

Donation of bone marrow and peripheral blood stem cells (PBSC) for transplantation

Guidance for submitting an Accredited Assessor report online

You should read these notes in conjunction with the Guidance for Transplant Teams and Accredited Assessors.

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1. Introduction

The Human Tissue Authority (HTA) has created an online system for the submission of Accredited Assessor (AA) reports.

The system allows you to write your report electronically and save it as many times as you wish before finally submitting it to the HTA.

The operating instructions below outline the process for accessing the online submission system and completing your report. Please note that this is a secure system (you should see a padlock in the bottom right hand corner of the screen while the system is open) and given the highly confidential nature of these reports you should not disclose your password to anyone.

Please note that the Scottish legislation is slightly different to that of the Human Tissue Act 2004 which covers England, Ireland and Wales. The detail about living donation in Scotland is set out in the Human Organ and Tissue Live Transplants (Scotland) Regulations 2006 and the Adults with Incapacity (Removal of Regenerative Tissue for Transplantation) (Form of Certificate) (Scotland) (No. 2) Regulations 2006. See Scottish Annex on the HTA website¹ for further detail.

2. Assessment and Approval Process

Decisions will be made on bone marrow and PBSC transplant cases where the donor is a child under 18 years or adult lacking capacity will be made by the HTA Transplant Approvals Team on the basis of reports and supporting information provided by AAs in individual Trusts (Operating Divisions in Scotland) and transplant units.

3. Decision process

Once you have submitted your report, the HTA will make a decision on the case based on your assessment. You will be notified of this decision by an automatically generated email alert.

The HTA Transplant Approvals Team will provide a decision within 10 working days of a case being referred by an AA.

The HTA will also notify the stem cell transplant coordinator and the donor's clinician of all decisions at the email addresses you include in the report.

Decisions are valid for **6 months** from the date of the notification email. If the donation does not take place within 6 months then the assessment process will have to be repeated and a new report submitted to the HTA.

¹ http://www.hta.gov.uk/db/documents/2006-07-13_Scottish_Annex_to_the_Codes_200607134442.pdf

4. Support for the online submission system

If you experience any problems using the online system please contact the HTA transplant approvals team:

Tel: 020 7211 3400

Email: transplants@hta.gov.uk

5. Contingency system

Should the online system be unavailable for any reason the process for submitting reports will be as follows (the steps should be followed in sequence):

1. If the system cannot be accessed online, assessors should retry after a few hours and if still unavailable, again on the following day.
2. If the system still cannot be accessed, complete a contingency report form which can be downloaded from the HTA website. You can submit this report by email, post or fax.

Email your reports to transplants@hta.gov.uk with **AA Report** in the subject line

Or send a hard copy to:

Transplants

Human Tissue Authority
15-17 Furnival Street
London EC4A 1AB

Or send a copy by fax:

Attention: **Transplants**
Fax number: 020 7211 3430
Subject: Bone Marrow / PBSC Transplant

If submitting a contingency report form by post or fax, you should notify the transplant approvals team by phone to ensure they receive it.

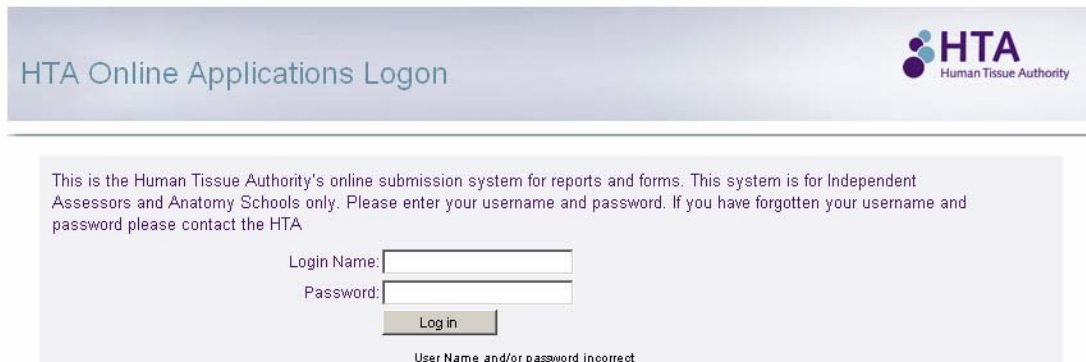
6. Operational instructions

Please note that the online system was developed to be compatible with Internet Explorer. However, it is possible to use the system if you have the most recent version (8.1) of Netscape, although the formatting and functionality will appear in a slightly different way than it would if you had Internet Explorer.

If you have an old version of Netscape then it is advised that you upgrade your system to use Internet Explorer. It is recommended that even if you do have the most recent version of Netscape, it would be beneficial to change to Internet Explorer in order to be able to utilise the system optimally.

