

# How to Manage Specimens

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

<b>View Specimens</b>	Test Results & Lab Checkin
<b>More ...</b> ▼	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.

The screenshot displays the 'Specimen Maintenance' interface for accession M203440001. The page header includes navigation links like 'Home', 'Laboratory', 'Case Coordinator', 'Test Menu', and 'Universal Search'. The main content area shows a list of specimens with columns for 'Specimens' and 'Requested Tests'. Each specimen entry includes a checkbox, a plus button, a specimen ID, a description, and a 'No requested tests.' status. A 'Send Message' button is located next to the accession number. The page also features a 'Filters' section with '+ Expand All' and '- Collapse All' buttons.

Specimens	Requested Tests
<input type="checkbox"/> + 0 Kendall :: M203440001-1 :: Whole Blood :: Red Blood Cells	No requested tests. <a href="#">+ Add Test</a>
<input type="checkbox"/> + 0 Kendall :: M203440001-2 :: Whole Blood :: Red Blood Cells	No requested tests. <a href="#">+ Add Test</a>
<input type="checkbox"/> + 0 Kendall :: M203440001-3 :: Whole Blood :: Smear	No requested tests. <a href="#">+ Add Test</a>
<input type="checkbox"/> + 0 Kendall :: M203440001-4 :: Whole Blood :: Smear	No requested tests. <a href="#">+ Add Test</a>
<input type="checkbox"/> + 0 Kendall :: M203440001-5 :: Serum :: Acute	No requested tests. <a href="#">+ Add Test</a>
<input type="checkbox"/> + 0 Kendall :: M203440001-6 :: Serum :: Acute	No requested tests. <a href="#">+ Add Test</a>
<input type="checkbox"/> + 0 Kendall :: M203440001-7 :: Serum :: Fasted	No requested tests. <a href="#">+ Add Test</a>
<input type="checkbox"/> + 0 Kendall :: M203440001-8 :: Serum :: Fasted	No requested tests. <a href="#">+ Add Test</a>

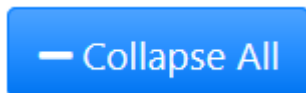
Each specimen in the accession will be listed with a grey **Plus** button to view the complete details and options for managing a specimen.



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



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



**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

Q

Specimen Descriptor

Q

Ordered tests

Q

Transport Medium

Q

Taxon

Q

Filter

Close

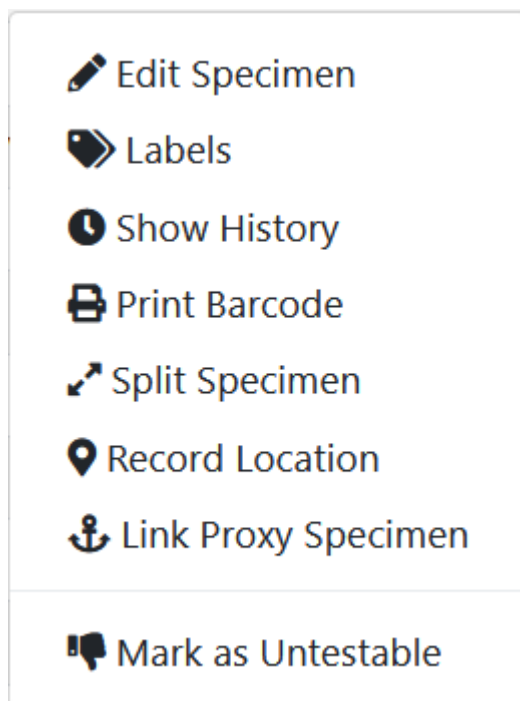
## Specimen Details

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

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* ~~S~~ U

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.

