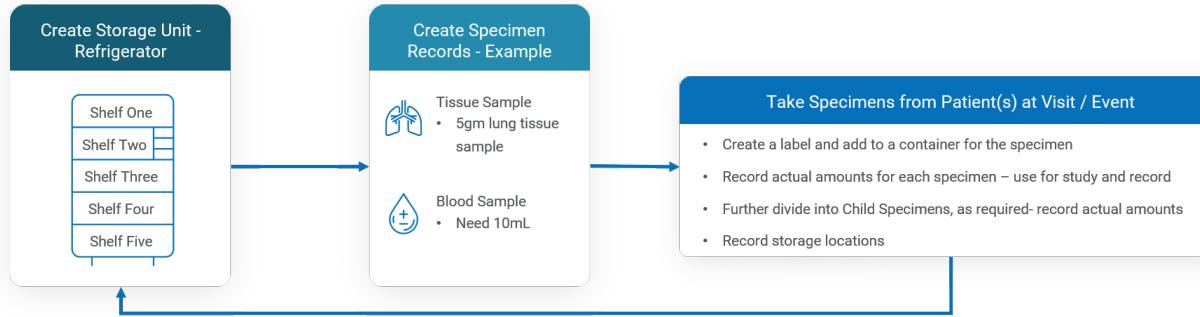


eSample Workflows



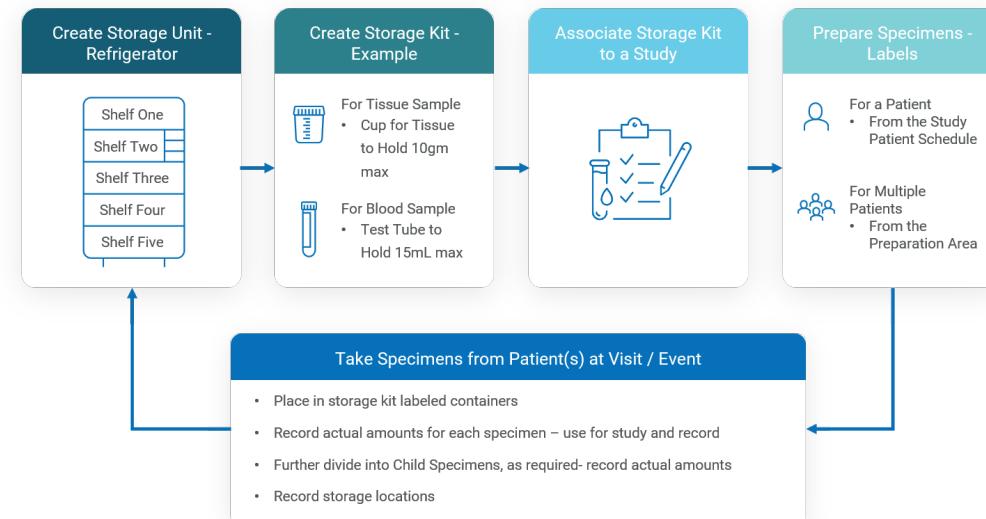
Manual Specimen Collection

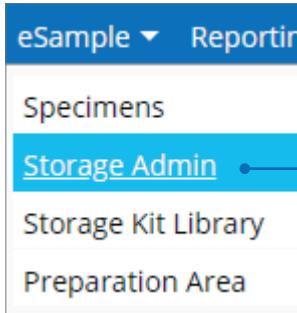
Specimens which are entered at the time of collection which may be collected for a study or anonymously for a biobank or a biorepository.

Automated Specimen

Involves using planned study specimen preparation and collection using storage kits.

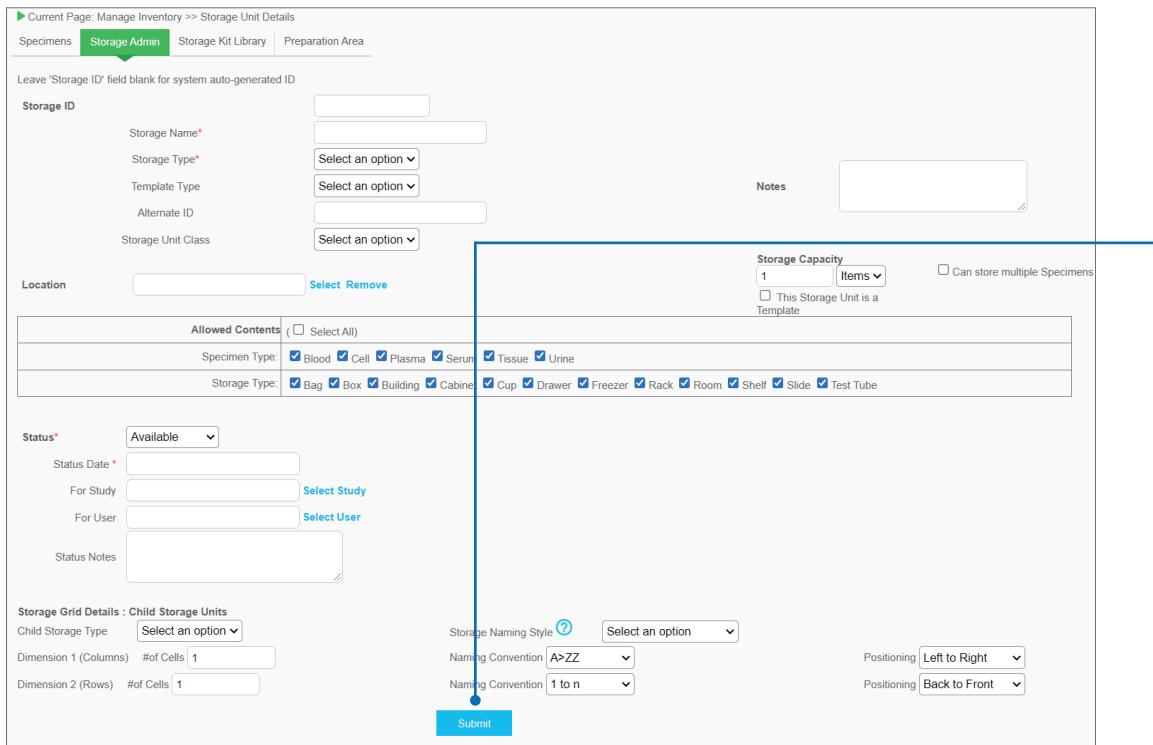
Note: Please refer to the user guide for more details. Workflows will vary depending on procedural needs.





