How to Create Accessions

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Accessions can be created as a standard accession, or they can be created as a group accession (for example, poultry houses).

To create an accession from the **Receiving** dashboard, click the blue **New** button at the top of the screen.

The new accession number is generated and displayed at the top of the page in bold.

Note: For details on creating accessions from the **MRT** dashboard, please visit our **How to Enter Accession Details** article.

Enter Accession Basics

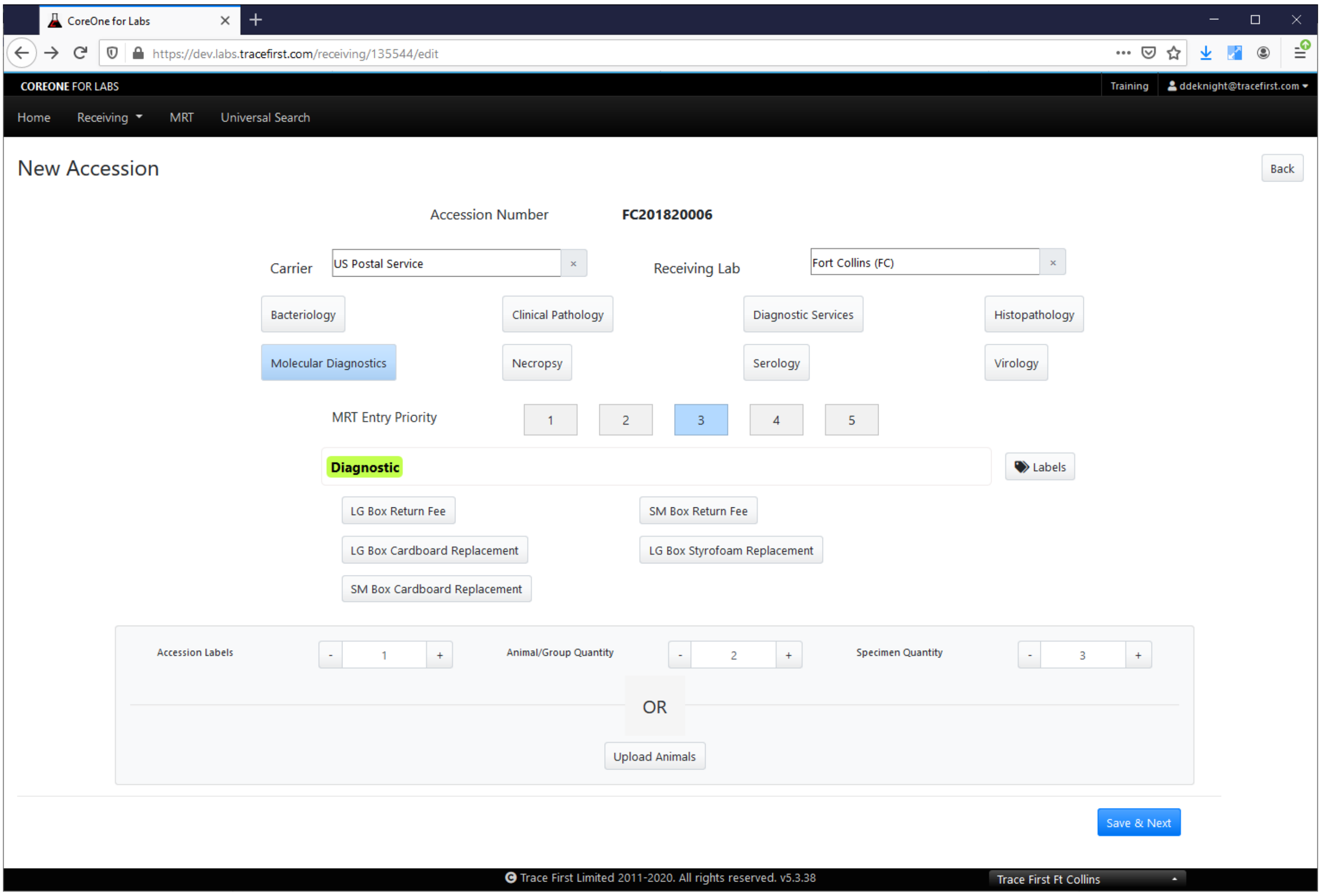
Select the mail **Carrier** that delivered the package on the left.

The **Receiving Lab** on the right displays the name of the lab location, and the corresponding lab sections will be displayed below.

If a user has access to more than one lab, they can select the desired **Receiving Lab** from the drop down menu. The lab sections displayed will update based on the **Receiving Lab** selected.

Click the lab section(s) the accession will require.

The **MRT Entry Priority** is set automatically based on the selected lab section(s). Users can update the **MRT Entry Priority** manually when desired.



If there are any necessary packaging fees, click to add them.

Next, set the **Accession Labels**, **Animal/Group Quantity**, and the **Specimen Quantity**.

Note: *If you do not see the number of* ***Accession Labels*** *displayed to the left of the* ***Animal/Group Quantity*** *and the* ***Specimen Quantity****, it means your user profile has not been associated with a default printer. Ask your local system administrator for assistance setting a default printer.*

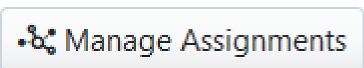
Click the blue **Save & Next** button to move to the animal & specimen basic detail entry.

