicking the Populate CTS Data button.

➢ Click [Confirm] if CPH is correct, or [Cancel]   .

➢ Click [Confirm] to retrieve the number of animals registered with CTS

Once populated from CTS, animals cannot be deleted from the test. Any animals which are not tested must be given the appropriate Not Tested reason when results are input. *Refer to the guidance in Section 11 – Entering Results on Sam,* for assigning Not Tested reasons.

If dealing with a Part Test refer to the guidance in *Section 18 – Part Tests*, for further information – particularly to avoid duplication of animals populated from CTS.

ⓘ If the test is populated from CTS a second time (i.e. to check if there are any changes to the animal numbers) and fewer animals are returned (e.g. some animals have moved off) the animals originally downloaded will be left on the list and should be given a Not Tested Reason.

ⓘ If a downloaded CTS animal record does not contain all the mandatory information it will automatically be placed on the Add Animals tab for the missing data fields to be completed.

The Assign Animals tab will be populated with all the animals on the holding.

➢ Select [3. Test Results] then [Assign Animals] to view the list of animals.

Error message displayed

If there is a problem with CTS you may receive an error message. Refer to *Section 21 – Troubleshooting,* for an explanation of possible CTS error messages.

🟠 Multiple Herds on the holding

Where there is more than one herd on the holding, you may be unable to populate the animals from CTS and the following error message will appear:

"Multiple CTS holdings exist for this customer - the list cannot be auto-populated"

If this is the case use the following method;

- Export a TB52 Excel from the test on Sam. Refer to *Section 10 – Producing Data Capture Media,* for guidance.

- Use the CTS Online system to produce a list of all animals on the holding.

🟠 CTS Online cannot be accessed independently whilst you are logged into Sam: log out of Sam then retry CTS Online.

- Copy the Animal IDs produced from CTS Online into the TB52 Excel.

🟠 Remove any unwanted animals from the TB52 Excel to avoid having to provide Not Tested reasons for large numbers of animals.

- Import the TB52 Excel details to Sam. Refer to *Section 12 – Offline Working,* for guidance.

Alternatively, if animals are not returned by CTS or if you do not have access to your client's records through CTS and you wish to add them manually, refer to the guidance in *Section 14 – Manually Adding Animals.*

2. Individual animal tests

For some individual animal tests such as tracings and Inconclusive Reactor retests, the `Populate CTS Data` function will be disabled. The specific animals to be tested will have already been added for these tests by APHA and appear on the `Assign Animals` tab.

🟠 Animals cannot be manually added to these tests.

3. Eligibility and Previous Test History Checks

Sam will perform basic eligibility checks on all animals that are added to the test, based on the test arranged date. Refer to *Section 21 – Troubleshooting,* for the business rules for age-based eligibility checks.

Sam will also check the previous test history of animals to ensure that each animal has not been tested within the last 60 days.

Any animal that is too young to be tested will automatically be moved to the
Not Tested tab and 'Ineligible age-please confirm' will be displayed in the Non-Test Reason column on that tab. Refer to the guidance in *Section 11 – Entering Results on Sam*, for assigning Not Tested reasons.

For any animal tested in the last 60 days, the date of the previous test is displayed in the

Previous Test Date column.

> If an animal had a result of IR, IRx2 or Reactor on the last test, Sam will display this information in the **Flag** column.

> 🟡 If a previous result of IRx2 or Reactor is displayed, contact the local APHA office to discuss the situation.

If an animal is currently within a trace test, 'TR' will be displayed in the **Flag** column. There will be a separate test in the Practice Work view for the Tracing Test. The results of these tests should be recorded on the TR test activity only (applying the appropriate **Not Tested** reason (e.g. On a Trace Test) against the animal on the main test).

4. Recalculating Eligibility

It is possible to re-check the animals for testing eligibility before the test using the Recalculate Eligibility function. Sam checks the animal age and previous test history at the time of the CTS download, based on the Test Arranged/TT1 date

> ➢ Click **2. Test Details** and enter the new planned TT1 date or Test Arranged date.

> ➢ Click **Recalculate Eligibility** .

Any animal that is too young to be tested (using the proposed date) will automatically be moved to the Not Tested tab and 'Ineligible age-please confirm' will be displayed in the Non-Test Reason column. Refer to the guidance in *Section 11 – Entering Results on Sam*, for assigning Not Tested reasons.

For any animal tested in the last 60 days (based on the TT1 or Test Arranged date) the date of the previous test is displayed in the Previous Test Date column.

🟡 The Recalculate Eligibility function can be used more than once, for example if the test date unexpectedly changes. Any necessary updates to animal status will be made by Sam.

Section 10 - Producing Data Capture Media

In order to capture the results of a TB test, the animal list and related testing information can be extracted from Sam in three ways:

1. A printed paper copy in a similar format to the TB52, named the "TB52 Working Form". The subsequent test results are then manually entered on Sam.

2. An electronic (Excel) version of the TB52 Working Form hereafter referred to as the "TB52 Excel Form". The test results and related information can be captured in electronic format, and electronically uploaded into Sam at a later date. This function allows data entry to be completed where Sam access is not available, for example when working with no internet access.

3. An Excel XML File for use in 3rd party software (e.g. TB Master). The test information can be downloaded to 3rd party software and subsequently uploaded back to Sam once the test is complete and results have been entered.

This section provides guidance for completion of each operation.

This process should only be followed after the list of eligible animals has been populated from CTS and/or any animals have been manually added as required at this stage.

1. Printing a TB52 Working Form

> ➤ Click 2. Test Details .

> ➤ Click Print Working Form to produce the TB52 Working Form. The option to 'save' or 'open' will be provided. Send the form to the Practice printer.

