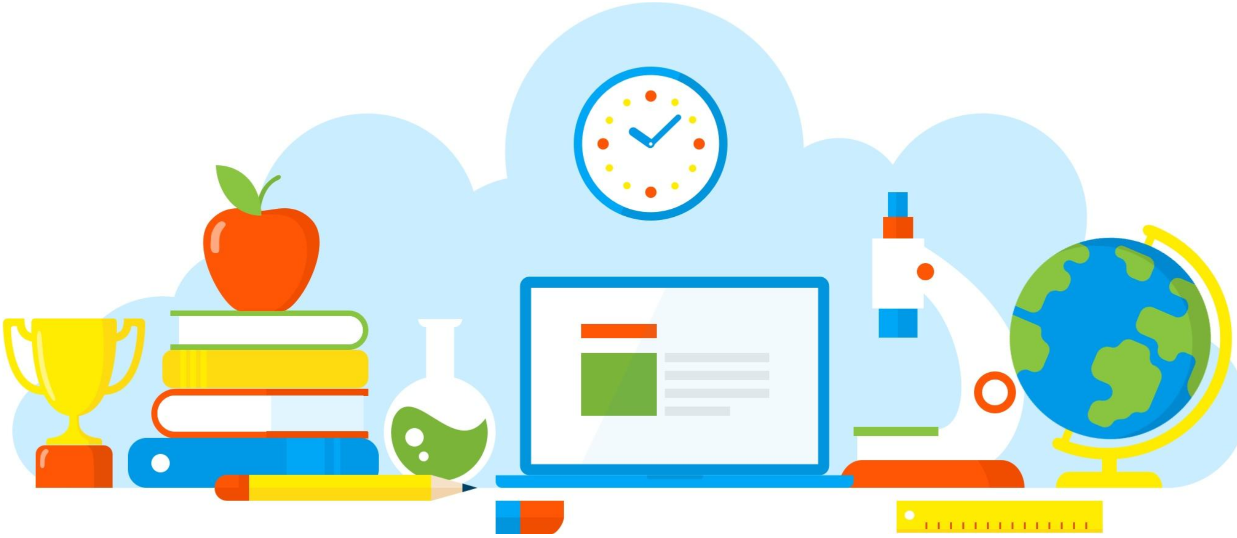

All About Accessions

Describing the different parts of an accession, and their relationships

TraceFirst *CoreOne for Labs*
August 01, 2019

Accessions

Accessions are the objects for which *CoreOne for Labs* was built to manage. There are many parts which constitute an accession, and these parts can vary from accession to accession. Some examples of these parts are: animals, specimens, tests, results, comments, attachments, and more.

Accession Case Example

Cash is a 12-year-old lab mix with a growth on one of his front paws. His owner, Bill, takes Cash to the local vet clinic to find out what it is. The vet takes a biopsy of the growth tissue to send to a lab for diagnosis. This is where the accession begins.

Accession Lifecycle

Client Submission → Lab Receiving & Data Entry →

Lab Check-in → Test Results Entry → Comments → Release for Review →

Coordinator Review → Publish Results to Client → Bill Client

1. Client Submission

On the accession (or test request form) the vet lists the details of Cash and his abscess, and may include the name and details of the owner, Bill, as well. The vet will submit this form, along with the biopsied abscess tissue sample, to the lab for diagnostic testing.

2. Lab Receiving & Data Entry

Once the test request is received by the lab, it becomes an official accession. A person will unpack the sample specimen and enter the details of the accession into the lab's LIMS (laboratory information management system = *CoreOne for Labs*). This receiving and data entry process varies slightly from lab to lab. The goal is to quickly get the accession details entered so the lab technicians can see what specimens they will be testing. A point that sets *CoreOne for Labs* above the competition is the speed at which we process these accessions.

3. Lab Check-In

Labs have many departments, or lab sections (Bacteriology, Serology, Molecular Diagnostics, etc.). Each lab section has a large set of tests specific to their department.