Create a Storage Unit

Storage units in eSample are virtual representations of actual storage units, such as freezers, refrigerators, etc. A storage unit can be associated to a specimen to track a specimen's physical location. From the **eSample** dropdown, select **Storage Admin**.



Current Page: Manage Inventory >> Storage Unit Details

Specimens **Storage Admin** Storage Kit Library Preparation Area

Leave 'Storage ID' field blank for system auto-generated ID

Storage ID

Storage Name*

Storage Type* Select an option

Template Type Select an option

Alternate ID

Storage Unit Class Select an option

Location Select Remove

Allowed Contents (Select All)

Specimen Type:	<input checked="" type="checkbox"/> Blood	<input checked="" type="checkbox"/> Cell	<input checked="" type="checkbox"/> Plasma	<input checked="" type="checkbox"/> Serum	<input checked="" type="checkbox"/> Tissue	<input checked="" type="checkbox"/> Urine						
Storage Type:	<input checked="" type="checkbox"/> Bag	<input checked="" type="checkbox"/> Box	<input checked="" type="checkbox"/> Building	<input checked="" type="checkbox"/> Cabinet	<input checked="" type="checkbox"/> Cup	<input checked="" type="checkbox"/> Drawer	<input checked="" type="checkbox"/> Freezer	<input checked="" type="checkbox"/> Rack	<input checked="" type="checkbox"/> Room	<input checked="" type="checkbox"/> Shelf	<input checked="" type="checkbox"/> Slide	<input checked="" type="checkbox"/> Test Tube

Status* Available

Status Date *

For Study Select Study

For User Select User

Status Notes

Storage Grid Details : Child Storage Units

Child Storage Type Select an option

Dimension 1 (Columns) # of Cells 1

Dimension 2 (Rows) # of Cells 1

Storage Naming Style Select an option

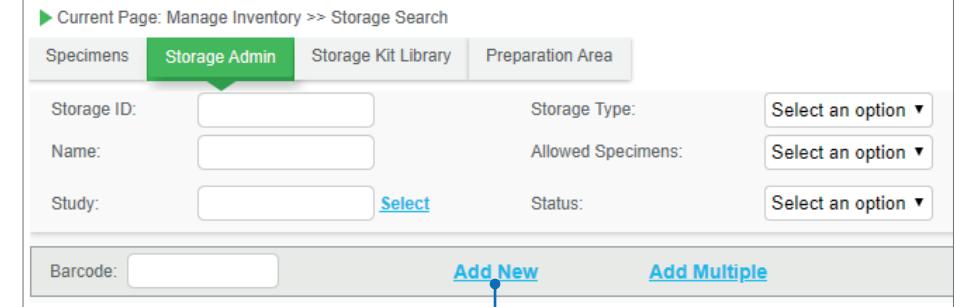
Naming Convention A>ZZ

Naming Convention 1 to n

Positioning Left to Right

Positioning Back to Front

Submit



Current Page: Manage Inventory >> Storage Search

Specimens **Storage Admin** Storage Kit Library Preparation Area

Storage ID:

Storage Type: Select an option

Name:

Allowed Specimens: Select an option

Study: Select

Status: Select an option

Barcode:

Add New **Add Multiple**

Click **Add New**.

On the Storage Unit Details page, define the fields as appropriate. Fields marked with a red asterisk are required fields. After defining the storage unit, click **Submit** to save the unit.

Note: Children storage locations, such as shelves, boxes, etc., should not be edited once specimens start to be allocated to them. Refer to the user guide for details on defining child storage unit grids.

Storage Admin Functionalities

Edit a Storage Unit

Click the storage **ID** to edit an existing storage unit.