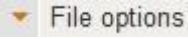The TB52 Working Form can be used to record the results of the TB test. See *Section 11 – Entering Results on Sam*, for guidance on the input of results.
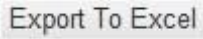
Part Test – Printing a TB52 Working Form

If printing a TB52 Working Form for a subsequent Part Test Sam displays this message: "Previous parts of this test exist

Would you like to include the animals submitted in the previous part tests – Yes/No?" Select No if only the animals remaining should be printed on the TB52 Working Form.
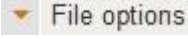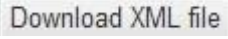
2. Downloading to a TB52 Excel spreadsheet

> ➤ Click 3. Test Results

➢ Expand the ▾ File options section.

➢ Click Export To Excel

➢ Do not open the file yet. Click Save

➢ In the window that appears, select the location you wish to save the file to, for example on your computer desktop.

➢ Click Save .

🛈 Do not change the filename or file type – i.e. xlsx. Any changes will prevent later uploading of the data into Sam. The filename is made up of the WSA Number, CPHH, Date and Time (including seconds).

See *Section 12 – Offline Working*, for guidance on the use of the TB52 Excel Form.

🛈 For Part Tests - in order to avoid animals already tested being duplicated **always** export a fresh TB52 Excel for each part of the test, after the results for the preceding part have been "signed". See *Section 18*, for further guidance on part tests.

3. Downloading the test information for use in 3rd Party Software (e.g. TB Master)

➢ Click   3. Test Results   .

➢ Expand the ▾ File options section.

➢ Select the Download XML file button.

➢ Click Save .

In the window that appears, select the location you wish to save the file to, for example on your computer desktop.

➢ Click Save .

🛈 Do not change the filename. Changing the filename will prevent later uploading of the data into Sam.

Refer to your software providers instructions for the upload and use of the file in 3rd party software.

See *Section 12 – Offline Working,* for guidance on the upload of data produced by 3rd Party software (e.g. TB Master).

Section 11 - Entering TB Test Results on Sam

The guidance below details how to enter test results directly onto Sam.

Each animal must be assigned one of the following statuses before a *complete* test can be "signed" (see below regarding a *part* Test):

➢ Enter Reaction Detail

➢ Not Tested / Not Tested Reason

➢ Confirm Clear

When animals are assigned a status, they are moved to the **Not Tested** or **Tested** tab.

The CTRL+F function can be used for finding OAIs when assigning Enter Reaction Detail or Not Tested status.

All items in the list of animals can be selected by checking the box at the top of the list.

For best practice, it is recommended that categories of animals in the minority are dealt with first to expedite data entry. For example, a test of 100 animals which results in 3 Reactors, 17 animals which read Clear but showing reactions, and with the remainder Clear with no reaction should be dealt with as follows:

- Firstly mark the 20 animals that showed reactions as 'Enter Reaction Details'.

- Enter skin readings for these in the Enter Reaction Details tab, ensuring that the right animals have been accounted for.

- Mark the remaining animals in the Assign Animals tab as 'Confirm Clear' using the checkbox at the top of the column next to the OAIs to select all remaining animals in the list with a single click.

If a test is submitted with animals remaining which have not been assigned a status, this will be treated as a **part test**. The test must be marked as a **part test** (on the **Test Details** tab – see *Section 13 – Completing the Test Details on Sam*) and the remaining animals must be submitted with an assigned status on a subsequent part(s). See *Section 18 – Part Tests*, for further information.

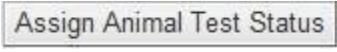If additional animals require adding to the test, refer to the guidance *in Section 14 – Manually Adding Animals.*

If no eligible stock were present and therefore a TB test was not completed, no results should be entered on Sam and this section should not be followed. Refer to *Section 13 – Completing the Test Details on Sam*, for guidance where there is no eligible stock.

1. Viewing the Assign Animals screen

➢ Click **3. Test Results** then **Assign Animals** .

You will be presented with a list of animals which have not been assigned a status.

2. Assigning enter reaction details status

➢ Select all the animals which had a reaction, by checking ☑ to the left of each of those Animal ID's.

➢ From the Assign Animal Test Status drop down list, select "Enter Reaction Details".

➢ Click **Assign Animal Test Status** .

The selected animals will be moved to the Enter Reaction Details tab.

3. Entering Reaction Details

➢ Click **Enter Reaction Details** .

➢ Enter the skin readings and the description of reaction for each animal. The Tab key can be used to move between fields, and the N, S, and C keys to select descriptions.

🔵 To move back a field, either press Shift+Tab to go backwards, or use the mouse.

Pressing the Backspace key whilst in a drop-down field (e.g. Reaction Description) is the same as pressing the browser 'Back' button.

➢ Enter any relevant animal remarks.

🔵 For Reactors found in England and Wales, the DNA Marking Tag reference must be included in the Animal Remarks field.

If a DNA Marking Tag could not be applied (e.g. tag broken);

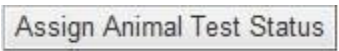➢ Enter "No Tag Applied" in the Animal Remarks field and provide the reason.

🔵 Only enter remarks against an animal when necessary, for example;

➢ DNA Marking Tag references

➢ To alert APHA where signs of other disease were present.

➢ To alert APHA where cross-border Reactors were identified.

4. Assigning a Not Tested status and Not Tested reason

  ➢ From the Assign Animal Test Status drop down list, select "Not Tested".

  ➢ Select one or more animals by checking ☑ to the left of each Animal ID.

  ➢ From the Assign Animal Test Status drop down list, select a Not Tested reason.

Refer to *Section 21 – Troubleshooting,* for a list of Not Tested reasons and their use.

  ➢ Click Assign Animal Test Status .

  ➢ Repeat the process until all the not tested animals have been updated with a Not Tested Reason.

The selected animals will be moved to the Not Tested tab and assigned the selected Non Tested reason

🛈 If this is a *part* test, any animals that are due to be tested on a subsequent part should not be assigned any status at this stage.

  ➢ If a Not Tested reason of "Advised by APHA not to test" has been used, or there is a reason to include any other exceptional comments relating to why the animals were not tested:

  ➢ Include an explanation of why the animal was not tested in the Test Comments on the Test Details tab.