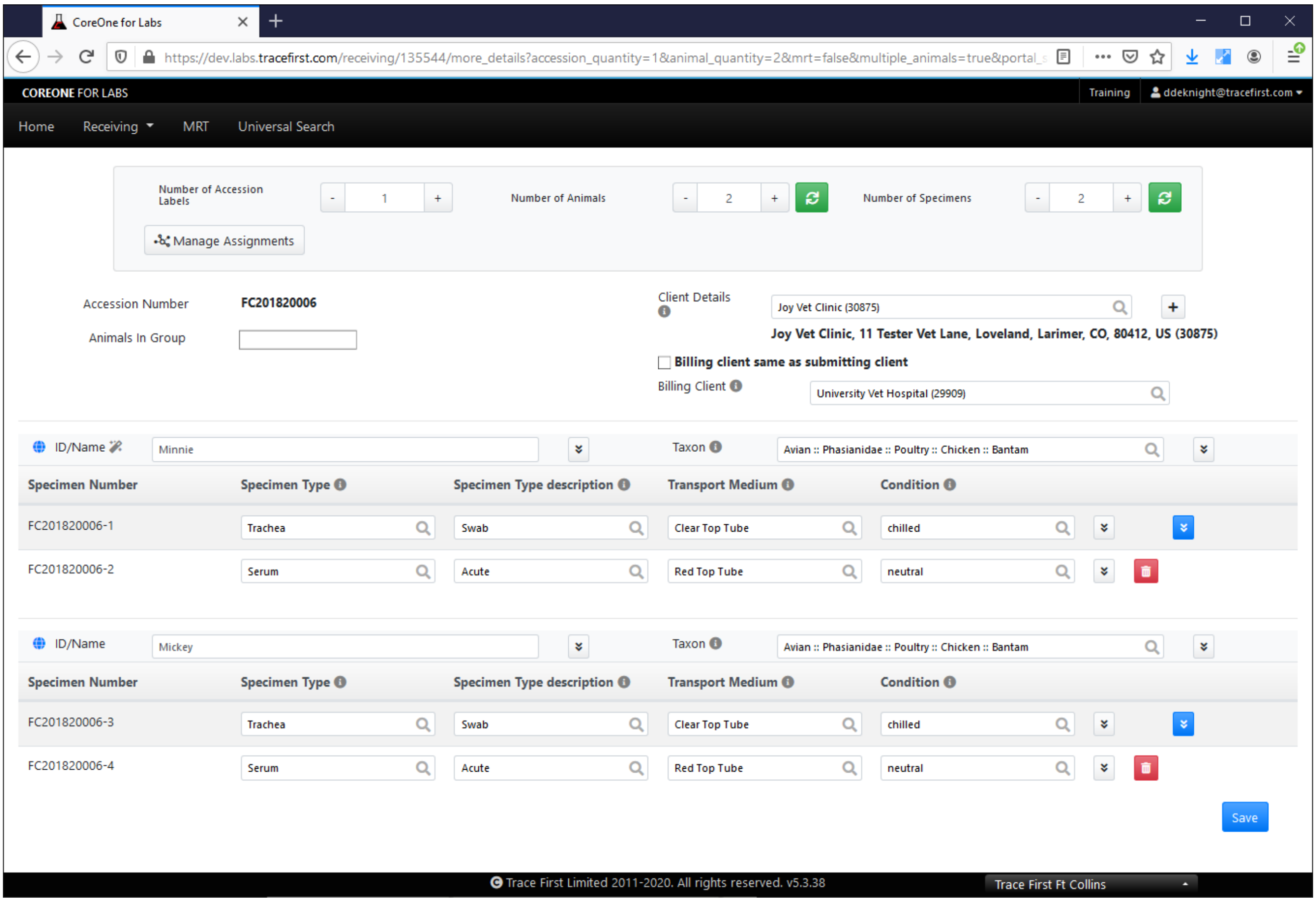
Enter Animal & Specimen Basics

Options at the top of the page allow you to adjust settings entered on the last page.

To add or remove animals or specimens, click the '**+**' or '**-**' icon until the desired number is displayed, then click the green **Refresh** button. The number of animals/specimens displayed will update accordingly.

To review or update the assigned lab section(s), click the grey **Manage Assignments** button.





Select Client

In **Client Details** in the top right, search for and enter the submitting client *(required)*.

Third-Party Billing

CoreOne for Labs allows for third-party billing of accessions.

To bill a third-party for the accession, uncheck the **Billing Client Same as Submitting Client** box to be presented with the separate **Billing Client** field.

Both the submitting client and the billing client will be able to receive reports and view results in the portal, but only the billing client will receive the invoice and be able to view it in the portal.

In these cases, the accession credit status is based on the billing client and the standard Resolution Center rules apply. Once the accession is managed through the Resolution Center, results and reports are made available to both clients.

Enter Animals

If this is a group accession, enter the number of **Animals in Group**, otherwise, leave blank.

Enter the **ID/Name** and **Taxon** for each animal.

Populate Animal Details with GVL

Animal details can be auto-populated with GVL data during receiving.

To search for a GVL record for an animal, click the blue **GVL Search** icon to the left of the animal **ID/Name**.

GVL's attached at receiving can be viewed by going to the accession's **More** menu and selecting **GVL's**.

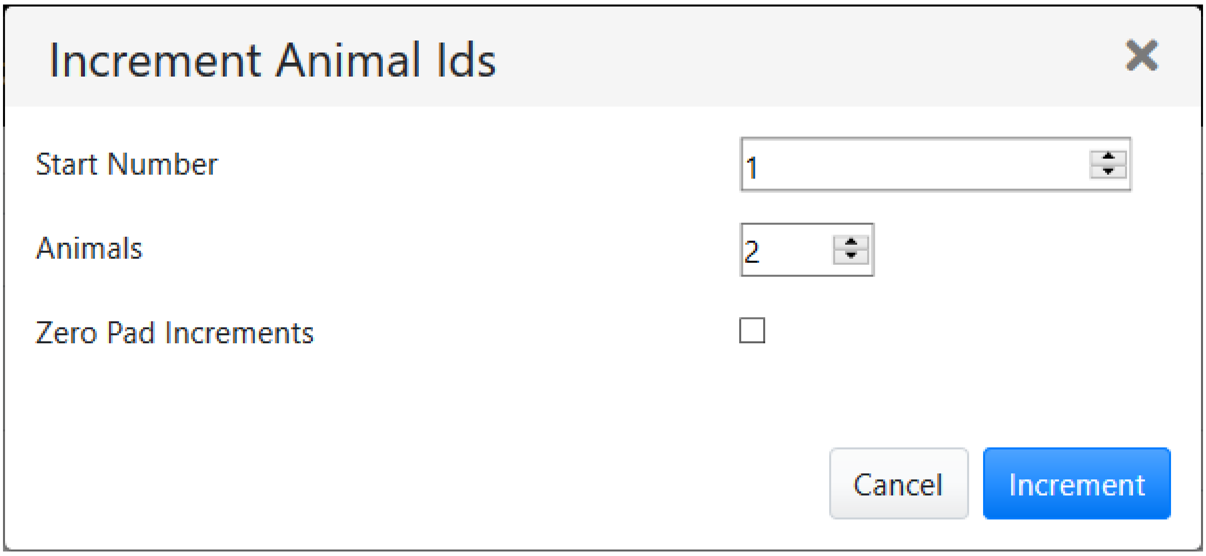
For more details on our GVL integration feature, please visit our **How to Manage GVL Accessions** article.