Current Page: Manage Inventory >> Storage Search

Specimens	Storage Admin	Storage Kit Library	Preparation Area			
Storage ID:	<input type="text"/>	Storage Type:	<input type="button" value="Select an option ▾"/>			
Name:	<input type="text"/>	Allowed Specimens:	<input type="button" value="Select an option ▾"/>			
Study:	<input type="text"/> Select	Status:	<input type="button" value="Select an option ▾"/>			
<input type="text"/> Barcode:		<input type="button" value="Add New"/> Add Multiple Update Status Print Label Delete Copy Storage Unit/Template	<input type="checkbox"/> Show in Grid View <input type="checkbox"/> Show Templates Only <input type="button" value="Search"/>			
ID	Name	Type	Location	Capacity	Status	Select
386	AMcbnt	Cabinet	<input type="text"/>	1 Items	Available	<input type="checkbox"/>
385	AMfrzr	Freezer	<input type="text"/>	1 Items	Available	<input type="checkbox"/>
396	No.453Cabnt	Cabinet	<input type="text"/>	1 Items	Available	<input type="checkbox"/>

Add Multiple Storage Units

Click **Add Multiple** to add multiple storage units at once.

Update Status

Using the checkboxes in the Select column on the right, select one or more storage units and click **Update Status** to update.

Search Storage Units

To see existing storage units, use the Search fields at the top of the page. To see the view below, uncheck Show in Grid View, then click **Search**.

Add Multiple Storage Units

Click **Add Multiple** to add multiple storage units at once.

Update Status

Using the checkboxes in the Select column on the right, select one or more storage units and click **Update Status** to update.

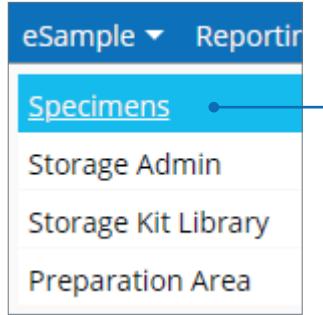
Print Label

Using the checkboxes in the Select column on the right, select one or more storage units and click **Print Label**.

Delete

After completing a successful search, click the appropriate checkbox in the Select column and click **Delete**.

Specimen Inventory - Create Specimen



eSample ▾ Reporting

- Specimens** •
- Storage Admin
- Storage Kit Library
- Preparation Area

Create a Specimen

Within eSample, the Specimen Inventory allows users to manage specimens. From the **eSample** dropdown, select **Specimens**.

▶ Current Page: Manage Inventory >> Specimens

Specimens	Storage Admin	Storage Kit Library	Preparation Area
Patient ID: <input type="text"/>	Type: <input type="text"/>		
Specimen ID: <input type="text"/>	Study: <input type="text"/>		
Location: <input type="text"/>	Owner: <input type="text"/>		
Patient Study ID: <input type="text"/>	Status Date: <input type="text"/>		
Current Amount: <input type="text"/>	Processed Status: <input type="text"/>		
<input type="checkbox"/> Specimen not linked with Study			
Barcode: <input type="text"/>	Scan Multiple	Bulk Upload Area	Add New