5. Confirming Clear Animals

  ➢ Select all the animals which require a clear status, by checking ☑ to the left of each Animal ID.

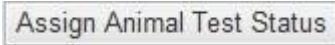 ➢ From the Assign Animal Test Status list, select "Confirm Clear".

🛈 'Confirm Clear' status must only be assigned where there is no change in the skin measurements between TT1 and TT2, e.g. A7 / A7, B6 / B6, and no reaction present at the injection site. It is still a requirement to keep records of flat readings on paper copies for audit purposes.

  ➢ Click Assign Animal Test Status .

The selected animals will be moved to the Tested tab.

6. Resetting Status

ℹ️ If a status has been assigned to any animals in error, you must reset it before assigning the correct option.

- ➢ Locate the animal(s) on the appropriate tab.

- ➢ Select the animals by checking ☑ to the left of each Animal ID.

- ➢ From the Assign Animal Test Status drop down list, select "Reset Status".

- ➢ Click `Assign Animal Test Status`

The animals will be moved back to the Assign Animals tab. Follow the appropriate steps again to assign the correct status to the animals.

7. Confirming all animals are assigned a status

- ➢ Check that all animals for the test or part test appear on the Tested or Not Tested tab.

- ➢ Ensure that no animals remain on the Add Animals tab.

- ➢ Unless this is a part test, check that no animals remain on the Assign Animals tab.

8. Add or Update Groups

On all the Test Results tabs it is possible to add animals to a group (e.g. those found at different locations), or update which group animals belong to.

To add or update an animal's group;

- ➢ Locate the animals on the appropriate tab.

- ➢ Select the animals by checking ☑ to the left of each Animal ID.

- ➢ Enter the name of the group in the text box.

- ➢ Click `Update Group`

Section 12 - Offline Working

Where an electronic (Excel) version of the TB52 has been downloaded, the testing information and results can be entered on the file and uploaded to Sam.

Where 3rd party software (e.g. TB Master) has been used to record the testing information and results, this data can also be uploaded to Sam.

🔵 The CTRL+F function can be used for finding OAIs on the TB52 Excel. This section provides guidance on the following procedures:

Entering test information and results into the electronic version of the TB52 Excel, and uploading the data into Sam.

Uploading test information and results from 3rd party software into Sam (refer to Step 7).

1. Entering test details on the TB52 Excel ➢

> ➢ Open the TB52 Excel file.

> ➢ Open the **Test Details** sheet.

> ➢ Enter the details for the test in the appropriate fields. For a more detailed explanation of individual test details, see *Section 13 – Completing the Test Details on Sam.*

> ➢ If any alternative cattle locations were identified, ensure they are entered.

🔵 Only enter test comments when necessary, for example to alert APHA to:

> ➢ Significant changes to Customer details.

> ➢ Disease and welfare concerns.

> ➢ An explanation of "added animals" i.e. recently purchased

> ➢ Identification issues (e.g. significant numbers of animals with only one tag) ▪

> ➢ Explanation of why animal has been given a non-standard identifier.

> ➢ Explanation of why animals were not tested (e.g. Lost eartag/Cannot be located)

> ➢ Any other identification issues.

Where applicable, ensure the eartags of the affected animal(s) are noted.

2. Entering test results

> ➢ Open the Test Results sheet.

> ➢ Select an Overall Result for each animal.

> ➢ Enter the Reaction Details for relevant animals.

> ➢ Select a Not Tested Reason for relevant animals

> ➢ Enter any relevant Animal Remarks.

For Reactors found in England and Wales, the DNA Marking Tag reference **must** be included in the Animal Remarks field.

If a DNA Marking Tag could not be applied (e.g. tag broken);

➢ Enter "No Tag Applied" in the Animal Remarks field and provide the reason. Only enter remarks against an animal when necessary, for example; ▪

  o DNA Marking Tag references.

  o To alert an APHA where signs of other disease were present.

  o To alert an APHA where cross-border Reactors were identified.

For animals not tested, the appropriate Not Tested reason should be used. Refer to *Section 21 – Troubleshooting*, for a list of Not Tested reasons and their use.

3. Adding animals

For any animal that was tested but is not included on the electronic TB52 Excel, either:

➢ Add only the OAI for the animal and test results in the next available row. Or

➢ Add the full information for the animal and test results in the next available row.

If only the OAI has been added, when the TB52 Excel is uploaded to Sam the system will complete the remaining information for the animal where available on CTS.

OAIs must be entered in the correct BCMS format to ensure the Animal Testing History on Sam is accurately maintained (e.g. For UK eartags enter "UK100234567893" with no spaces).

If the OAI of any animal is not known:

➢ Enter a unique identifier for the animal. This should be pre-fixed with the WSA number, e.g. where the unique marking applied to the animal was "XI", and the WSA was "4354"; enter "WSA4354 XI".

Include an explanation of why the animal has been given a unique identifier in the Comments/Additional Information field on the Test Details view.
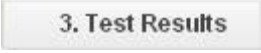
4. Entering expense claims

➢ Open the **Expense Claims** sheet.

➢ Complete the expense claim information.

5. Uploading the test information and results into Sam

Once the TB52 Excel is complete, the details should be uploaded to Sam as soon as possible;

To avoid the duplication of animals on the test, before uploading the test data into Sam, delete any rows on the Excel doc that carry animals already submitted on any previous parts of the test.

- ➢ Select the relevant test from the Practice Work or My Work view.

- ➢ Click `3. Test Results`

- ➢ Expand the ▼ `File options` section.

- ➢ Click `Import From Excel` .

- ➢ Browse for the file on your computer and select it.

- ➢ Confirm the file you have selected is the one you wish to upload into Sam.

- ➢ Click `Import` .

The Test Results tabs will be automatically populated with the details on the TB52 Excel. Any additional animals will also now appear on the test.

6. Data Discrepancies

If there is a discrepancy with the test results entered on the TB52 Excel, following the upload to Sam, this will be highlighted against the animal in red text on the Enter Reaction Details tab, under the Discrepancies column.