Auto-Increment Animal ID

The suffix of the Animal ID can be automatically numbered based on the increment options set by the user.

To auto-increment Animal IDs, enter the first part of the Animal ID, then click the grey **Auto-Increment** magic wand icon.

The **Increment Animal ID** overlay will be presented.

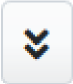


Set the options as desired and click the blue **Increment** button to update the Animal IDs.

Fill Down Animal Data

To auto-populate the **ID/Name** and/or **Taxon** for the remaining animals,

click the grey **Fill Down** arrows icon to the right of the **ID/Name** or **Taxon**.



Enter Specimens

The **Specimen Number** that has been generated will display to the left of each specimen.

Enter the **Specimen Type**, **Specimen Type Description**, **Transportation Medium**, and **Condition** for each specimen.

Fill Down Specimen Data (One Animal)

To auto-populate the details for the remaining specimens of one animal, click the grey **Fill Down** arrows icon to the right of the **Condition**.

Note: This feature only auto-populates specimen data for one animal and will ***not*** auto-populate the specimen data for any other animals listed.

Fill Down Specimen Data (All Animals)

To auto-populate the details for the remaining specimens of all animals, click the blue **Fill Down** arrows icon on the right.

Delete Specimens

Users can delete additional specimen rows using the red **Trash Can** delete icon.

Deleting a specimen instantly removes the specimen from the accession.

Once all data is entered, click the blue **Save** button to save the move the **Accession Review**.

Review Accession

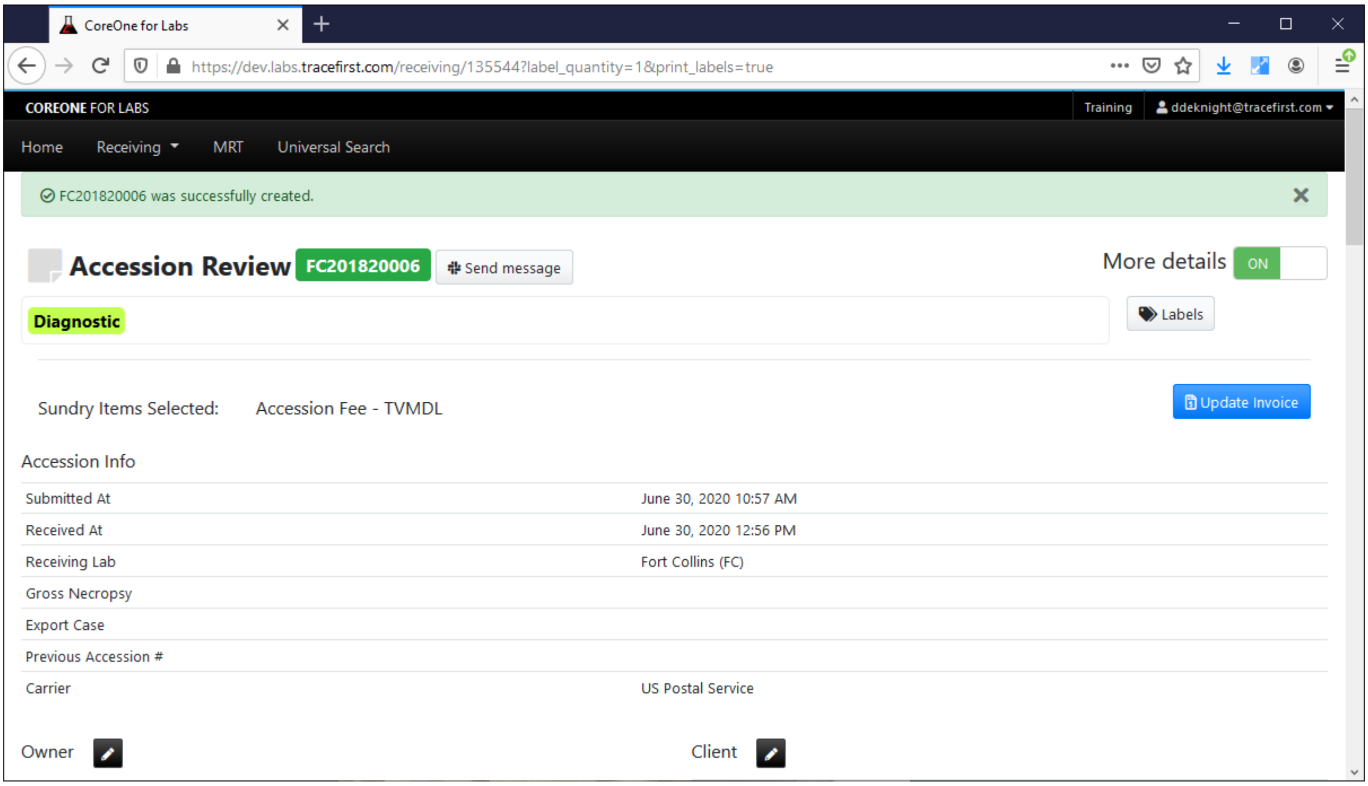
The barcode labels will be printed upon display of the **Accession Review** screen.

Review Accession Details

The last step prompts the user to review a summary of the accession details entered.

The **More Details** toggle is **ON** by default. This makes it easy for the user to view the specimen numbers while affixing barcode labels to the appropriate specimen containers.