▶ Current Page: Manage Inventory >> Specimen Details

Specimens	Storage Admin	Storage Kit Library	Preparation Area																												
<p>Details</p> <p>Leave 'Specimen ID' field blank for system auto-generated ID</p> <table> <tr> <td>Specimen ID: <input type="text"/></td> <td>Associations</td> </tr> <tr> <td>Alternate ID: <input type="text"/></td> <td>Study: <input type="text"/> <input type="button" value="Select"/></td> </tr> <tr> <td>Description: <input type="text"/></td> <td>Patient ID: <input type="text"/> <input type="button" value="Select"/></td> </tr> <tr> <td>Type* <input type="button" value="Select an option"/></td> <td>Organization: <input type="text"/> <input type="button" value="Select"/></td> </tr> <tr> <td>Collection Date and Time: <input type="text"/> 00 : 00 : 00 <input type="button" value="Current Time"/> <input type="button" value="Reset"/></td> <td>Visit/Event: <input type="text"/></td> </tr> <tr> <td>Age at Time of Collection: 00 Years 00 Months 00 Days</td> <td>Patient Study ID: <input type="text"/></td> </tr> <tr> <td>Owner: Adam Yerger <input type="button" value="Select"/></td> <td></td> </tr> <tr> <td>Location: <input type="text"/> <input type="button" value="Select Remove"/></td> <td></td> </tr> <tr> <td>Anatomic Site: <input type="text"/> <input type="button" value="Select an option"/></td> <td>Notes: <input type="text"/></td> </tr> <tr> <td>Tissue Side: <input type="text"/> <input type="button" value="Select an option"/></td> <td></td> </tr> <tr> <td>Pathological Status: <input type="text"/> <input type="button" value="Select an option"/></td> <td></td> </tr> <tr> <td>Pathologist: <input type="text"/></td> <td>Surgeon: <input type="text"/></td> </tr> <tr> <td>Collecting Technician: <input type="text"/></td> <td>Processing Technician: <input type="text"/></td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Copy the Parent Specimen Details  <input checked="" type="checkbox"/> </td> </tr> </table>				Specimen ID: <input type="text"/>	Associations	Alternate ID: <input type="text"/>	Study: <input type="text"/> <input type="button" value="Select"/>	Description: <input type="text"/>	Patient ID: <input type="text"/> <input type="button" value="Select"/>	Type* <input type="button" value="Select an option"/>	Organization: <input type="text"/> <input type="button" value="Select"/>	Collection Date and Time: <input type="text"/> 00 : 00 : 00 <input type="button" value="Current Time"/> <input type="button" value="Reset"/>	Visit/Event: <input type="text"/>	Age at Time of Collection: 00 Years 00 Months 00 Days	Patient Study ID: <input type="text"/>	Owner: Adam Yerger <input type="button" value="Select"/>		Location: <input type="text"/> <input type="button" value="Select Remove"/>		Anatomic Site: <input type="text"/> <input type="button" value="Select an option"/>	Notes: <input type="text"/>	Tissue Side: <input type="text"/> <input type="button" value="Select an option"/>		Pathological Status: <input type="text"/> <input type="button" value="Select an option"/>		Pathologist: <input type="text"/>	Surgeon: <input type="text"/>	Collecting Technician: <input type="text"/>	Processing Technician: <input type="text"/>	<input type="checkbox"/> Copy the Parent Specimen Details  <input checked="" type="checkbox"/>	
Specimen ID: <input type="text"/>	Associations																														
Alternate ID: <input type="text"/>	Study: <input type="text"/> <input type="button" value="Select"/>																														
Description: <input type="text"/>	Patient ID: <input type="text"/> <input type="button" value="Select"/>																														
Type* <input type="button" value="Select an option"/>	Organization: <input type="text"/> <input type="button" value="Select"/>																														
Collection Date and Time: <input type="text"/> 00 : 00 : 00 <input type="button" value="Current Time"/> <input type="button" value="Reset"/>	Visit/Event: <input type="text"/>																														
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Location: <input type="text"/> <input type="button" value="Select Remove"/>																															
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Collecting Technician: <input type="text"/>	Processing Technician: <input type="text"/>																														
<input type="checkbox"/> Copy the Parent Specimen Details  <input checked="" type="checkbox"/>																															

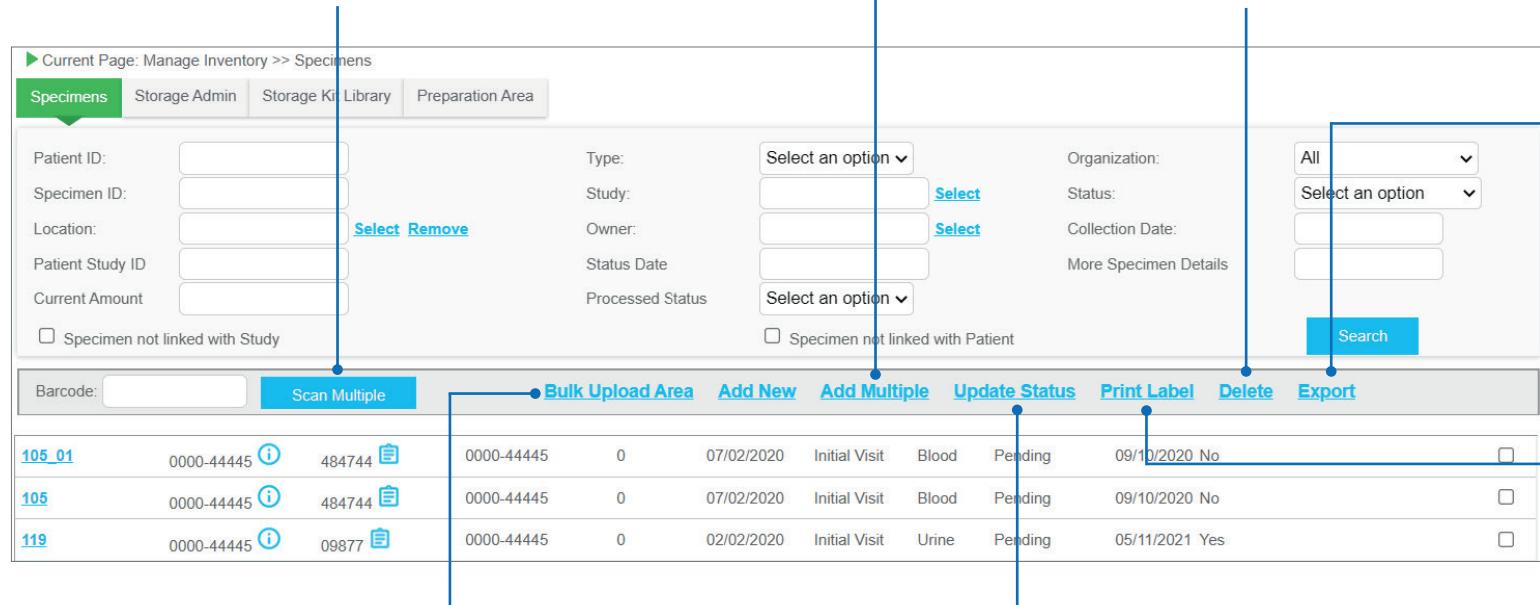
Click **Add New**.