Show Specimen History <span>×</span>			
Event Type	By User	Lab Section	Created At
A183620001-2 data attributes updated - MRT			12/28/2018, 9:42:48 am
A183620001-2 data attributes updated - MRT			12/28/2018, 9:52:49 am
E.coli (PCR) test results recorded on A183620001-2			12/28/2018, 7:54:44 pm
Split specimen.			12/31/2018, 9:58:33 am
			<span>Close</span>

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

## Record Location

The **Record Location** window appears.

📍 Record Location for M203440001 ×

Select Location 

Cupboard #4 :CUP4 (FC: Molecular Diagnostics (M))

Close 📍 Record Location

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.

🗨 Mark as Untestable ×

Comments 

**B** **I** **S** **U**

0

Close Confirm

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.

The screenshot shows a web browser window with the title 'CoreOne for Labs'. The address bar shows the URL 'https://dev.labs.tracefirst.com/specimen\_proxies/new?'. The page header includes 'COREONE FOR LABS', 'Training', and a user profile 'ddeknight@tracefirst.com'. The navigation menu has 'Home', 'MRT', and 'Laboratory'. The breadcrumb trail is 'Home > Specimen Proxies > New'. A 'Back' button is in the top right. The main heading is 'New Specimen Proxy'. The form contains the following fields:

Accession	A183620001 - Friday, Dec 28 2018 04:41:39 PM - Miss Daisy Acres
Specimen	A183620001-2
Alternate Specimen Number *	<input type="text"/>

A blue 'Create' button is at the bottom of the form.

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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.

The screenshot shows a web browser window with the address bar displaying <https://dev.labs.tracefirst.com/sp>. The page title is "COREONE FOR LABS". The breadcrumb navigation shows "Home > Specimen Proxies". A "Back" button is located in the top right corner. The main heading is "Specimen proxies". Below it is a table with two columns: "Our specimen" and "Proxy specimen number". Each row in the table has a red "Delete" button to its right.

Our specimen	Proxy specimen number	
CS183200007-4	test1268	Delete
CS183230001-3	C101010101	Delete
CS183230001-3	c2029209109	Delete

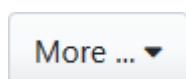
You can create new Specimen Proxies from the Specimen Management screen.

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**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.

Update Specimen Type

Specimen Type \*

Nothing selected

Specimen Type Description

Nothing selected

Close

Update Specimen Types

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.

Pool Specimen

The **Pool Specimen** window appears.

Pool Specimens

1

Settings

2

Details

Specimens per pool #

4

Specimens	Pools
M203440001-1	Pool #1
M203440001-2	
M203440001-3	
M203440001-4	
M203440001-5	Pool #2
M203440001-6	
M203440001-7	
M203440001-8	

Cancel

Next

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.

Pool Specimens

1

2

Settings

Details

Specimen Type \*

Nothing selected

Specimen Type Description

Nothing selected

Transport Medium \*

Nothing selected

Collection Date

12/03/2020

Condition

neutral

Comments

B I S U

Apply All Tests

☐

Cancel

Pool Specimens

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'.

☐

- 0

No requested tests.

+ Add Test

Pooled group specimen

Labels

Name

Pool #1

Specimen Number

M203440001-9-P

Animal ID

Kendall

Specimen Type

Whole Blood (Whole Blood)

Transport Medium

Tube (Tube)

Collection Date

December 04, 2020 12:00 AM

Condition

neutral

Comments

Recorded Location

Current Custody

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.

Edit Specimen Pool - Pool #1

+ Add specimens

Specimen Number	Specimen Type	Transport Medium	Collection Date	Condition	
M203440001-1	Whole Blood (Whole Blood)	Red Top Tube (RTT)	December 04, 2020 12:00 AM	neutral	
M203440001-2	Whole Blood (Whole Blood)	Red Top Tube (RTT)	December 04, 2020 12:00 AM	neutral	
M203440001-3	Whole Blood (Whole Blood)	Red Top Tube (RTT)	December 04, 2020 12:00 AM	neutral	
M203440001-4	Whole Blood (Whole Blood)	Red Top Tube (RTT)	December 04, 2020 12:00 AM	neutral	

<

>

Close

## 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.

Split Specimens

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.