Options are provided to add **Sticky Notes**, send **Slack Messages** (when integrated), apply **Labels** to the accession, as well as update the invoice. *(For more details, see the **Additional Features** section of this article).*



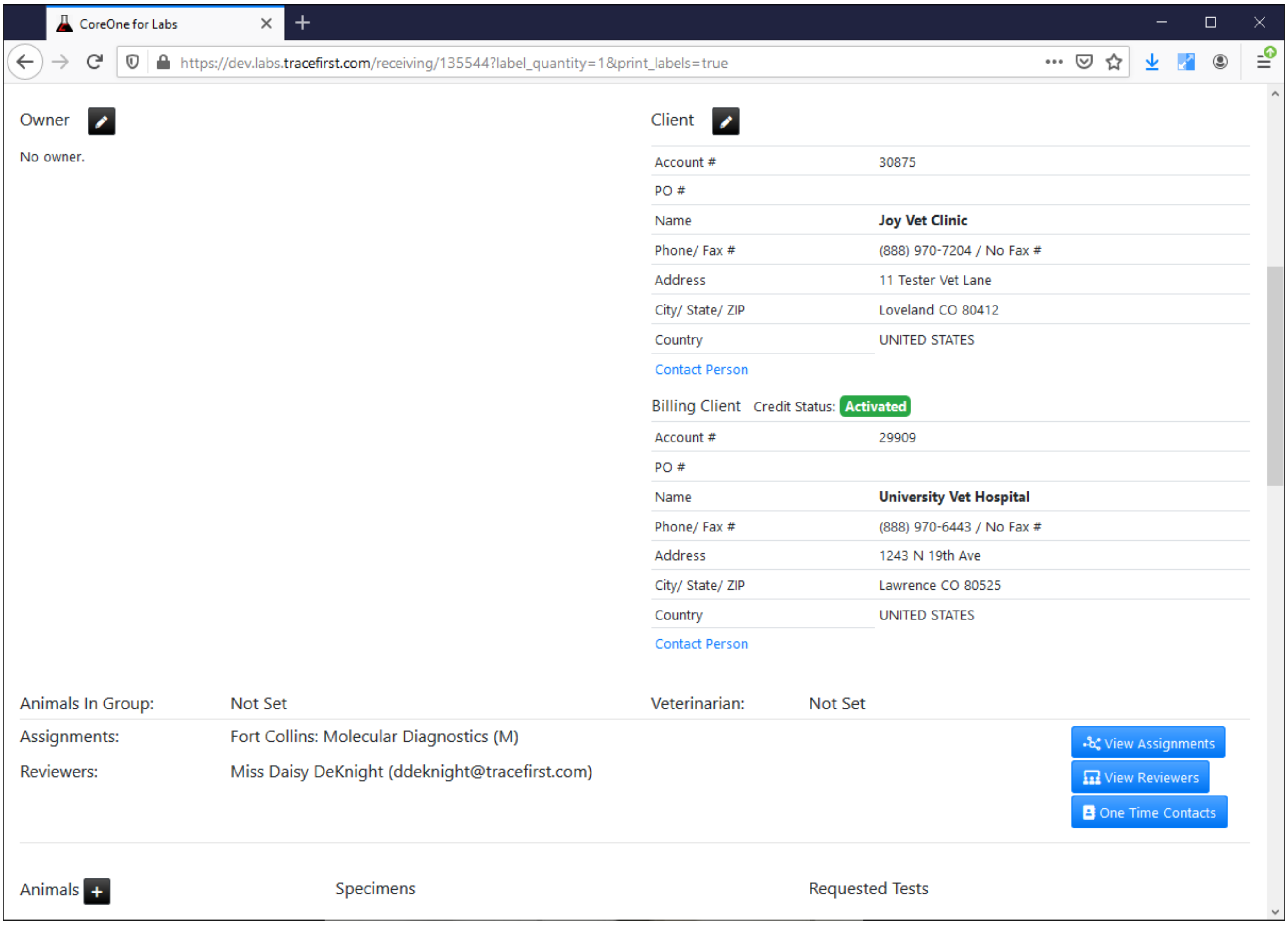
Review Owner & Client Details

Owner details are displayed on the left.

Client details are displayed on the right.

A blue link is provided to quickly view the **Contact Person** for the client.

In cases where a third-party billing client has been added, the billing client details will be displayed underneath the submitting client details.



The name of the **Veterinarian** (when entered) is listed below the **Client** details on the right.

To change the **Owner** or **Client**, click the grey **Edit** pencil icon.

Add One-Time Contacts

One-Time Contacts can be added to the accession.

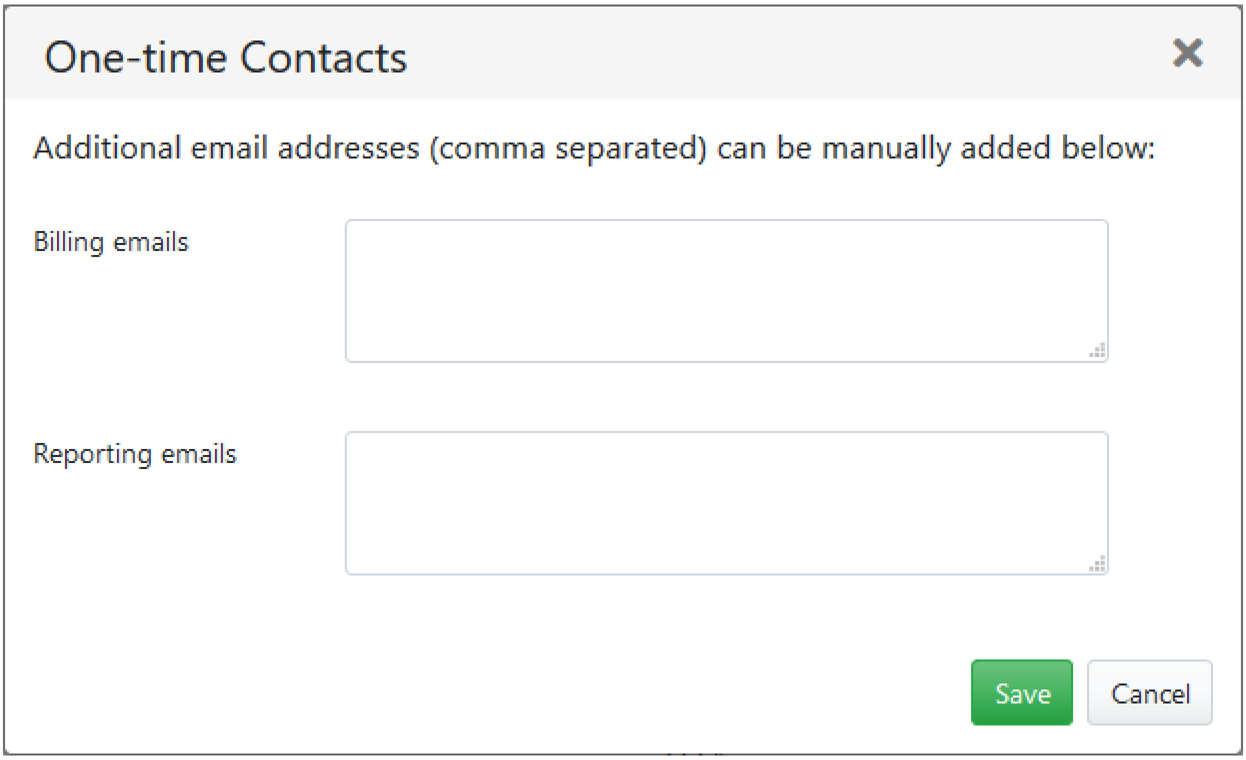
These contacts can be existing clients, or can be contacts external to *CoreOne for Labs*.