To enable the "signing" of the test, any discrepancies must be resolved.

For example, if an animal has been given reaction details which are interpreted by Sam as IR or Reactor, but the result manually selected in the TB52 Excel is "Clear", a discrepancy will be displayed. Sam will automatically change the result based on the interpretation for the test.

If you wish to accept the system calculated result, as displayed in the Result column:

- ➢ Select the relevant animal(s) by checking ☑ to the left of each Animal ID.

- ➢ From the Assign Animal Test Status drop down list, select "Confirm Data Correct".

If you wish to apply an alternative Animal Test Status:

➢ Select the relevant animal(s) by checking ☑ to the left of each Animal ID.

➢ From the **Assign Animal Test Status** drop down list, select the relevant option.

➢ Click Assign Animal Test Status

The "**Reset Status**" option to return animals back to the **Assign Animals** tab is also available.
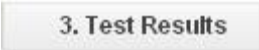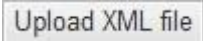
🛈 If a status has been assigned to an animal in error, <u>you must</u> reset it before assigning the correct option.

🛈 Always refer back to your original testing notes prior to confirming such changes.

Where necessary, refer to the guidance in *Section 11 – Entering Results on Sam*, to complete the results for the animals.

7. Uploading the testing information and results into Sam from 3rd Party Software

Once the 3rd party sourced data file is available, the details should be uploaded to Sam as soon as possible. Refer to your software provider's instructions for guidance on producing a XML file suitable for the upload into Sam.

➢ Select the relevant test from the Practice Work or My Work view.

➢ Click 3. Test Results

➢ Expand the ▼ File options section.

➢ Click Upload XML file .

➢ Browse for the file on your computer and select it.

➢ Confirm the file you have selected is the one you wish to upload into Sam.

➢ Click Import .

The Test Results tabs will be automatically populated with the details input via the 3rd party software. Any additional animals will also now appear on the test.

Section 13 – Completing the Test Details on Sam

This section provides guidance for the completion of the **Test Details** screen.

If using Offline Working functionality, the test details may be completed on the TB52 Excel or 3rd Party software and electronically uploaded to Sam.

If the test details and results cannot be completed and "signed for" immediately after the test has been completed, at least the TT1 date should be entered. This will inform APHA that the test has been started and prevent any further actions by APHA.

1. Click 2. Test Details .

2. TT1 Date

> ➢ Enter the date of the first visit, where initial skin measurements were captured and Tuberculin was injected.

> ➢ When submitting a part test with details of not tested animals only e.g. Dangerous/Unmanageable animals that have been slaughtered/killed after other animals in the herd were tested, use the date you became aware of the animal no longer present in the herd as TT2 date and work back to find the TT1 date to avoid KPI failures.

3. TT2 Date

> ➢ Enter the date of the second visit, where subsequent skin measurements and reaction details were captured.

> ➢ When submitting a part test with details of not tested animals only e.g. Dangerous/Unmanageable animals that have been slaughtered/killed after other animals in the herd were tested, use the date you became aware of the animal no longer present in the herd as TT2 date to avoid KPI failures.

4. Part or Complete Test?

> ➢ Select the appropriate radio button to confirm if the test is;

> ▪ A Complete Test (all animals have been assigned a status)

> ▪ A Part Test (some animals have not been assigned a status and will be tested in a subsequent part)

> ▪ The Final Part Test (part tests have been submitted previously and all remaining animals are now assigned a status)

5. No Eligible Stock

If no eligible stock were present and therefore a TB test was not completed;

➢ Select ⦿ No Eligible Stock

➢ Click Yes to accept the warning message and proceed.

Refer to *Section 17 – Reviewing and Signing for Tests.*

6. Test Interpretation

APHA may inform the OV practice, via the Special Instructions field on the **Test Details** view, that the test should be read at standard and revert to severe interpretation if IRs or Reactors are identified.

For all other circumstances the radio buttons on the Test Details tab will indicate the interpretation to be used

➢ Ensure the correct Test Interpretation is selected, and not altered unless directed to do so by APHA.

7. No. of Animals

The number of animals tested on the previous TB test is provided by default. This should be updated (manually overwritten) if known to be inaccurate.

8. Special Instructions

Special instructions regarding the test will be provided by APHA where appropriate.

9. Test Performer

If the test performer has changed, or was not selected when arranging the test:

➢ Select the correct OV.

10. Test Performer

If the test performer has changed, or was not selected when arranging the test;

➢ Select the correct OV.

11. Tuberculin Details

➢ Select the relevant option in relation to the advice given.

12. Tuberculin Batch Numbers

➢ Enter the batch numbers for both Avian and Bovine Tuberculin used.

13. Comments/Additional Information

Enter any specific information regarding the test.

 Only enter test comments when necessary, for example to alert APHA to:

- Significant changes to Customer details.

- Disease and welfare concerns.

- An explanation of "added animals" i.e. recently purchased

- Identification issues (e.g. significant numbers of animals with only one tag) ▪

- Explanation of why animal has been given a non-standard identifier.

- Explanation of why animals were not tested (e.g. Lost eartag/Cannot be located)

- Any other identification issues.

Where applicable, ensure the eartags of the affected animal(s) are noted.

14. Expense Claims

➢ Complete the expense claim information for the test or part

 Does not apply to tests allocated to an OV Practice by a Delivery Partner, or paid privately by the Customer.

15. Alternative Cattle Locations

 Use of this is not mandatory but is of particular relevance if Reactors or IR's are found.

If any alternative cattle locations were identified during the test:

➢ Select the Alternative Cattle Locations check box .

➢ Complete the free text box for the property/location name and an OS map reference.

➢ Several herd locations can be added, if necessary select to add a new row.

➢ Locations can also be deleted by clicking

16. Saving the Test Details

If any information has been updated on the Test Details tab:

➤ Click [Save] before exiting the tab to ensure no data is lost.

