

CANADIAN BIOSAMPLE REPOSITORY

BioBank 3 Clinic Manual

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BioBank 3

BIOBANK 3 is CBSR's open-source, customized inventory tracking program. Barcoded labels are placed on patient samples at the time of collection, prior to shipping to the central lab for processing and storage. The barcode-labeling program allows the sample to be labeled with an anonymized study number, removing identifying data and preventing human error while handling samples.

Log In → New Patient → Barcode Labels → New collection event → Dispatch

Patient Label Example

Patient ID barcode



The large 1D barcode (on the label) is your patient's assigned number – for sample collection.

Inventory ID barcode



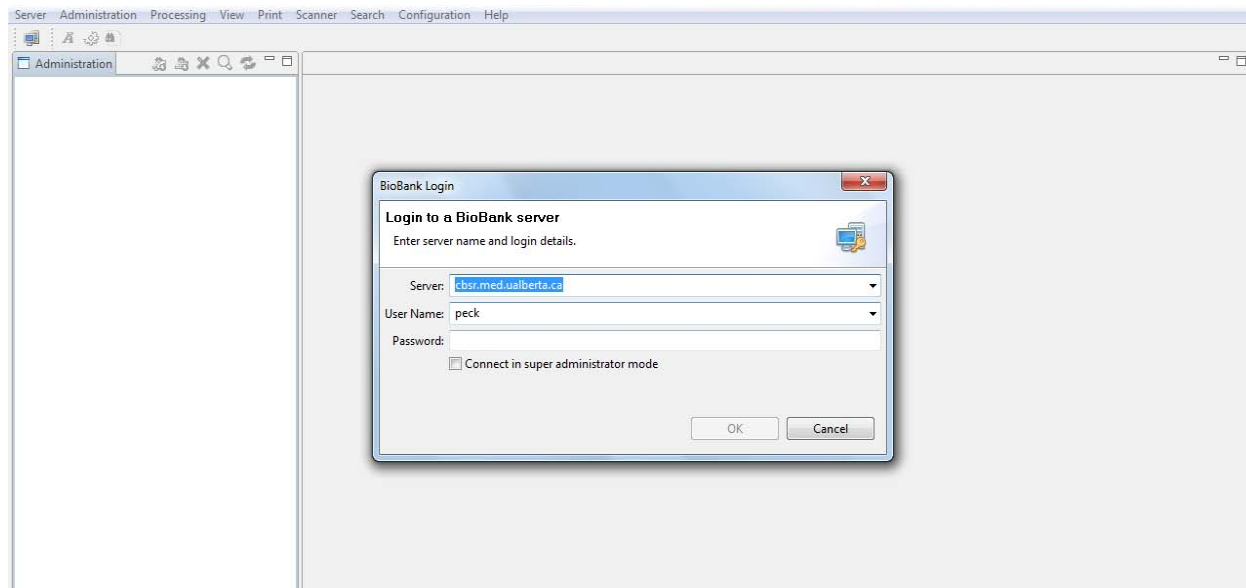
The small barcode is a randomly generated 2D barcode used to identify and track individual source specimens.

LOGGING IN AND OUT OF BIOBANK3

1. Select your “Server” from the dropdown list.

Cbsr.med.ualberta.ca - Live server

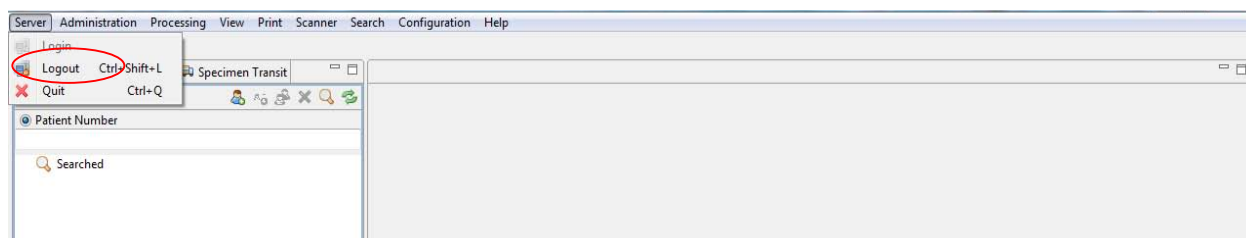
Cbsr-training.med.ualberta.ca - Practice server



2. Enter your assigned User Name and Password.

3. Press “OK”.

4. To log out left click the server button at the top of the page and press “Logout”.



CREATING PATIENT LABELS

Each CBR patient label contains a 1D barcode for the patient number and a unique 2D Data Matrix barcode for the specimen ID. Each specimen ID is unique amongst any patient labels printed in the past and in the future and further, is unique across patients such that two patients will never have the same specimen ID.