Once added, these contact email addresses will appear on report email prompts, auto-checked along with all the client contact email addresses.

These contacts are not added to a client's contact list.

To add **One-Time Contacts**, click the blue **One Time Contacts** button on the right, under the blue buttons to **View Assignments** and **View Reviewers**.

The **One-Time Contacts** overlay window will be presented.



Enter the email addresses, separated by a comma, and then click the green save button.

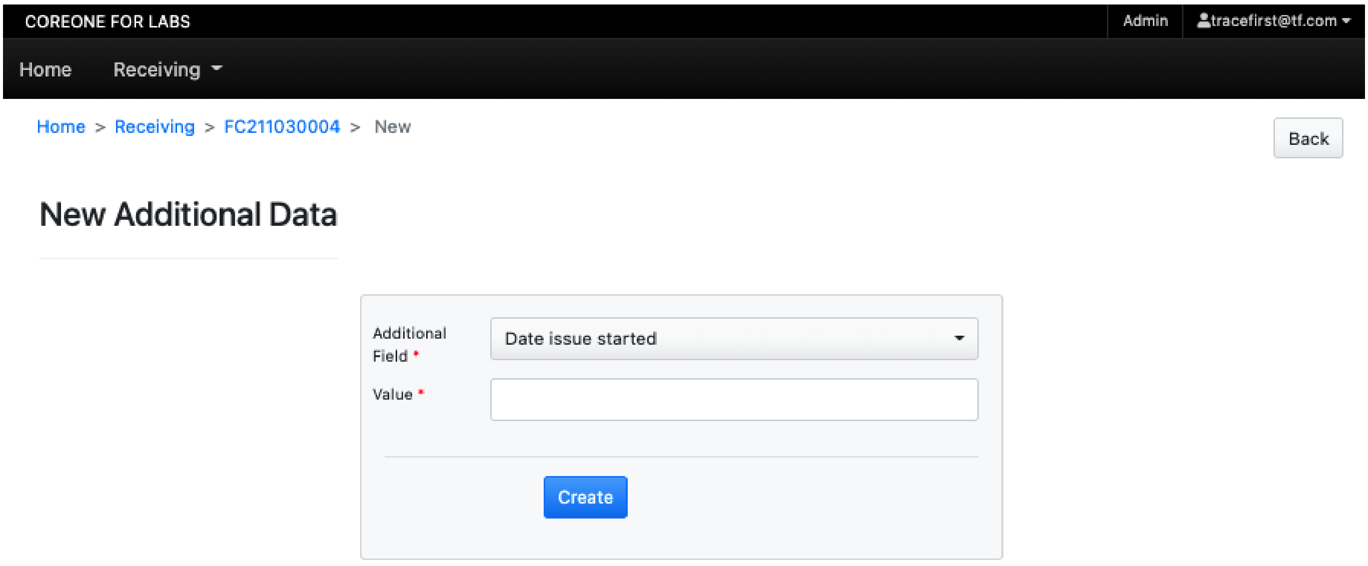
You can add one-time contacts from the more menu at any point in the accession life cycle.

Add Additional Data

To add data to an additional data field to the accession use the **+** button located above the Animal Section.

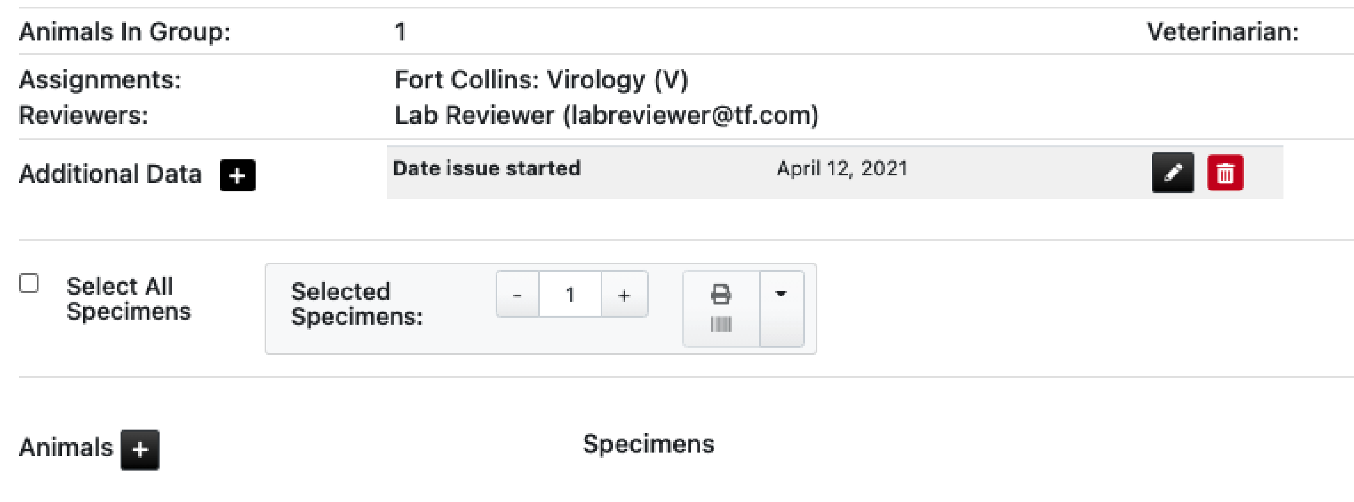
This will direct you to the **New Additional Data Page** where data fields with the **Accession Class** are available for selection.