To access the online submission system

- Access the HTA's website at: www.hta.gov.uk/transplantation.cfm
- Click on the link for Accredited Assessors and then click on the link on the right hand side which says: [Enter the online submission system for AA reports](#)
- Enter your login and password.



HTA Online Applications Logon

HTA
Human Tissue Authority

This is the Human Tissue Authority's online submission system for reports and forms. This system is for Independent Assessors and Anatomy Schools only. Please enter your username and password. If you have forgotten your username and password please contact the HTA

Login Name:

Password:

User Name and/or password incorrect

- Select 'Accredited Assessors' from the list of applications



Logout

HTA Online Applications Logon

HTA
Human Tissue Authority


Application	Description
Accredited Assessors	Bone marrow and PBSC transplants

To start a new AA report

- Select the 'Edit AA reports' tab.
- Click on 'Create new report'.

End Session | Print

Accredited Assessors



Logon **Edit AA reports** Posted Summaries

[Create new report](#)

Action	Ref. ID	Date created
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- A new AA report appears at the top of the list.
- The system automatically generates the reference number for the report. You will receive this via an automatic email alert each time you save or submit a report.
- Click on the new report's reference number to open and edit it.

End Session | Print

Accredited Assessors



Logon **Edit AA reports** Posted Summaries

[Create new report](#)

Action	Ref. ID	Date created
Incomplete	Ref. No: B00015	23/03/2007
Incomplete	Ref. No: B00016	23/03/2007

Filling in an AA report

- All the sections of the report are listed at the top of it, if you click on these they will take you to that section. Alternatively you can scroll through the report to each section.



- All fields marked with an asterisk are mandatory. You will not be able to submit the report until all these fields have been completed. You will know if there are mandatory fields in a section which you still need to complete as that section will be in red in the list at the top of the report.
- The fields will only allow you to enter text which is appropriate for that field, for example, you can only enter letters into a field for a person's name or numbers into a field for a phone number.
- Some fields can only be edited if you have chosen the appropriate option before it, for example, you can only fill in the 'other' field after a question if you selected 'other' in the drop down menu directly preceding it.
- Some fields will automatically populate according to the information held in our system. These include:
 - AA unique identifier
 - AA first and last names
 - AA email address
 - HTA reference number

If any of this information is not correct please amend the field in the report and contact the HTA so we can update our records.

Dates

- Fields which require a date to be entered are either free text or require you to select the date from a calendar.
 - For free text fields please fill in the date in the format dd/mm/yyyy
 - For fields with a 'date' button next to them, click the button and select the appropriate date from the calendar then click on 'update'.

Drop down menus

- Please note that after you have selected an item from a drop down menu, you must click outside of the box before using the scroll button on your mouse. If you do not do this you will scroll through the drop down list options and change your selection.

To save an AA report

- To save a completed or partially completed report and return to it later click 'save changes' at the end of the report.

Review [Go to save/cancel](#)

HTA Comments

Clarification sought from AA

-select option

Save Changes Cancel

- You can get to the save button either by scrolling to the bottom of the report or clicking on the link 'save/cancel' which appears at the top of each section.

Section F [Go to save/cancel](#)

31. Please give a brief summary of the discussion had with the donor (and the person accompanying the donor as appropriate) and recipient / partner to date, in order to determine (as far as possible) that there was no evidence of duress or coercion affecting the decision to give consent, or any evid

32. I confirm that the donor (and the person accompanying the donor as appropriate) understands they are able to withdraw consent at any time and understands consequences of withdrawal for the recipient / partner. *

Please check the box to confirm the above statement

Section G [Go to save/cancel](#)

- After clicking 'save changes' click on 'Return to user summary'. This takes you back to the main screen.

Information Saved.

[Return to user summary](#)

- An automatic email alert is sent to you confirming that you have saved the report and includes the reference number.
- If you click 'cancel' at the end of the report you will return to the main screen without saving your changes.

To edit a saved AA report

- Select the 'Edit AA reports' tab.

- Select the report from the list you wish to edit by clicking on its reference number.

End Session | Print

Accredited Assessors



Logon Edit AA reports Posted Summaries

[Create new report](#)

Action	Ref. ID	Date created
Incomplete	Ref. No: B00015	23/03/2007
Incomplete	Ref. No: B00016	23/03/2007

- You can continue to save your amendments as many times as you wish before submitting the report.

To submit an AA report

- To submit a completed report, select the 'Edit AA reports' tab.
- Once you have completed all the mandatory fields in a report the entry in the Action column on the left hand side will change from 'Incomplete' to 'Submit data'

End Session | Print

Accredited Assessors

HTA Human Tissue Authority

Logon **Edit AA reports** Posted Summaries

[Create new report](#)

Action	Ref. ID	Date created
Submit data	Ref. No: B00015	23/03/2007
Incomplete	Ref. No: B00016	23/03/2007

- Click on 'Submit data' next to the reference number of the report you wish to submit.
- An automatic email alert is sent to you confirming that you have submitted the report and includes the reference number. Please note that once you have submitted a report you can not make any further amendments to it.
- Important note: Once submitted the report will no longer be displayed in the list on the 'Edit AA reports' tab. If it is still displayed then you have not submitted to the HTA.

