How to Manage Specimens

Current version when this document was written	v5.2.15
Last verified as accurate	December 9, 2020

To manage Specimens, click either the blue **View Specimens** button or select **Specimen Maintenance** from the **More…** menu.

View Specimens	Test Results & Lab Checkin
More … ▼	When Viewing an Accession

The **Specimen Maintenance** page displays each specimen included in the accession.

**Specimens** and their complete details are listed on the left with their corresponding **Requested Tests** on the right.

Each specimen in the accession will be listed with a grey **Plus** button to view the complete details and options for managing a specimen.

+

To view complete details and manage specimens all at once, click the blue **+ Expand All** button.

+ Expand All

Alternatively, click the blue **- Collapse All** button to hide the details and management options for all specimens.
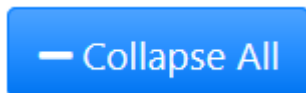
— Collapse All

Sticky Notes and the red **Marked as Untestable** label are still visible when viewing specimens in collapsed view.

Specimens can be filtered by:

- **Specimen Type**
- **Specimen Type Descriptor**
- **Ordered Tests**
- **Transport Medium**
- **Taxon**

Filter specimens ✕

Specimen Type 🔍

Specimen Descriptor 🔍

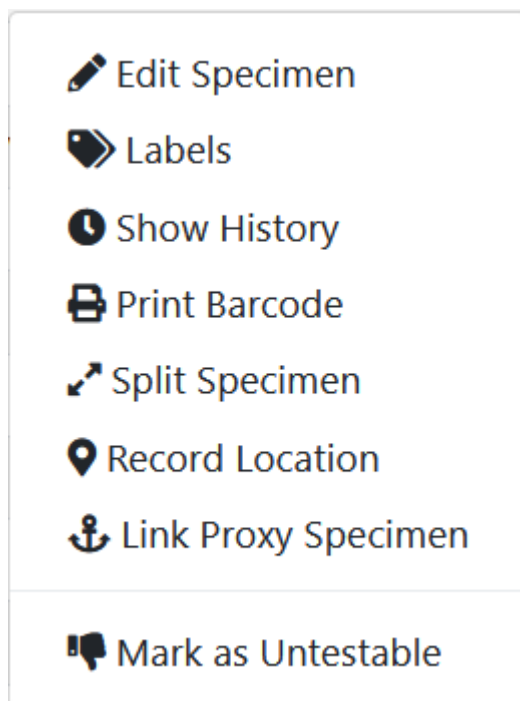Ordered tests 🔍

Transport Medium 🔍

Taxon 🔍

Filter   Close

Specimen Details

A grey shaded status label appears as 'Unchanged' by default, indicating the specimen has not been pooled or split.

Each Specimen provides a black kebab icon containing specimen management options.

Click the black kebab icon and select an option below:

- ✏ Edit Specimen
- 🏷 Labels
- 🕐 Show History
- 🖨 Print Barcode
- ↗ Split Specimen
- 📍 Record Location
- ⚓ Link Proxy Specimen

- 👎 Mark as Untestable

Edit Specimen

The **Edit Specimen** window appears.

Edit Specimen   ✕

Specimen Type *	Whole Blood (Whole Blood) ▾
Specimen Type Description	Red Blood Cells ▾
Transport Medium *	Red Top Tube (RTT) ▾
Name	
Collection Date	12/03/2020 📅
Condition	neutral ▾
Comments	**B** *I* S̶ U̲ ↶ ↷

```
|
```

0

Cancel   Save Changes

Make any necessary updates and click the blue **Save Changes** button to return to the Specimen
Maintenance page.

Manage Labels

The **Labels** window appears.

Labels   ✕

Selected Labels

`Diagnostic`

Available Labels

Type to search...

`Auto-Pay` `Regulatory Tests` `Export` `STAT` `NPIP 145 Breeders` `NPIP 146 Commercial` `Legal/Insurance`
`Reportable Disease` `Zoonotic` `Select Agent` `Epidemiology Trace` `HDYH - Online` `HDYH - Other Veterinarian`
`HDYH - Other Laboratory` `HDYH - Trade Show` `HDYH - Other` `ClinPath Review` `Purple!!`

Add or remove necessary labels and click the 'x' to return to the Specimen Maintenance page.

Show History

The **Show History** window appears.

Review history and click the grey **Close** button to return to the Specimen Maintenance page.

Record Location

The **Record Location** window appears.

Select a location from the drop down menu and click the blue **Record Location** button to return to the Specimen Maintenance page.

Mark as Untestable

The **Mark as Untestable** window appears.

Enter any necessary comments and click the blue **Mark as Untestable** button to return to the Specimen Maintenance page.

The red **Marked as Untestable** badge will appear for the specimen, even when specimen details are collapsed.

Link Proxy Specimens

The **New Specimen Proxy** window appears.

Enter an **Alternate Specimen Number** and click the blue **Create** button to return to the Specimen Maintenance page.