Once a field is selected and a value is entered use the **Create** button to save the new field and values or use the **Back** button in the upper right corner to navigate back to your previous page.



Edit and Delete Additional Data

When an **Additional Data Field** is already present you can use the **Edit Pencil** to update the field data or use the **Trash Can** to delete the field. These buttons are located to the right of each field added to the accession.



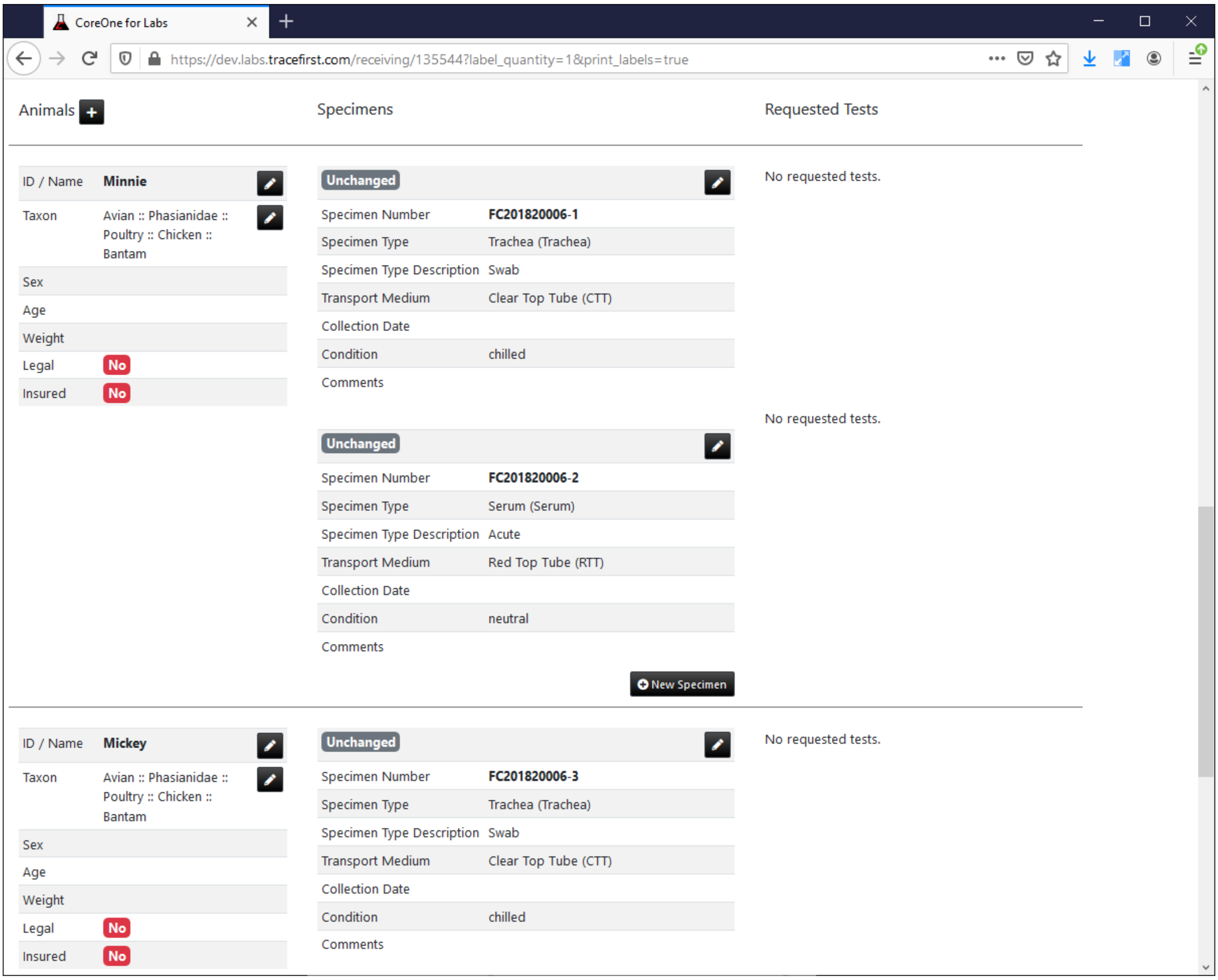
Review Animal & Specimen Details

Assignments and **Reviewers** are displayed on the left, with options to change them provided by the blue buttons on the right.

Animals are displayed on the left.

Specimens are listed to the right.

If any tests have been ordered, they will be displayed to the right of the specimen for which it was ordered.