On the Specimen Details page, define fields as appropriate and **Submit** with your e-Signature.

Specimen Inventory Management

Scan Multiple

Click **Scan Multiple** to open barcode scanning or manual entry options to update multiple specimen statuses, delete multiple specimens, print multiple labels, or export specimens.



Current Page: Manage Inventory >> Specimens

Specimens Storage Admin Storage Kit Library Preparation Area

Patient ID: Type: Organization:
 Specimen ID: Study: Status:
 Location: Owner: Collection Date:
 Patient Study ID: Status Date: More Specimen Details:
 Current Amount:
 Specimen not linked with Study

Barcode: Scan Multiple

Bulk Upload Area **Add New** **Add Multiple** **Update Status** **Print Label** **Delete** **Export**

Specimen ID	Type	Study	Owner	Status Date	Collection Date	More Specimen Details	Select
105_01	0000-44445	Initial Visit	Blood	Pending	09/10/2020	No	<input type="checkbox"/>
105	0000-44445	Initial Visit	Blood	Pending	09/10/2020	No	<input type="checkbox"/>
119	0000-44445	Initial Visit	Urine	Pending	05/11/2021	Yes	<input type="checkbox"/>

Bulk Upload Area

Click **Bulk Upload Area** to upload multiple specimens by using a template. Refer to the user guide for more details.

Add Multiple

Click **Add Multiple** to add multiple specimens in the pop-up window.

Delete

After completing a successful search, click the appropriate checkbox in the Select column and click **Delete**.

Export

Click **Export** to export a CSV spreadsheet of all specimens shown after searching.

Print Label

Using the checkboxes in the Select column on the right, select one or more specimens and click **Print Label** and click **Go** in the pop-up.

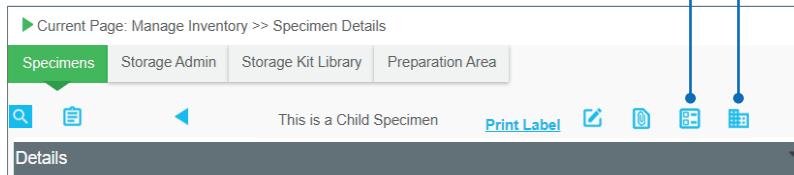
Update Status

Using the checkboxes in the Select column on the right, select one or more specimens and click **Update Status** to update.



Forms

After clicking a specimen ID, click Forms to access adding and viewing forms for a specimen.



Labs

After clicking a specimen ID, click Labs to access adding and viewing lab results for a specimen.

Create New Child Specimens

Use these fields to add new child specimens.

# of Child Specimens	Quantity	Process
<input type="button" value="Select an option"/>		
<input type="button" value="Existing Child Specimens"/>		
<input type="button" value="Process"/>		
<input type="button" value="Select an option"/>		
<input type="radio" value="Apply to All Child Specimens"/> Apply to All Child Specimens		
<input type="radio" value="Apply to Selected Child Specimens"/> Apply to Selected Child Specimens		

Existing Child Specimens

Use these fields to update process-specific data for all or selected existing child specimens.

Power Bar

Update fields simultaneously for all selected child specimens.

<input checked="" type="checkbox"/> Delete		Specimen ID	Collection Date	Type	Status	Status Date	Collected Amount	Current Amount	Process	Location	<input type="button" value="Set Location"/>	<input type="button" value="Clear Location"/>
<input checked="" type="checkbox"/> 2 Selected		<input type="button" value="Select an option"/>	<input type="button" value="Select an option"/>									
<input checked="" type="checkbox"/>		152_01	10/11/2021	Urine	Processed	10/25/2021	22.5 Millilitre	22.5 Millilitre	<input type="button" value="Select an option"/>			
<input checked="" type="checkbox"/>		152_02	10/11/2021	Urine	Processed	10/25/2021	22.5 Millilitre	22.5 Millilitre	<input type="button" value="Select an option"/>			
<input type="button" value="e-Signature *"/>												
<input type="button" value="Submit"/>												

Delete

Click to delete a specific child specimen.

e-Signature/Submit

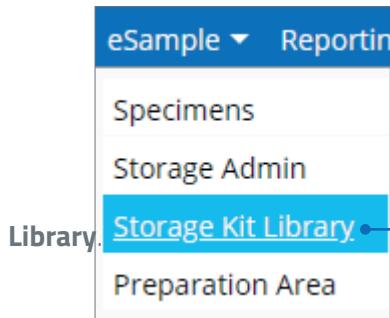
Enter e-Signature and click **Submit** to confirm any and all changes made to new or existing child specimens.

Print Label

Print labels for selected child specimens.