It is common for tests to be ordered/requested from more than one lab section for one specimen. For example, a specimen may require a test from the Necropsy lab section and one or more test from the Clinical Pathology lab section. We call these accessions multi-lab accessions, as they include more than one lab section.

The parts of an accession can have a one-to-one or a one-to-many relationship. In other words, an accession can contain one animal, or several. For each animal, one specimen may be provided, or many samples may be provided. For each specimen, one test can be ordered, or several tests can be ordered.

4. Test Results Entry

Once a specimen reaches a lab section to be tested, the lab technician will turn to *CoreOne for Labs* to review the details of the accession and enter the results of the test(s). They then ‘Check-in’ the specimen(s) and may be required to ‘Mark in Custody’ to track chain of custody for the specimen.

5. Comments

The lab tech may add comments at different levels of the accession. For example, they may add a comment about a single specimen itself, or about the results for a specific specimen, or they may add a comment pertaining to their lab section (in multi-section accessions), or the accession as a whole.

6. Release for Review

When all results and comments have been entered, test results are released for coordinator review and approval. Test results can be released per test, or for all tests in a lab section. It is possible for lab sections on a multi-section accession to be in different stages of processing the specimen(s). For example, Serology may have entered and released all results, but Clin Path is still awaiting final results to be evident.

7. Coordinator Review

The purpose of the coordinator review is to ensure that a second, more experienced set of eyes reviews the test results, comments, and additional details for accuracy. A single test result could mean one thing on it's own and something different when taking other related test results into account. Reviewers can reject or edit test results, add accession comments, and publish/finalize the accession.

8. Publish Results to Client

When the results have been reviewed by a coordinator, and the accession has been finalized, the coordinator will publish the findings to the client. A final report is emailed to the client with the details the lab has chosen to include. That's correct, some findings can be kept private and the client will not see them.

9. Bill Client

When an accession is first created, an invoice is also created for the accession. As the accession begins to add tests, the price tag increases. Each accession generates an invoice. Invoices can be paid one-at-a-time; however, most clients opt to pay on a monthly basis for all accessions/invoices listed on their monthly statement.

Parts of an Accession (Basics)

Animals

Animals are the primary basis for each accession. It is possible to have an accession that only contains a 'Non-Animal Specimen,' although that is not common. It is more common that this type of specimen would be including on an accession with animal specimens.

Chickens, pigs, cows, and horses are some of the most commonly tested animals, so most accessions we work with will have these animals. Sheep, goats, dogs, cats, fish, and other animals are also tested. It's important to point out here that certain tests can only be performed for specific breeds, or taxons, of animals, rather than on all animals.

Specimens

Specimens are the samples from an animal that are being submitted for testing. An animal may need to submit several samples, of varying types for proper diagnosis. For example, while one animal may provide only one specimen to be tested (Whole Blood), other animals may provide two or more samples for testing (Tissue, Serum, Whole, Blood, Fecal, etc). Specimens can be split or pooled, or marked as untestable and/or damaged in transit.

Specimen Comments

Specimen comments are comments that a lab staff user may add regarding a specimen. These may be deemed 'Visible to Public' so clients can read the comments, or 'Private' to be used internally only. These comments have nothing to do with the animal as a whole, the requested test(s), or the lab section, but specifically the specimen to which you are adding the comment.

Tests

Tests are the science-y things lab technicians get paid the big bucks to understand and perform. :) There are thousands of tests to choose from, and the same test can vary from lab to lab. Test structure is an important and complex topic, which requires more study. Please refer to our **Test Structure Guide** in the *CoreOne for Labs* KB document library to familiarize yourself with how tests are structured and how they can be maintained.

Test Results / Definitions

Test Results are configured by the client and are highly customizable. Test results can be defined by using various data field types. For example, Numeric, Text, Dropdowns, Checkboxes, Formulas, etc.

We have been given permission to use the standard test result definitions and test structure developed by TVMDL, however, some clients may prefer to migrate their existing structure. For this reason, it is key to understand how to swiftly adjust test result definitions to suit the user's needs.