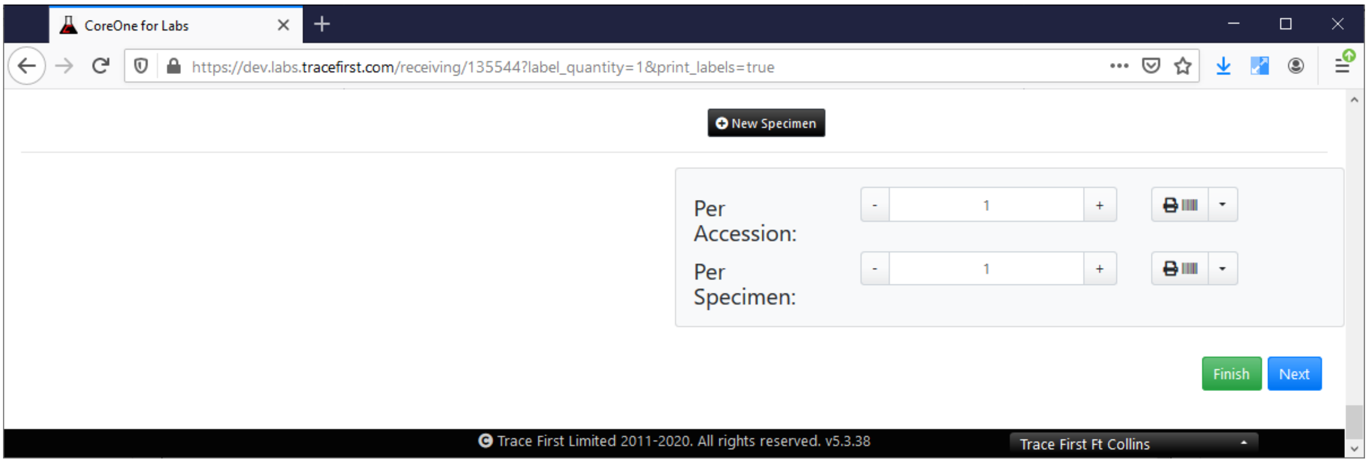
To add animals, click the grey **Add** icon.

To add specimens to an animal, click the grey **Add Specimen** button

To make changes to the animal or specimens, click the grey **Edit** pencil icon.

Print Additional Barcode Labels

If any additional barcode labels are needed, print them from the bottom of the **Accession Review** page.



Once the accession has been reviewed for accuracy, specimen labels have been applied, and any relevant notes/labels have been added, click the blue **Next** button to instantly move to the next accession in the priority list.

Alternatively, click the green **Finish** button to return to the **Receiving** index.

The accession has now been created and will be listed on the **Received Today** tab.

Affix accession barcode labels to any documentation that came with the package that needs to be included with the accession. Scan the documents with the accession barcode labels to automatch the scanned files to the accession record.

For more details on managing accessions, please visit our **How to Manage Accessions** article.

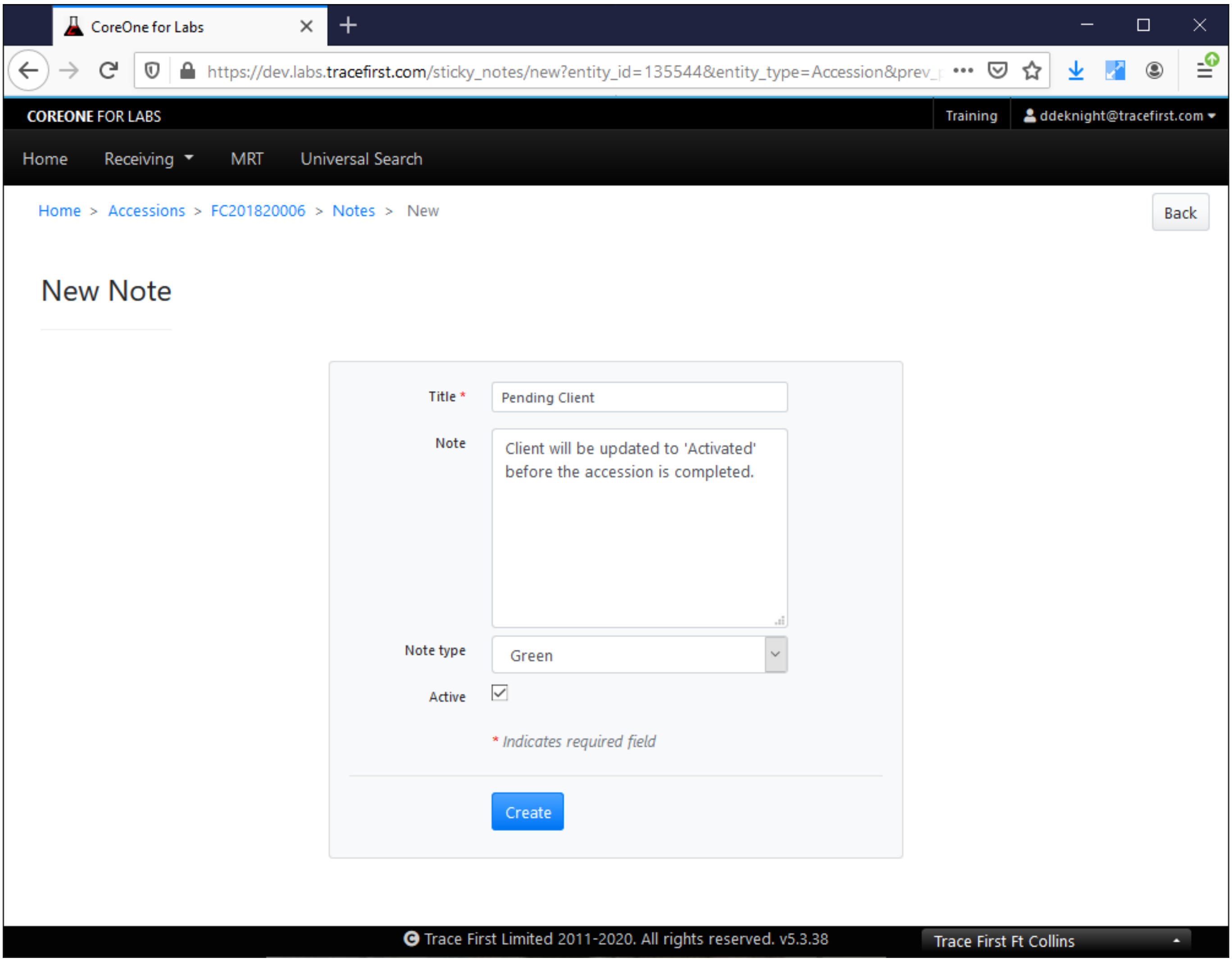
Additional Features

Sticky Notes

 The **Sticky Notes** icon to the left of the accession number remains grey until a note is added.

To add a note, click the **Sticky Notes** icon and then click the blue **New Note** button.

Enter the required note **Title** and if desired, enter details in the **Note** field.