Set/Clear Location

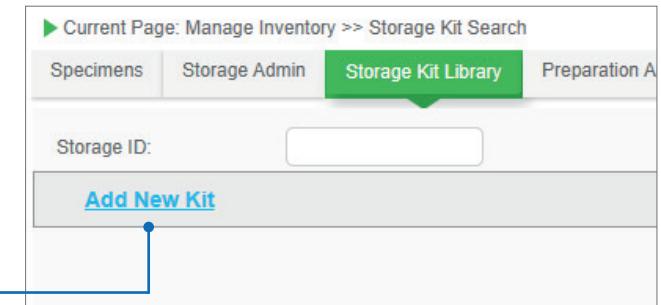
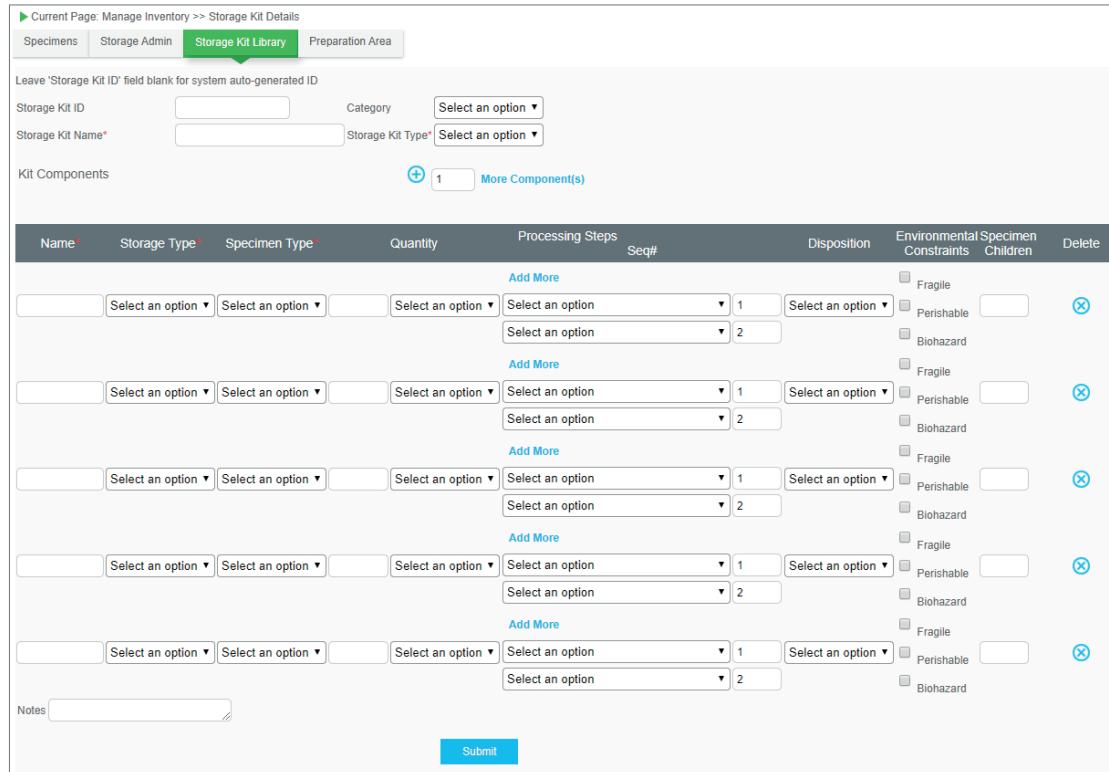
Use these buttons to add or clear storage unit locations for selected child specimens simultaneously.



Create Storage Kit

Within eSample, a storage kit is a set of components (i.e. test tube, urine cup, etc.) that is a virtual representation used to collect samples (specimens) during a study patient's visit. From the **eSample** dropdown, select **Storage Kit**

Click **Add New Kit**.