Test Result Definition Parameters

Test Result Definitions can have additional Parameters specified. For example, a numeric value may require a range determining if the results are Low, Normal, or High. To achieve this range, parameters can be used. To take it a step further, different numeric ranges can be specified as Normal for different species, etc. To reiterate, tests are highly complex and varied.

Specimen Test Comments

Specimen test comments are comments that a lab tech or coordinator/reviewer may add regarding a specimen's test results. These comments are not to be confused with the Specimen Comments, which are irrelevant of the tests ordered. As with other comments in *CoreOne for Labs,* they may be deemed 'Visible to Public' so clients can read the comments, or 'Private' to be used internally only.

Specimen Test Schedules

Tests are added to an accession via being ordered on a specimen. "Specimen Test Schedules" means "Test(s) ordered for this specimen." Why? Texas has a lab in four different cities, and not all tests are available at all locations. Also, some tests have different 'schedules' depending upon which lab location they are performed. While a test is available all day M-F at one location, it may only be available on Mondays at another location. This is why we use the term "Specimen Test Schedules."

Lab Section Assignments

Lab Section Assignments are the lab sections (Clin Path, Serology, Virology, Molecular Diagnostics, etc) involved in the accession. When an accession is created, one or more labs sections is added. Also, when a test is ordered from a lab section not already on the accession, that lab section will become a lab section assignment for that accession. It is common for an accession to have more than one lab section assignment, i.e., multi-section accessions. Histopathology and Necropsy are two lab sections commonly on the same accession. Clinical Pathology is an example of a lab section that is commonly on the same accession as various other lab sections, often several.

Coordinators

Lab sections on the accession determine the coordinator(s) involved with the accession. Coordinators are responsible for reviewing the test results and comments from the lab tech(s) and approving, editing, or rejecting the results. Only once a coordinator has confirmed and published their section(s) can an accession be finalized, sending the client the results report and the invoice and thus, completing the accession lifecycle.

Attachments

Attachments are scanned documents that are attached to the accession. When the accession is received, the paper forms can be scanned and attached to the accession. Another example of attachments are test results and images. Once an accession has been finalized, the results report and invoice that are sent to the client are listed as PDF attachments for the accession as well.

Exercises

To complete these exercises, please refer to [our user documentation] for step-by-step instructions. The [Quick Start Guide] is a good place to begin. If you get stuck or need clarification, ask Daisy for assistance.

1. Create an Accession

Log in and select a ‘Receiving’ role.

[How to Create an Accession]

[How to Enter Accession Details]

2. Perform Lab Check-in

Switch roles to the Lab Tech role for each of the sections on the accession.

[How to Perform Lab Check-In]

How to Order Tests (at least one from more than one lab section)

Add, Edit, and Release Results: How to Manage Test Results

3. Finalize an Accession

Switch roles to the Lab Section Head role for each of the sections on the accession.

How to Manage Section Coordination (log in as a section coordinator for one of the assignments on the accession)

Switch roles to the Master Coordinator role for the accession.

How to Manage Master Coordination (log in as master coordinator for the accession)

4. Find Any Accession with Universal Search

Switch roles to the Superuser Admin role.

How to Use Universal Search

NOTE: Universal Search Show is different than Accession Show; More Menu esp.

5. Finance / Accounting

Switch roles to the Superuser Admin role.

Finance Guide

6. Create Portal Submission

Switch roles to the TVMDL Portal User role.

Create Portal Submission

Client Portal Guide

Switch back to the Superuser Admin role and go to Receiving to “Receive” your portal submission, thereby upgrading it to an accession.

7. Review KB Docs for More

By now, you should have been introduced to the most important aspects of any accession. Since *CoreOne for Labs* is so robust, there is much more that can be going on for a given accession. Please remember that you don't have to know everything about the product, just know that everything should be covered in our KB documents.

CoreOne for Labs KnowledgeBase Documentation

If you cannot find the information you are looking for in the KB, please ask Daisy for assistance. If the article does not exist, she can create one.