Select a **Note Type** color from the drop down menu. Notes are set to yellow by default, and can be updated to green, blue, or red.

Click the blue **Create** button to return to the Notes view for the accession, where the note(s) will be displayed.

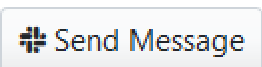
Click the grey **Back** button to return to the accession details review.

Notice that when a note is attached, the icon will become yellow and have the number of notes displayed in parenthesis.

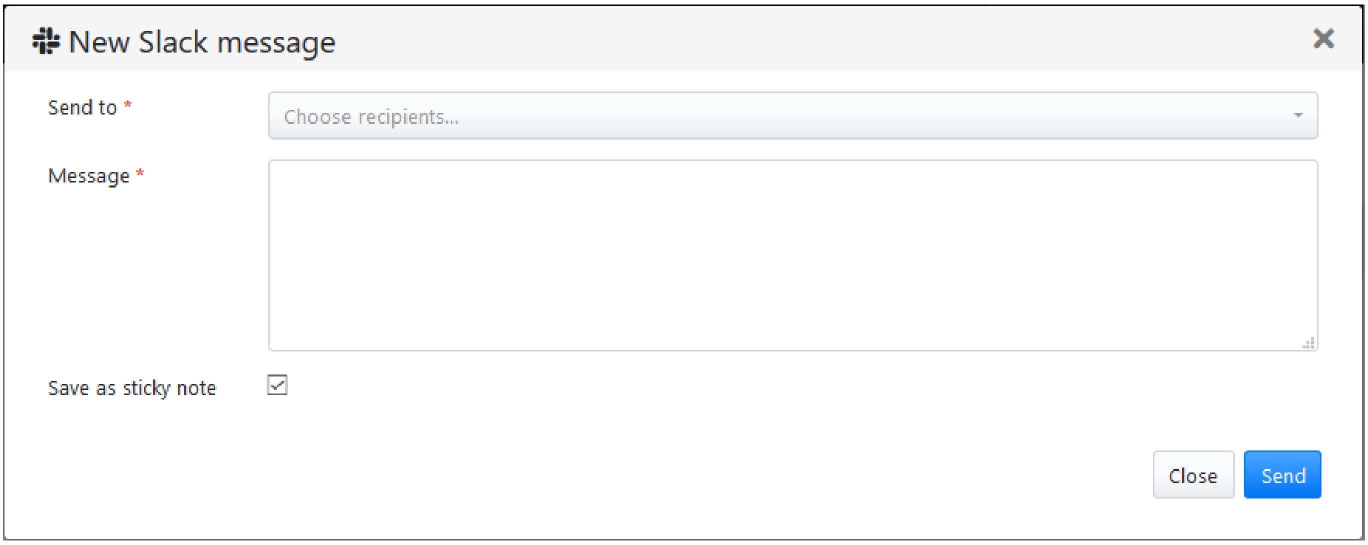
Send Chat Messages

CoreOne for Labs integrates with *Slack* and *Teams* to allow users to save messages to an accession without saving it in the record itself.

To send a message to another user, click the grey **#Send Message** button.



Select the user to which the message will be sent and enter the message.



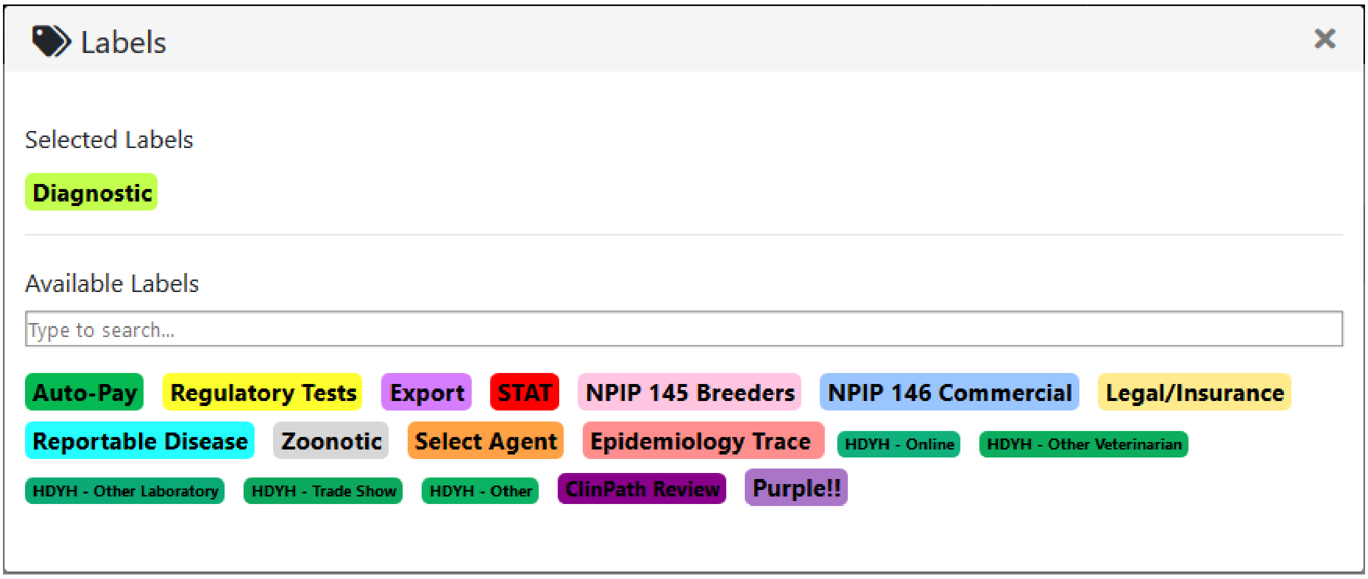
Click the blue **Send** button to send the message.

Click the grey **Close** button to return to the accession details review.

Apply Labels

To apply labels, click the grey **Labels** button.

The labels window will appear.



Click on the label(s) to be added.

If needed, use the search bar to locate labels.

When finished, click the grey **X** icon in the top right corner of the Labels window to return to the accession details.

The label(s) will appear under the accession number at the top of the page.