Section 14 - Manually Adding Animals

Where there is a requirement to add one or more animals to a test the guidance below should be followed. Animals can be added at any stage, however this will most commonly be after the test has taken place, for example when additional animals were identified and tested during the visit.

If an animal is already listed in the test but has not been assigned a status, the addition will not be permitted.

1. Navigating to the add animal tab

➤ Click [3. Test Results] then [Add Animal] .

2. Enter Animal ID(s) Either

➤ Click to add a single row.

Or if there are multiple animals follow Step 6

➤ Enter the Official Animal ID of the first animal you wish to add.

OAIs <u>must</u> be entered in the correct BCMS format to ensure the Animal Testing History on Sam is accurately maintained (e.g. For UK eartags enter "UK100234567893" with no spaces).

3. Populate Animal Details from CTS

➤ Press TAB or click to navigate away from the Animal ID. This instigates the call to CTS for the individual animal data.

Where the information is available on CTS, the system will populate the following fields:

▪ Breed

▪ Date of Birth

▪ Sex

4. Manually Entering Details

If animal details are not downloaded from CTS (indicated by an X in the Animal ID field) the following animal details should be entered manually;
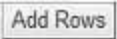
- Breed Code

- Age

- Unit of Age

- Sex

🛈 Date of Birth cannot be manually entered.

5. Animals with no OAI

If during the testing an animal was identified with no eartag and therefore no animal ID (OAI);

➢ Enter a unique identifier for the animal. This should be pre-fixed with the WSA number, e.g. where the unique marking applied to the animal was "XI", and the WSA was "4354"; enter "WSA4354 XI".

➢ Include an explanation of why the animal has been given a unique identifier in the Comments / Additional Information field found on the Test Details tab.

➢ Follow Step 4 to enter the remainder of the information for the animal.
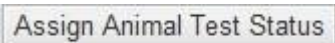
6. Add Multiple Animals

➢ Enter the number of rows (animals) to be added in the Add Rows field and click
Add Rows

➢ Enter the Official Animal ID of the first animal you wish to add and follow Steps 3-5.

🛈 If adding several animals to the test with the same Test Status, add all these animals first before proceeding to Step 7.

7. Assigning a Test Status

Each animal must be Assigned a Test Status;

➢ Select the relevant animals by checking ☑ to the left of each Animal ID.

➢ From the Assign Animal Test Status drop down list, select the appropriate status.

➢ Click Assign Animal Test Status

If no status is assigned, the animals will remain on the Add Animals tab. A status must be assigned before the test or part test can be "signed".

If a status has been assigned to an animal in error, <u>you must</u> reset the status before assigning the correct option.

For detailed information on assigning/re-assigning a status, refer to *Section 11 – Entering Results on Sam.*

8. Deleting animals manually added in error

If an animal has been manually added in error to the Add Animal tab:

➢ Click 🗑 next to the animal to be deleted. The animal will be deleted from the list.

Animals can only be deleted prior to assigning a Status.

Section 15 - Tests Requested by the Customer

The guidance below should be followed when an OV Practice is requested by the customer to arrange and undertake a test which has **not** been planned, instigated or scheduled by APHA.

Tests may be created on Sam by a Delivery Partner but must be transferred to an OV Practice to sign and submit the results.

The types of TB test which can be created on Sam are:

- "AI Centre only"

- "Private: Not for Post Movement"

- "Pre-movement Test England and Wales only"

- "Export only"

Please note: it is a statuary requirement that an OV seeks approval from APHA before undertaking any of the above TB tests *except*

- In Scotland there is a 'blanket' authorisation for pre- and post-movement testing.

- While in England and Wales the authorisation relates to pre-move movement testing only.

An OV must therefore contact their local APHA office before undertaking any of the other TB tests above.

1. Creating the test

➢ From the Create Test drop-down, select the correct test type.

Select Test Type...
Select Test Type...
AI Centre only
Private: Not for Post Movement
Pre-Movement: Eng & Wales only
Export only

➢ Click **Create Test**
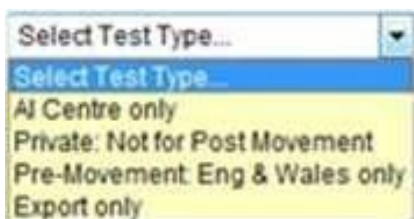
Sam will display the Search screen.

2. Searching for a Customer

➢ Enter the CPH of the customer and click **Submit**

If the correct customer is found, proceed to Step 3 to select the customer, location and livestock unit.

If the CPH is not known;

➢ Select the **Advanced Search** check box   .

The system will display additional search fields;

➢ Enter one or more known values to perform the advanced search.

A wildcard can be used on the advanced search fields;

▪ "%" – Searches for an unspecified number of characters.

▪ "?" or "_" Searches for a single character.

For example:

▪ Enter "Jon%" in the Name filter.

▪ Click **Submit** .

All records with a customer name beginning "Jon" are displayed (e.g. "Jones", "Joneson", "Jonston")

🛈 The system will only display results with a valid CPH. If the number of records returned by the search exceeds 50, only the first 50 records will be displayed. Return to the **Search** screen and use other search criteria.

At any point, to return to the initial search screen click **Search Again**.

3. Selecting the customer and location/unit

- ➢ Select the customer with the correct CPH and click Submit

- ➢ Select the relevant location and herd (Animal Production Usage) and click Submit

If the required customer is not found, begin a new search, or cancel.

If creation of the test is cancelled, the system will return to the original view.

4. Confirming the test associations

- ➢ Click Create Test to confirm the customer, location, livestock unit and test type.

Sam will now automatically:

- ▪ Set the Earliest Start of the test to today's date.

- ▪ Add the test to the Practice Work view.

- ▪ Open the test at the Test Details tab.