Current Page: Manage Inventory >> Storage Kit Details

Leave 'Storage Kit ID' field blank for system auto-generated ID

Storage Kit ID	Category	Select an option																																																																																																				
Storage Kit Name*	Storage Kit Type*	Select an option																																																																																																				
<input style="width: 20px; height: 20px; margin-right: 10px;" type="button" value="+"/> 1 More Component(s)																																																																																																						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name*</th> <th>Storage Type*</th> <th>Specimen Type*</th> <th>Quantity</th> <th>Processing Steps</th> <th>Seq#</th> <th>Disposition</th> <th>Environmental Constraints</th> <th>Specimen Children</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>1</td> <td><input type="text"/></td> <td><input type="checkbox"/> Fragile</td> <td><input type="checkbox"/> Perishable</td> <td><input type="button" value="X"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="text"/></td> <td>2</td> <td><input type="text"/></td> <td><input type="checkbox"/> Biohazard</td> <td><input type="checkbox"/> Fragile</td> <td><input type="button" value="X"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="text"/></td> <td>1</td> <td><input type="text"/></td> <td><input type="checkbox"/> Perishable</td> <td><input type="checkbox"/> Biohazard</td> <td><input type="button" value="X"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="text"/></td> <td>2</td> <td><input type="text"/></td> <td><input type="checkbox"/> Fragile</td> <td><input type="checkbox"/> Biohazard</td> <td><input type="button" value="X"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="text"/></td> <td>1</td> <td><input type="text"/></td> <td><input type="checkbox"/> Perishable</td> <td><input type="checkbox"/> Fragile</td> <td><input type="button" value="X"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="text"/></td> <td>2</td> <td><input type="text"/></td> <td><input type="checkbox"/> Biohazard</td> <td><input type="checkbox"/> Perishable</td> <td><input type="button" value="X"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="text"/></td> <td>1</td> <td><input type="text"/></td> <td><input type="checkbox"/> Fragile</td> <td><input type="checkbox"/> Biohazard</td> <td><input type="button" value="X"/></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td><input type="text"/></td> <td>2</td> <td><input type="text"/></td> <td><input type="checkbox"/> Perishable</td> <td><input type="checkbox"/> Fragile</td> <td><input type="button" value="X"/></td> </tr> <tr> <td colspan="10"> <input type="text"/> Notes <input type="button" value="Submit"/> </td> </tr> </tbody> </table>			Name*	Storage Type*	Specimen Type*	Quantity	Processing Steps	Seq#	Disposition	Environmental Constraints	Specimen Children	Delete	<input type="text"/>	1	<input type="text"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/> Perishable	<input type="button" value="X"/>					<input type="text"/>	2	<input type="text"/>	<input type="checkbox"/> Biohazard	<input type="checkbox"/> Fragile	<input type="button" value="X"/>					<input type="text"/>	1	<input type="text"/>	<input type="checkbox"/> Perishable	<input type="checkbox"/> Biohazard	<input type="button" value="X"/>					<input type="text"/>	2	<input type="text"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/> Biohazard	<input type="button" value="X"/>					<input type="text"/>	1	<input type="text"/>	<input type="checkbox"/> Perishable	<input type="checkbox"/> Fragile	<input type="button" value="X"/>					<input type="text"/>	2	<input type="text"/>	<input type="checkbox"/> Biohazard	<input type="checkbox"/> Perishable	<input type="button" value="X"/>					<input type="text"/>	1	<input type="text"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/> Biohazard	<input type="button" value="X"/>					<input type="text"/>	2	<input type="text"/>	<input type="checkbox"/> Perishable	<input type="checkbox"/> Fragile	<input type="button" value="X"/>	<input type="text"/> Notes <input type="button" value="Submit"/>													
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				<input type="text"/>	1	<input type="text"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/> Biohazard	<input type="button" value="X"/>																																																																																													
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<input type="text"/> Notes <input type="button" value="Submit"/>																																																																																																						

On the Storage Kit Details page, define fields as appropriate and **Submit** with your e-Signature.

Associate Storage Kit to Patient Calendar

Associated Calendars
Calendars currently associated with this study are:

Calendar Name
Example Patient Calendar 2021
Structured Patient Visit Calendar - ARM33123
Structured Patient Visit Calendar - Alternate

Access a Study Calendar

1. Click a calendar name in the Study Setup tab for a study.

Event	Initial Visit...
<input type="checkbox"/> Baseline Evaluation	<input type="checkbox"/>

Access Event Details

2. Click edit next to the event name in the Event-Visit Grid and then click the **Resource** tab.

Event Detail	Message	Cost	Appendix	Resource	CRF Details
Event Name :Baseline Evaluation					
Resources linked with this Event:				Select/Edit Role type	Select User
Role Types		Duration	Notes	Select Storage Kit	

Associate Storage Kit

3. Click **Select Storage Kit**.

Storage Kit: [Select Storage Kit](#)

Apply to all Events in this Visit
 Apply to All **Baseline Evaluation** Events in this Calendar

