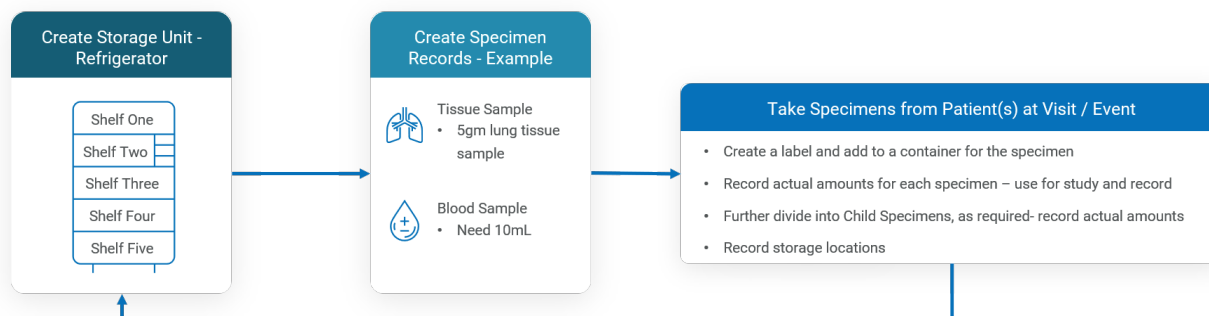


eSample Workflows



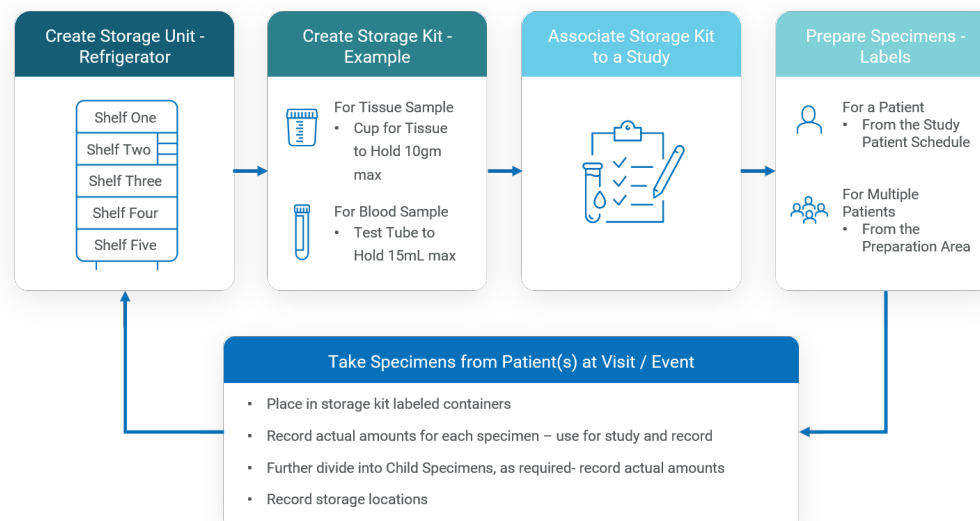
Manual Specimen Collection

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.



Storage Admin

eSample ▾ Reporting

Specimens

Storage Admin

Storage Kit Library

Preparation Area

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 Search

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

Storage ID: Storage Type:

Name: Allowed Specimens:

Study: Status:

Barcode: [Add New](#) [Add Multiple](#)

Click **Add New**.

► 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*:

Template Type:

Alternate ID:

Storage Unit Class:

Notes:

Location: [Select](#) [Remove](#)

Storage Capacity: ☐ Can store multiple Specimens

☐ This Storage Unit is a Template

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*:

Status Date*:

For Study: [Select Study](#)

For User: [Select User](#)

Status Notes:

Storage Grid Details : Child Storage Units

Child Storage Type:

Dimension 1 (Columns) #of Cells:

Dimension 2 (Rows) #of Cells:

Storage Naming Style:

Naming Convention:

Naming Convention:

Positioning:

Positioning:

[Submit](#)

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.

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**.

Current Page: Manage Inventory >> Storage Search

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

Storage ID: Storage Type: Location: [Select](#) [Remove](#)

Name: Allowed Specimens:

Study: [Select](#) Status:

☐ Show in Grid View ☐ Show Templates Only [Search](#)

Barcode: [Add New](#) [Add Multiple](#) [Update Status](#) [Print Label](#) [Delete](#) [Copy Storage Unit/Template](#)

ID	Name	Type	Location	Capacity	Status	Select
386	AMcbnt	Cabinet		1 Items	Available	<input type="checkbox"/>
385	AMfrzr	Freezer		1 Items	Available	<input type="checkbox"/>
396	No.453Cabnt	Cabinet		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.

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

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"/> Select Remove	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"/>

☐ Specimen not linked with Study

Barcode: [Scan Multiple](#) [Bulk Upload Area](#) [Add New](#)

Click **Add New**.

► Current Page: Manage Inventory >> Specimen Details

Specimens Storage Admin Storage Kit Library Preparation Area

Details

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

Specimen ID

Alternate ID

Description

Type*

Collection Date and Time [Reset](#)

Age at Time of Collection Years Months Days

Owner [Select](#)

Location [Select](#) [Remove](#)

Anatomic Site

Tissue Side

Pathological Status

Pathologist

Collecting Technician

Associations

Study [Select](#)

Patient ID [Select](#)

Organization

Visit/Event

Patient Study ID

Notes

Surgeon

Processing Technician

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.

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.