5. Completing a Privately Arranged Test

For continuation of the process, follow the procedure described in *Section 8 – Arranging a Test and Entering Arrangement Details,* beginning at Step 3.
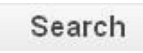
Section 16 - Unallocated Tests

The guidance below should be followed when a customer contacts the OV practice to carry out an:

- ▪ Unallocated Test

- ▪ The types of test which are unallocated are as follows;

- ▪ POSTMT (Post-movement test – England and Wales)

- ▪ POSTMTS (Post-movement test – Scotland)

- ▪ PRMTS (Pre-movement test – Scotland)

An unallocated test is a TB test required by APHA but not allocated to a specific OV practice or commissioned with a Delivery Partner. The customer will contact an OV practice and advise the WSA number of the test. The WSA number is provided to the customer by APHA (in the letter notifying the customer that a test is required) - this number can then be used to search for the test on Sam.

A Delivery Partner may retrieve an unallocated test but must transfer the test to an OV Practice to sign and submit the results.

1. Searching for unallocated work

- ➢ Click [Search] to go to the Search screen

- ➢ From the 'I wish to search for...' list, select "Other Work"

- ➢ Enter the WSA number provided by the customer (if the WSAnumber is not known the Practice or Delivery Partner should contact their local APHA office).

- ➢ Click [Search].

2. Confirming details

Sam will display the customer name, location and CPH.

- ➢ Click [GetWork] to confirm these details are correct and to add the test to the **Practice Work** view and open the test at the **Test Details** tab.

The test has now been allocated to the OV practice or Delivery Partner, and can be arranged and completed as required following the appropriate sections of this guidance.

🛈 Once an unallocated test has been assigned to the OV Practice it is not possible to return it to APHA. If a situation occurs where an unallocated test assigned to the OV practice is not desired, contact the local APHA office.

Section 17 - Reviewing and Signing for Tests

When a test or part test is complete it must be reviewed and "signed". "Signing" for a test on Sam involves the electronic submission of testing information and results to APHA.

"Signing" for a test can only be completed by an Official Veterinarian, with the exception of tests where no eligible stock was present. If the no eligible stock option has been chosen on the **Test Details** tab, the test can be "signed" by administrative staff, including those working for a Delivery Partner.

🛈 In exceptional circumstances, the OV "signing" the test may be a different OV to the test performer. If this situation occurs contact the local APHA office for approval before "signing" for the test.

Official Veterinarians are able to identify which tests are complete and ready for "signing" from the **Practice Work** or **My Work** views. A green indicator will appear to the right of any test where the data entry is complete and the test is ready for review and signing.

Before a test or part can be "signed", the following conditions must be met:

- All relevant animals are assigned a status.

- The **Test Details** tab has been completed.

- An OV has reviewed the test and confirmed all information is present and correct.

The **Summary and Sign Off** information has been completed. If this is a part test, see *Section 18 – Part tests*, before proceeding.
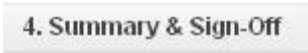
1. Review Test

➢ Review the test to ensure all information is present and correct.

This should include ensuring:

- All animals relevant to this test or part are assigned a status, and where applicable reaction details are entered and confirmed.

- The Test Details screen is complete.

 If a part test, not all animals will have a status assigned. See *Section 18 – Part Tests*, for further information.

2. Review the Test Results Summary

➢ Click

➢ Review the Test Results Summary.

If any information is incorrect:

➢ Make amendments as necessary, following the appropriate section of this guide.

3. Completing Isolation Details

Using the radio buttons confirm whether or not:

➢ The Customer has been instructed to isolate the animals.

➢ The Customer has been provided with a restriction information document (TB181).

If the answer to the restriction information document question is 'Yes', then confirm whether or not:

- ➢ The Customer has been informed of the test results.

- ➢ Enter the date the Customer was informed of the test results.

Step 4.
- ➢ If an OV has completed the review process, skip to Step 7.

- ➢ If administrative staff have completed the review process, follow Step 5.

Step 5.

- ➢ Click Check Data .

Sam will perform validation checks on the test data.

If any data is incorrect, Sam will highlight the field with a red cross or display an error message at the top of the screen. Hover over a red cross to see a description of the issue. Follow the appropriate section of this guide to correct the information.

If no eligible stock was present, skip to Step 6.

If a TB test was completed:

Once all information has been confirmed as correct:

- ➢ In the **Test Ready to Sign** field, select the ⦿Y radio button

- ➢ Scroll to the top of the screen and Click Save

Sam will now display a green indicator against the test in the **Practice Work** or **My Work** view. This informs the OV that the test is complete and ready for signing.

Admin staff may **Transfer** the test to the **My Work** view of the OV test performer.

- ➢ From the **Take Action** drop down select **Transfer Work**

- ➢ Select **Transfer to: OV**

- ➢ Select the **Vet Name**

- ➢ Click **Submit.**

6. "Signing" for no eligible stock

- ➢ Confirm the declaration

- ➢ Click Submit

🛈 For guidance on marking the test as No Eligible Stock, refer to *Section 13 - Completing the Test Details on Sam.*

7. "Signing" Test Results

Once the test is complete, it should be submitted to APHA. This process can only be completed by an OV with the exception of no eligible stock.

If administrative staff have reviewed the test and confirmed the test as ready for signing, a green indicator will appear against the test in the Practice Work or My Work view.

➢ If not completed already, review the test to ensure all information is present and correct.

The OV must review the test data entered against the original testing notes/working form and which they are 'signing'.

If any data is incorrect, follow the appropriate section of this guide to correct the information, or refer back to administrative staff.

➢ Confirm the declaration by checking the ☑ box.

➢ Click Sign Test Results .

➢ Click Submit .

🛈 By completing this process the OV is confirming that all details provided within this test are complete and accurate.

🛈 The data entered <u>cannot</u> be changed once a test has been "signed" & submitted.

Section 18 - Part Tests

If it is not possible to test all of the eligible animals during a single visit, a part test should be used to ensure that APHA is updated with results as soon as possible. A part test allows animals with results input on Sam to be submitted, leaving the remaining animals to be tested separately.

For cases where it has been agreed that a certain low risk group of cattle moved away with no facilities available can have the Short Interval testing delayed, part tests should not be used when each group is tested completely on the same day.