To view a submitted AA report

- Select the 'Posted' tab.
- Click on the reference number of the report you wish to view.

End Session | Print

Accredited Assessors

HTA Human Tissue Authority

Logon Edit AA reports **Posted** Summaries

Status	Ref. ID	Date created	Date submitted
Submitted	Ref. No: B00015	23/03/2007	23/03/2007

- Please note that you cannot make any further amendments to the report.

To print an AA report

- The 'Print' button at the top of the report allows you to print your report at any stage of the process.



Section Links (Red section links indicate missing mandatory data)

- Section A
- Section B
- Section C

Searching for reports





- Click on the 'Logon' tab
- There is a search function on this page which allows you to search for a report by either the transplant unit or case reference number.
- Click on the arrow next to the field you wish to search by and select either the unit name or case number from the drop down list.



Welcome user

First name:	Bone1
Surname:	Marrow1
Organisation:	HTA - Human Tissue Authority

Search

Transplant unit	<input type="text" value="-select option-"/>		
Ref. ID	<input type="text" value="-Select Ref No-"/>		
User	<input type="text" value="Bone1 Marrow1"/>		
<input type="button" value="Search"/>		<input type="button" value="Clear"/>	

Results

- The search will filter the list at the bottom of the page to show only those reports which match the criteria you selected.
- To list all of your reports, leave the transplant unit and reference ID fields blank. Check that your name appears in the user field and click on 'Search'
- To view a report, click on the reference number.

Report submission summary

- To view details of the reports you have submitted to date, click on the 'Summaries' tab
- Select 'Total AA reports submitted'

The screenshot shows the HTA Accredited Assessors interface. At the top, there are links for 'End Session' and 'Print'. The main header reads 'Accredited Assessors' and features the HTA logo (Human Tissue Authority). Below this is a navigation bar with tabs: 'Logon', 'Edit AA reports', 'Posted', and 'Summaries' (which is highlighted). Under the 'Summaries' tab, a table is displayed with two columns: 'Summary name' and 'Description'. A red arrow points to the link 'Total AA reports submitted' in the 'Summary name' column. The corresponding 'Description' is 'All reports submitted so far'.

Summary name	Description
Total AA reports submitted	All reports submitted so far

- A new window will be open which summarises the number of reports you have submitted according to the following criteria:
 - Transplant type
 - Transplant category
 - Your recommendation
 - HTA decision

7. Specific guidance for completing the report

Below is specific guidance for some of the questions on the report:

General Notes

In the free text fields, you should aim to provide concise but informative responses. . It is important to remember when completing these fields that the information you provide is the only information that the HTA has on which to base its decision on a case. The maximum word limit on these fields is 1500 characters.

Section A

3. and 8. NHS/CHI number

The CHI (Community Health Index) number is often used in Scotland as the unique patient identifier

Section B

10. Contact details of the stem cell transplant coordinator

The clinician's referral should include email contact details of the stem cell transplant coordinator. This is to ensure that s/he can be informed of the HTA's decision.

Please ensure that the correct email address is entered (with the @ sign) as this will be the address we send a notification of the decision to.

12. Contact details of the donor's clinician

The clinician's referral should include email contact details of the clinician responsible for the donor. This is to ensure that s/he can be informed of the HTA's decision.

Please ensure that the correct email address is entered (with the @ sign) as this will be the address we send a notification of the decision to.

13. The referring unit

The referring unit is the hospital where the donor is worked up. This will usually be the unit that nominated you.

14. The stem cell transplant unit

The stem cell transplant is the hospital at which the surgery will take place. In some cases this will be the same as the referring unit.

Section D

The written referral from the clinician should contain a copy of the form HTA IT (DC) if an independent translator has been required (see Section 7 of Guidance document for further detail).

21. Communication difficulties

If there were communication difficulties with either the donor or the recipient / partner then questions 25 to 28 are mandatory. If there were no communication difficulties go to question 28.

25. Type of communication difficulties.

More than one of the following options may be selected: 'Language', 'Hearing', 'Speech', 'Other'.

If language is selected then questions 26 and 27 are mandatory.

For all other options go to question 27.

Section E

Question 27 allows for free text. Please ensure that you provide enough detail for the HTA to be able to make decision on a case.

Section F

Questions 28 to 30 are mandatory.

Question 30 allows for free text. Please ensure that you provide enough detail for the HTA to be able to make decision on a case.

Section G

All parts of this section are mandatory.

In (ii), one of the 3 options must be selected.

You should also give a summary of why you have selected this choice.