Current Page: Manage Inventory >> Specimens

Specimens | Storage Admin | Storage Kit Library | Preparation Area

Patient ID: Type: Select an option Organization: All

Specimen ID: Study: Status: Collection Date: More Specimen Details

Location: Select Remove Owner: Status Date: Processed Status:

Patient Study ID: Specimen not linked with Study ☐ Specimen not linked with Patient ☐

Barcode:

105_01	0000-44445	<input type="checkbox"/>	484744	0000-44445	0	07/02/2020	Initial Visit	Blood	Pending	09/10/2020	No	<input type="checkbox"/>
105	0000-44445	<input type="checkbox"/>	484744	0000-44445	0	07/02/2020	Initial Visit	Blood	Pending	09/10/2020	No	<input type="checkbox"/>
119	0000-44445	<input type="checkbox"/>	09877	0000-44445	0	02/02/2020	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.

Update Status

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

Child Units, Forms, and Labs

Forms

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

Current Page: Manage Inventory >> Specimen Details

Specimens Storage Admin Storage Kit Library Preparation Area

This is a Child Specimen

Print Label

Details

Labs

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

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.

Create New Child Specimens

Use these fields to add new child specimens.

Create New Child Specimens

of Child Specimens Quantity Process Select an option

Existing Child Specimens

Process Select an option

☐ Apply to All Child Specimens
☐ Apply to Selected Child Specimens

✓	Delete	Specimen ID	Collection Date	Type	Status	Status Date	Collected Amount	Current Amount	Process	Location
2 Selected				Select an option	Select an option					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	152_01	10/11/2021	Urine	Processed	10/25/2021	22.5 Millilitre	22.5 Millilitre	Select an option	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	152_02	10/11/2021	Urine	Processed	10/25/2021	22.5 Millilitre	22.5 Millilitre	Select an option	

e-Signature * 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.

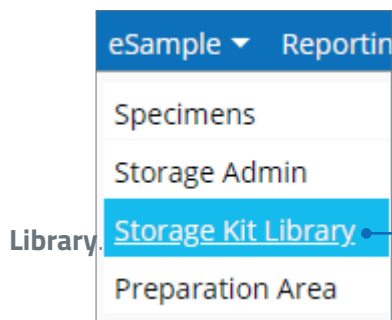
Set/Clear Location

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

Select/Remove

Click **Select** to access the details for a child specimen. Click **Remove** to remove the location for a specific child specimen.

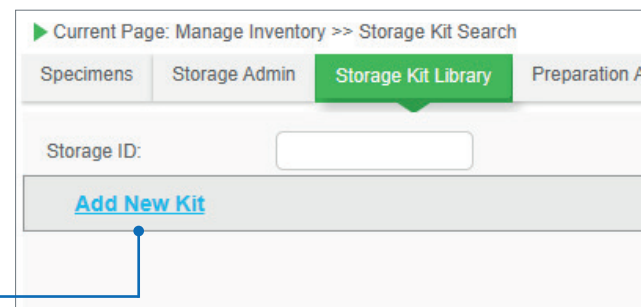
Storage Kit Library



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

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

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

Storage Kit ID Category

Storage Kit Name* Storage Kit Type*

Kit Components 1 [More Component\(s\)](#)

Name	Storage Type	Specimen Type	Quantity	Processing Steps	Seq#	Disposition	Environmental Constraints	Specimen Children	Delete
<input type="text"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	1	<input type="text" value="Select an option"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/>	<input type="button" value="⊗"/>
			<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	2		<input type="checkbox"/> Perishable	<input type="checkbox"/>	
				<input type="text" value="Select an option"/>			<input type="checkbox"/> Biohazard	<input type="checkbox"/>	
<input type="text"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	1	<input type="text" value="Select an option"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/>	<input type="button" value="⊗"/>
			<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	2		<input type="checkbox"/> Perishable	<input type="checkbox"/>	
				<input type="text" value="Select an option"/>			<input type="checkbox"/> Biohazard	<input type="checkbox"/>	
<input type="text"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	1	<input type="text" value="Select an option"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/>	<input type="button" value="⊗"/>
			<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	2		<input type="checkbox"/> Perishable	<input type="checkbox"/>	
				<input type="text" value="Select an option"/>			<input type="checkbox"/> Biohazard	<input type="checkbox"/>	
<input type="text"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	1	<input type="text" value="Select an option"/>	<input type="checkbox"/> Fragile	<input type="checkbox"/>	<input type="button" value="⊗"/>
			<input type="text" value="Select an option"/>	<input type="text" value="Select an option"/>	2		<input type="checkbox"/> Perishable	<input type="checkbox"/>	
				<input type="text" value="Select an option"/>			<input type="checkbox"/> Biohazard	<input type="checkbox"/>	

Notes

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...

☐ Baseline Evaluation ☒

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:

Role Types	Duration	Notes

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	Pa
Select	1832	ACW-OSA-urinecupsample	-	
Select	1838	Purple-Urine cup	-	
Select	387	storagekitdemo	-	

Preparing Samples - From Preparation Area

eSample ▾ Reporting

- Specimens
- Storage Admin
- Storage Kit Library
- 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 Event Status: Select an Option

☐ Include Previously Prepared Records

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

Current Page: 1 Total Pages: 1 Rows Per Page Showing 1 - 9 of 9 [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	N	<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	N	<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 *

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 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 Herbinge Org: WCG - VELOS

Screening/Enrollment **Schedule** Adverse Events Attachments Forms

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**.

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 01/12/2022

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

Submit **Close**

Linked Forms

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

2. Click the storage kit link.