The process below should be followed only when all animals for the part to be submitted have been assigned a status of Confirmed Clear or Not Tested, or reaction details have been entered.

Any animals which have not been assigned a Status will remain active on the test to be completed on a subsequent part. **Animals still to be tested must <u>not</u> be assigned a 'Not Tested reason'.**

If using offline working functionality for Part Tests - in order to avoid animals already tested being duplicated **always** export a fresh TB52 Excel form for each part of the test, after the results for the previous part have been "signed". See *Section 10 – Producing Data Capture Media*, for guidance on downloading a TB52 Excel form.

Part Test – Printing a TB52 Working Form

If printing a TB52 Working Form for a subsequent Part Test Sam displays this message: "**Previous parts of this test exist would you like to include the animals submitted in the previous part tests – Yes/No?"**

Select No if only the animals remaining should be printed on the TB52 Working Form.

1. Selecting a Part Test

> Click **2. Test Details**

> Select **Part Test**

The option for a part test can be selected at any stage, for example, if it is known in advance that this will be a part test.

2. Final Part

If this is the final part of a test;

> Click **2. Test Details**

> Select **Final Part Test.**

It will only be possible to submit the final part of a test once all animals have been assigned a status and reaction details have been completed where necessary.

3. Completing Test Details

> Ensure the Test Details tab is completed with the relevant information for this part. See *Section 13 – Completing the Test Details on Sam*, for guidance.

Ensure the test arranged date and time is updated for each part test as soon as possible. Once the test arranged date is entered, the 'Recalculate Eligibility' function

must be used to refresh the list of eligible animals prior to each part test being carried out - to ensure the correct animals are tested. Failure to do this may require a re-visit.

4. Signing for the Part Test

➢ Follow the guidance in *Section 17 – Reviewing and Signing for Tests.*

Once a part test has been "Signed", the user will be returned to the Test Details tab. This will be cleared of any information previously input, and a red cross will appear against the test arranged date to indicate that the user should enter the arranged date for the next part of the test (if known).

🛈 Multiple part tests cannot be submitted simultaneously. Therefore the test details and test results for a given part cannot be input directly onto Sam until the previous part has been "Signed".

Section 19 - Searching for Work

The guidance below details how to search for work previously submitted to APHA on Sam by the OV practice, and also current work that is in an individual's **My Work** or the **Practice Work** view.

🛈 Administrative staff may use this facility to search for work that has been assigned to an OV within the practice and found in the OV's **My Work** view.

🛈 **Test Details** and **Results** can be completed – follow the relevant sections in this Guide.

1. Search for Work

➢ From the Practice Work or My Work view click Search

➢ From the "I wish to search for" list select to search for 'Current Work' or 'Submitted Work'.

For 'Other Work' refer to the guidance in *Section 16 – Unallocated Tests.*

➢ Enter one or more search parameters.

➢ Click Search

A list of work items relevant to the search will be displayed. The list can be sorted by any of the columns.

2. Select Work

> ➢ Select the required work item.

For Current work, a test will open at the Test Details tab, other work will open at the data entry screen

🔴 Test Details and Results can be completed – follow the relevant sections in this Guide.

For Submitted work, only a TB test can be selected. The full details of the test will appear in a read only format.
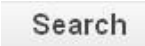
Section 20 - Produce Test Certificate

The guidance below details the process that should be followed to print a test certificate for a customer. The test certificate lists all animals that have been tested on a test or part test. A test certificate is a certified copy of the test results for the customer and should only be printed when requested.

If the test has been completed in parts a test certificate will be produced for each part.

🔴 OV practices and Delivery Partners can only produce Test Certificates for clear tests. If a test is re-interpreted by APHA and becomes non-clear, the test certificate for the original test submitted will not be available for production.

1. Search for Test

> ➢ From the Practice Work or My Work view click Search

> ➢ From the "I wish to search for" list select 'Submitted Work'

> ➢ Enter one or more search parameters. The Activity Type must be TB Test

> ➢ Click Search

A list of tests relevant to the search will be displayed, sorted by TT1 date. The list can be sorted by any of the columns.

2. Select Test

> ➢ Select the required test using the WSA-ID Hyperlink.

The full details of the test will appear in a read only format.

3. Print Test Certificate

> ➢ Click 🖨 to view the Test Certificate.

> Print the Test Certificate and send out to the customer. The Test Certificate can be saved if required.

🛈 The Test Certificate can also be printed from the 'Owner Details' screen if the test is viewed.

🛈 There is no requirement to sign the Test Certificate.

Section 21 - Completing non TB work, and TB in non-bovines

This section describes how to complete a non TB work activity and applies only where this work has been commissioned via a Delivery Partner.

🛈 TB testing of non-bovine species is included in this section

This screen is for reporting the completion of the work only and does not replace any current instructions for submitting results or reports to APHA.

🛈 The information captured on screen must reflect the whole task to include <u>all parts</u> where work is delivered over several days (for example a TB test of non-bovines carried out on several visits). The non TB work activity does not behave in the same way as a TB Skin Test activity and once submit has been hit it will no-longer be available to you.

Completion Date	Work Item **2**	Quantity
📅	Please Select... ▾	
1		

Time Spent: Hours   Minutes
3   [ ]   Select... ▾

Role   **4**   Vet/Tech Number   Name
⦿ Veterinary ○ Technical   [ ]

Comments*   **5**   [   ]

* This field is provided for your internal use only, it should not be used for information requiring review following submission.

All appropriate paperwork has been dispatched ☐
6

Submit

40

1. Entering the Completion Date

Enter the date the work (both field and office elements) was completed.

Where a work was delivered in several parts this is date the final part was delivered.

2. Selecting the Work Item and Quantity

The available Work Items will depend on the Work Area. Select a value from the drop down list and enter the quantity e.g. Blood Sample and 12.

3. Entering the Time Spent

Enter the total Time Spent completing the work in Hours and Minutes (this should be the cumulative total where work has been delivered over several parts / days). Minutes can only be entered in multiples of 15 minutes. For guidance on completing this field refer to the Delivery Partner which allocated it.