Split Specimen(s)

1

Settings

2

Details

Split into #

2

Number	Type
M203440001-3	Whole Blood (Whole Blood)
M203440001-4	Whole Blood (Whole Blood)

Cancel

Next

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

Split Specimen(s)

1

Settings

2

Details

☒ Keep Original

☐ Copy Tests

Specimens	#	Type	Type Description	Transport Medium
M203440001-3	1	<div>Specimen Type</div>	<div>Specimen Descriptor</div>	<div>Transport Medium</div>
M203440001-4	2	<div>Specimen Type</div>	<div>Specimen Descriptor</div>	<div>Transport Medium</div>

Cancel

Split

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

No requested tests.

+ Add Test

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

☐

-

0

Split from original

No requested tests.

+ Add Test

Labels

Specimen Number

⋮ M203440001-3-1

Animal ID

Kendall

Specimen Type

Whole Blood (Whole Blood)

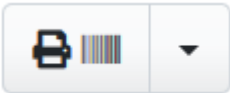
Specimen Type Description

Smear

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:

**Order Tests**

Specimen Number:

Taxon:

Specimen Type:

Specimen Descriptor:

**F201890001**

- ↓ Minnie House Mouse :: NFS
  - ↓ F201890001-1 Whole Blood (Red Blood Cells)
    - No tests Ordered.
  - ↓ F201890001-2 Serum (Acute)
    - No tests Ordered.
- ↓ Mickey House Mouse :: NFS
  - ↓ F201890001-3 Whole Blood (Red Blood Cells)
    - No tests Ordered.
  - ↓ F201890001-4 Serum (Acute)
    - No tests Ordered.

Search tests...

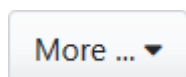
Lab Sections:  All Labs

1241 Anaplasma marginale (rtPCR) F: Molecular Diagnostics (M)	8039 Avian Bornavirus (PCR) [Referral] F: Molecular Diagnostics (M)	1242 Avian Influenza Matrix (rtPCR) F: Molecular Diagnostics (M)	1243 Avian Influenza Virus Subtype H5 (rtPCR) F: Molecular Diagnostics (M)
1244 Avian Influenza Virus Subtype H7 (rtPCR) F: Molecular Diagnostics (M)	1245 Avian Paramyxovirus Type 1 Matrix (rtPCR) F: Molecular Diagnostics (M)	8099 Avian Polyomavirus (PCR) [Referral] F: Molecular Diagnostics (M)	1252 Bovine Coronavirus (rtPCR) F: Molecular Diagnostics (M)
1254 Bovine Herpesvirus Type 1 (rtPCR) F: Molecular Diagnostics (M)	1255 Bovine Influenza D Virus (rtPCR) F: Molecular Diagnostics (M)	1258 Bovine Parainfluenza 3 Virus (rtPCR) F: Molecular Diagnostics (M)	1259 Bovine Respiratory Syncytial Virus (rtPCR) F: Molecular Diagnostics (M)
1260 Bovine Viral Diarrhea Virus (rtPCR) F: Molecular Diagnostics (M)	8108 Brachyspira hyodysenteriae/hampsonii (rtPCR) [Referral] F: Molecular Diagnostics (M)	1261 Bunyavirus & Cache Valley Virus (PCR) F: Molecular Diagnostics (M)	1263 Campylobacter fetus Differentiation (rtPCR) F: Molecular Diagnostics (M)
1264 Campylobacter jejuni (rtPCR) F: Molecular Diagnostics (M)	8069 Canine Influenza Virus Subtype H3N8 (HI) [Referral] F: Molecular Diagnostics (M)	8104 Canine Parvovirus Genotyping [Referral] F: Molecular Diagnostics (M)	1273 Classical Swine Fever Virus (rtPCR) F: Molecular Diagnostics (M)

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.

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

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