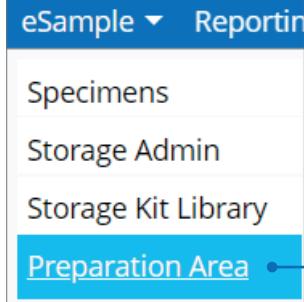
Submit

4. Click **Select Storage Kit** in the pop-up window.

5. Click **Select** next to the storage kit to be associated and click **Submit**

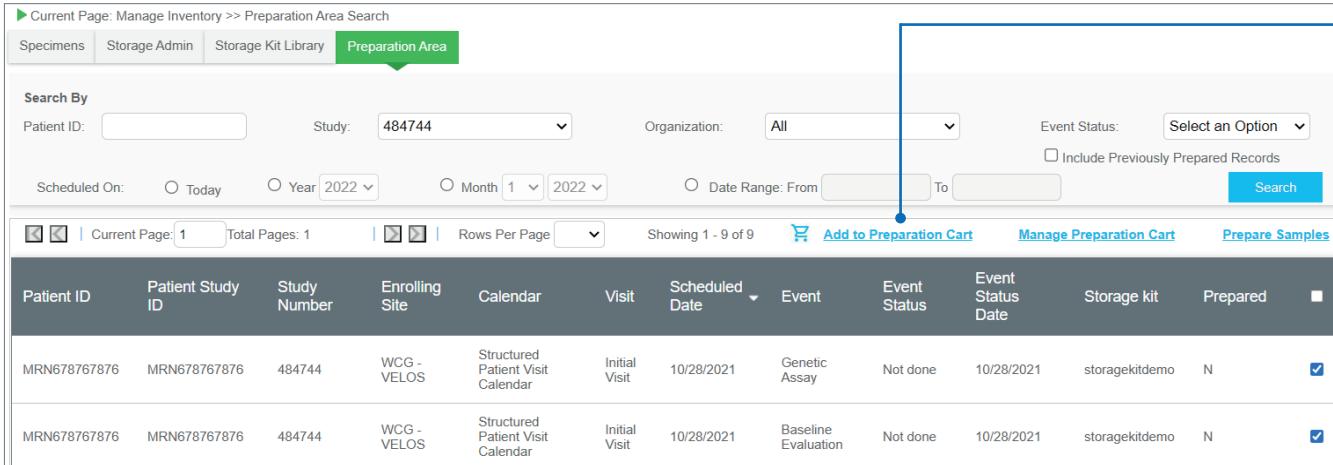
1 to 3 of 3 Record(s) Select All Displayed Remove Selected Record			
	Storage id	Storage name	Parent storage id
Select	1832	ACW-OSA-urinecupsample	-
Select	1838	Purple-Urine cup	-
Select	387	storagekitdemo	-

Preparing Samples - From Preparation Area



Add to Preparation Cart

The Preparation Area is used when samples need to be created to prepare labels for an upcoming collection visit in bulk. From the **eSample** tab, select **Preparation Area**.



Current Page: Manage Inventory >> Preparation Area Search

Specimens Storage Admin Storage Kit Library Preparation Area

Search By

Patient ID: _____ Study: 484744 Organization: All

Scheduled On: Today Year 2022 Month 1 2022 Date Range: From _____ To _____

Event Status: Select an Option Include Previously Prepared Records

Search

Add to Preparation Cart Manage Preparation Cart Prepare Samples

Patient ID	Patient Study ID	Study Number	Enrolling Site	Calendar	Visit	Scheduled Date	Event	Event Status	Event Status Date	Storage kit	Prepared
MRN678767876	MRN678767876	484744	WCG - VELOS	Structured Patient Visit Calendar	Initial Visit	10/28/2021	Genetic Assay	Not done	10/28/2021	storagekitdemo	<input checked="" type="checkbox"/>
MRN678767876	MRN678767876	484744	WCG - VELOS	Structured Patient Visit Calendar	Initial Visit	10/28/2021	Baseline Evaluation	Not done	10/28/2021	storagekitdemo	<input checked="" type="checkbox"/>

1. Check checkboxes in the column to the right to select samples and then click **Add to Preparation Cart**.
2. Click **Prepare Samples**.



Prepare Samples and Print Label(s) e-Signature * Submit

You have selected following item(s) to prepare specimen(s). By default labels will be printed for all prepared specimen(s). Please use 'Print Label(s)' check box to like to print label(s) selectively.

Patient ID	Study Number	Calendar	Visit	Scheduled Date	Event	Storage Kit	Patient Study ID	Event Status	Enrolling Site
MRN678767876484744	Structured Patient Visit Calendar	Initial Visit	10/28/2021	Genetic Assay	storagekitdemo	MRN678767876	Not done	WCG - VELOS	

3. Enter e-Signature and click **Submit**.

Preparing Samples - From Patient Schedule

Prepare Samples

Preparing samples from a patient schedule is ideal for use when labels do not need to be created prior to the visit and samples are prepared based on a storage kit after the collection visit. For a specific patient on a study, click **Schedule** in the **Protocols** tab.

▶ Current Page: Study Patient >> Schedule

Demographics | Patient Profile | **Protocols** | Reports | Appendix | Specimens

Pat.ID: 0000-44445 Pt. Study ID: 0000-44445 Age: 57 years Gender: Female Pat.Name: Charlotte Herbinger Org: WCG - VELOS

Schedule

Initial Visit 01/12/2022 01/12/2022 01/11/2022~01/13/2022

[Edit Visit](#) [Add Unscheduled Event](#)

Suggested Date	Scheduled Date	Event Window	Event	Event Status	Linked Forms	Site of Service	Coverage Type	Additional Information
01/12/2022	01/12/2022		Baseline Evaluation	Not done	No CRF Prepare Samples	-	Q1	-

1. Click **Prepare Samples**.

Linked Forms

No CRF
[Prepare Samples](#)
[storagekitdemo\(1\)](#)

Submit Prepared Samples

3. Check checkboxes for one or more samples to submit, add a Status Date, and click **Submit**.

Prepare Samples

Prepare Samples for All Mark Event as Done

Status Date

Select	Name	Storage Type	Specimen Type	Expected Quantity	Apply to Collect and Current Quantity <input type="checkbox"/>
<input checked="" type="checkbox"/>	freezersampleoff	Freezer	Plasma	1.0	Millilitre

Submit **Close**

2. Click the storage kit link.