4. Populate the performer of the work

Select the role of the performer using the radio buttons. The default is Veterinary. Enter the OV's unique number in the Vet/Tech Number field and the OV's name will be populated automatically to confirm the number is correct.

For Technical (e.g. Lay Blood Samplers) roles, the process is the same after selecting the "Technical" radio button.

5. Enter comments

Free text comments may be added to assist communication between the Delivery Partner and the OV Practice.

This field is not visible once the work has been submitted. It will not be reviewed by APHA.

6. Confirm paperwork

Check the box to confirm the paperwork has been dispatched. The work cannot be submitted until this box is checked.

The data may be saved at any point by pressing the Save button. It may be submitted by pressing the Submit button.

Where work was delivered in several parts, only submit once the final part has been delivered and the data for all parts has been captured.

Once the work has been submitted it cannot be changed. Only Submit the work if this is the process agreed between the OV Practice and the Delivery Partner responsible for managing the work.

The work may be transferred back to the Delivery Partner to submit. Refer to Section 7 for instructions on how to transfer work.

Section 22 – Troubleshooting

If you need further assistance, or have a query relating to the performance or use of Sam, contact the Sam Support Desk on **0870 242 4996.**

Calls will be answered during the following times:

Monday to Friday 7am - 7pm.

Out of hours – An operator will take your details and arrange a call back during supported times.

Alternatively, you can email the Support Desk at **APHAServiceDesk@apha.gsi.gov.uk.**

If you have a Veterinary query relating specifically to a TB test, contact your local APHA office.

Please refer to the following 3 pages for information on:

- ➢ CTS error messages

- ➢ Business Rules for Age-Based Eligibility Checks

- ➢ Not Tested Reasons

CTS Error Messages

Error Message	Detailed explanation
The Link to CTS is not currently available	The link to CTS On-Line is not available; continue without the required animal data or try again later.
The holding does not exist on CTS - the list cannot be auto-populated	The holding was not found on CTS; continue without the required animal data or abandon the form (e.g. to go back and check if the CPH Number is correct).
Multiple CTS holdings exist for this customer - the list cannot be auto-populated	Multiple holdings were found on CTS; continue without the required animal data or abandon the form (e.g. to go back and check if the CPH Number is correct).
No animals are registered for this customer - the list cannot be auto-populated	No animal details were found for the holding on CTS; continue without the required animal data or abandon the form (e.g. to go back and check if the CPH Number is correct).

The customer has animals registered at separate locations - the list cannot be auto-populated	Animal details for the holding are recorded at sub-location level (rather than location level for the specified CPH number) on CTS; continue without the required animal data or abandon the form (e.g. to go back and check manually if the CPH Number is correct).
No valid animal details exist on CTS - the list cannot be auto-populated	No valid animal details were returned by CTS for the holding i.e. and held in suspense awaiting correction; continue without the required animal data or only animal details invalid abandon the form (e.g. to go back and check if the CPH Number is correct)

Business Rules for Age-Based Eligibility Checks

The table below displays which animals are eligible for TB testing based on age, location and test type.

Test Type	England	Wales	Scotland
12m	Only those 42 days and over	Only those 42 days and over	Only those 42 days and over
6m	Only those 42 days and over	Only those 42 days and over	N/A
CON	Only those 42 days and over	All	Only those 42 days and over
CON12	Only those 42 days and over	Only those 42 days and over	N/A
CON6	N/A	Only those 42 days and over	N/A
CT(I-I)	Only those 42 days and over	All	Only those 42 days and over
CT(EM)	Only those 42 days and over	All	Only those 42 days and over
CT-HS1	Only those 42 days and over	Only those 42 days and over	Only those 42 days and over
CT-HS2	Only those 42 days and over	Only those 42 days and over	Only those 42 days and over
CT-NH1	Only those 42 days and over	Only those 42 days and over	Only those 42 days and over
CT-NH2	Only those 42 days and over	Only those 42 days and over	N/A
CTW1	N/A	Only those 42 days and over	N/A
CTW2	N/A	Only those 42 days and over	N/A
IA12	N/A	Only those 42 days and over	N/A
IA6	N/A	Only those 42 days and over	N/A
IASI	N/A	All	N/A
POSTMT	All	All	N/A
POSTMTS	N/A	N/A	All
PRMT	All	All	N/A
PRMTS	N/A	N/A	All
RHT24/36	Only those 42 days and over	N/A	Only those 42 days and over
RHT48	Only those 42 days and over	N/A	Only those 42 days and over
SI	Only those 42 days and over	All	All
PSI	Only those 42 days and over	N/A	N/A
DTG	Only those 42 days and over	N/A	N/A
TBU	ALL	All	N/A
WHT	Only those 42 days and over	Only those 42 days and over	Only those 42 days and over
WHT2	Only those 42 days and over	Only those 42 days and over	Only those 42 days and over
Default	All	All	All

Not Tested Reasons

Not Tested Reason	Code	When to use
Dead	D	The animal has died
Advised by APHA not to test	AH	APHA has specifically advised you not to test this animal
Tested recently	60D	The animal has been tested in the last 60 days
Under a different testing regime	DR	The animal is tested under a different regime (e.g. on a different CPHH
Confirm not eligible	NT-NE-SC	To confirm a system advised 'not eligible' animal.
Animal not at location	NAL	The animal was not on this CPH
On a trace test	TR	The results of this animal are recorded on a tracing test, to be submitted separately
Not eligible – for this test type	NE	The animal was not eligible for this test type (e.g. females yet to calve where the test type is RHT)
Not Tested – Reactor	NT-R	Sam has indicated the animal was a reactor on the last test and automatically assigned this Not Tested reason to the animal. No user input is required.

The codes below have been removed, if these circumstances arise please refer to the "Reporting Test Observations" section in the OV and ATT instructions in the APHA OV Gateway:

- Dangerous/Unmanageable

- Escaped at TT2

- Not presented at TT2.