Linked specimen proxies will be listed on the **Specimen Proxies** index.

Note: *The linking of a* **Specimen Proxy** *is only needed when trying to integrate a new instrument. This allows for taking instrument data from a production environment and mapping that data to a different specimen in the development/test database. Once a* **Specimen Proxy** *has been linked, it will appear in the* **Specimen Proxy** *index in the* **Reference Data** *menu.*

Update Specimen Type

Note: *To update the Specimen Type, you will not click the black kebab icon. Instead, click the grey* **More…** *button in the top right corner.*
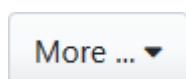
The Update All Specimen Types window is displayed.

Select the new Specimen Type and, if needed, enter a Specimen Type Description.

Click the blue **Update Specimen Types** button to return to the Specimen Maintenance page.

Pool Specimens

To pool specimens, check the box to the left of the necessary specimens and click the blue **Pool Specimens** button.

The **Pool Specimen** window appears.

On **Step 1: Settings**, the number in the pool will default to the number of specimens selected. If

desired, set the number of specimens per pool.

The pool names default to 'Pool #1,' 'Pool #2,' 'Pool #3', and so on. If needed, rename the new pooled specimens.

Click the blue **Next** button to continue to the pooling details.

On **Step 2: Details**, set the details for the pooled specimens and, if desired, check the box to 'Apply all tests' and click the blue **Pool Specimens** button.

The grey shaded status for the specimen will change from 'Unchanged' to 'Pooled Group Specimen'.

Hovering the cursor over the grey 'Pooled Group Specimen' status will display the original specimen

numbers included in the pool.

Edit Specimen Pool

To add or remove specimens to/from a pool, click the black kebab icon for the pool and select the **Edit Specimen Pool** link.

Test Original Specimens

To keep the pooled specimen while also testing the original specimens, click the black kebab icon for the pool and select the **Test Original Specimens** link.

The individual specimens will be displayed, as well as the pooled specimen.

Delete Pool

To delete the pool and revert the original specimens back to their original status, click the black kebab icon for the pool and select the **Delete Pool** link.

The pool will no longer exist on the list of specimens.

Split Specimens

To split specimens, check the box to the left of the necessary specimens and click the blue **Split Specimens** button.

The Split Specimen(s) window appears.

On **Step 1: Settings**, enter the number of sub-specimens to be created and click the blue **Next**

button.

On **Step 2: Details**, check the boxes to 'Keep Original' and/or 'Copy Tests' when needed and enter details.

Click the blue **Split** button and the grey shaded status for the specimen(s) will change from 'Unchanged' to 'Original Specimen' and 'Split from Original.'

☐ **−** **0**

Original specimen

Labels	
Specimen Number	⋮ **M203440001-3**
Animal ID	**Kendall**
Specimen Type	Whole Blood (Whole Blood)
Specimen Type Description	Smear
Transport Medium	Red Top Tube (RTT)
Collection Date	December 04, 2020 12:00 AM
Condition	neutral
Comments	
Recorded Location	
Current Custody	

No requested tests.

+ Add Test

☐ **−** **0**

Split from original

Labels	
Specimen Number	⋮ **M203440001-3-1**
Animal ID	**Kendall**
Specimen Type	Whole Blood (Whole Blood)
Specimen Type Description	Smear

No requested tests.

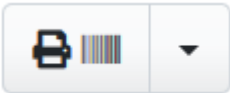**+ Add Test**

To view details of the original specimen, click the black kebab icon for the split specimen and select **Show Original**.

Print Barcodes

To print the barcode label for specimens, check the box to the left of the necessary specimens and click the grey **Print Barcodes** button.

The default label will be printed.

To print a different format of label, click the black triangle to be presented with the barcode label options.

Manage Requested Tests

For each specimen listed on the left, the test(s) ordered are listed on the right.

Each Test provides a black kebab icon containing requested test options.

Cancel a Test

To cancel a test, click the black kebab icon and select **Cancel Test** from the drop down menu.

Click the red **Confirm** button to confirm cancellation of the test.

Delete a Test

To delete a test, click the black kebab icon and select **Delete Test** from the drop down menu.

Click the red **Confirm** button to confirm deletion of the test.

Add a Test

Click the grey **+ Add Test** icon for the Specimen for which the test will be ordered.

The Order Test window will be presented:

For more details on ordering tests, please visit our **How to Order Tests** article.

View/Add Test Results

To view and/or add test results tests included in the accession, click the grey **More…** button in the top right corner.
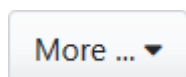
Select **View/Add Test Results** from the drop down menu and the Test Result Entry page will be displayed.

For more details on entering test results, please visit our **How to Manage Test Results** article.

From:
https://kb.tracefirst.com/ - **Trace First Knowledge Base**

Permanent link:
https://kb.tracefirst.com/doku.php?id=coreone_for_labs:manuals:how_to_manage_specimens

Last update: **2020/12/10 00:10**