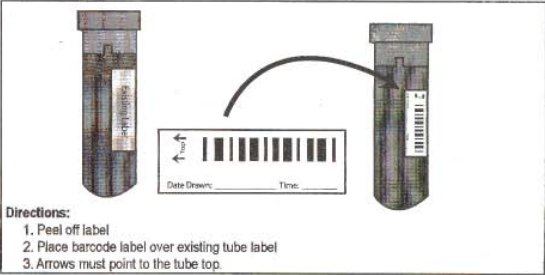
The image below shows a blank CBR Patient Label sheet. It is a letter sized, 8 1/2" x 11", sheet that feeds into any printer.

1
2

- Barcode Label Form -

Please Print
This form is to be kept on the patient chart. **DO NOT SEND TO CENTRAL LAB.**

3



Directions:

1. Peel off label
2. Place barcode label over existing tube label
3. Arrows must point to the tube top.

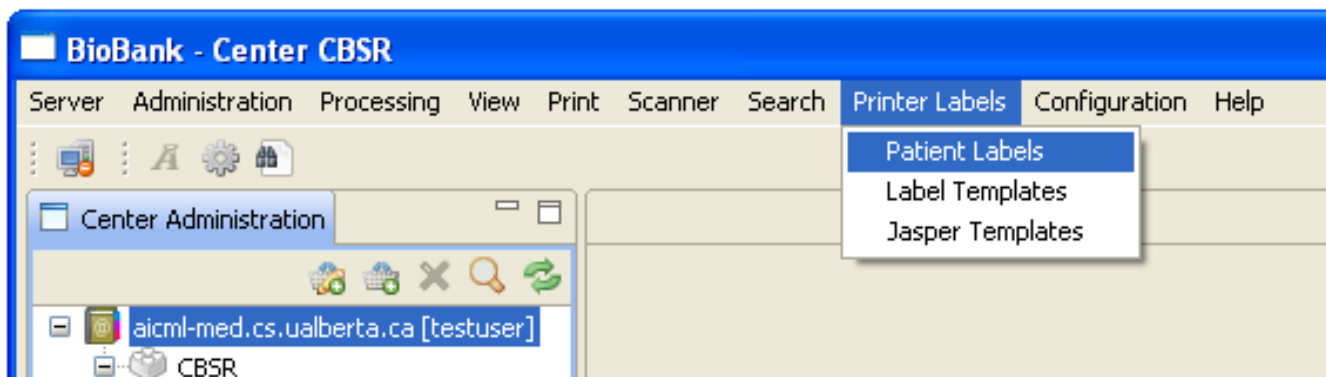
Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____
↕	↕	↕	↕
Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____
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Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____
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Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____
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↕	↕	↕	↕
Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____	Date Drawn: _____ Time: _____

The regions highlighted in orange are:

1. The title area. Clinics and sites can customize their label sheet by printing their own title text.
2. The logo region. A custom logo or graphic can be printed on the label sheet.
3. Patient information section. Up to 3 custom fields and barcodes can be printed in this region.
4. The individual patient labels that contain a 1D barcode for the patient number and a 2D barcode for the specimen ID. There are 32 labels in total.

Please follow the steps listed below to create patient labels for your collection.

1. Select **Printer Labels** → **Patient Labels** from the main menu.



2. Fill out the required information

The screenshot shows the 'Patient Labels' configuration window in the BioBank - Center CBSR application. The window has a menu bar with 'Server', 'Administration', 'Processing', 'View', 'Print', 'Scanner', 'Search', 'Printer Labels', 'Configuration', and 'Help'. The main content area is titled 'Patient Labels' and includes a subtitle 'Print source specimen labels for a patient'. The configuration is organized into several sections:

- Branding:** Contains fields for 'Title' (BBPSP), 'Logo' (C:\biobank32.png), 'Template' (Patient with Source Specimens Label Template), 'Intended Printer' (default printer), and 'Printer' (\\http://smb2.cs.ualberta.ca:631\cs228).
- Patient Information:** Includes a 'Patient Number' field and a table of custom fields.
- Additional Configuration:** Features an 'Enable' checkbox and a 'Specimen Type (on labels):' field (Sp. Type).
- Actions:** Contains an 'Export to PDF' button.

The user's email address, testuser@aicml-med.cs.ualberta.ca, is visible in the bottom right corner of the window.

a) In the branding section, the following information listed below should be entered:

Title This is the string that will be printed in the label sheet's title area. This field is optional.

Logo This allows you to select a graphic logo to be printed on the sheet. Press the button to select the graphic file from your computer. This field is optional.

Template This is the template that specifies the position and dimension information for where to print information on the sheet. The template name is a required field.

Intended Printer this is the printer the template was created for. You may have more than one template to select from. Each template is meant for a specific printer. This is displayed for informational purposes only.

Printer This pull down menu allows you to select the printer to use when printing the sheets. This menu displays the printers that have been configured on your computer. The printer is a required field.

b) In the Patient Information section the following information should be entered:

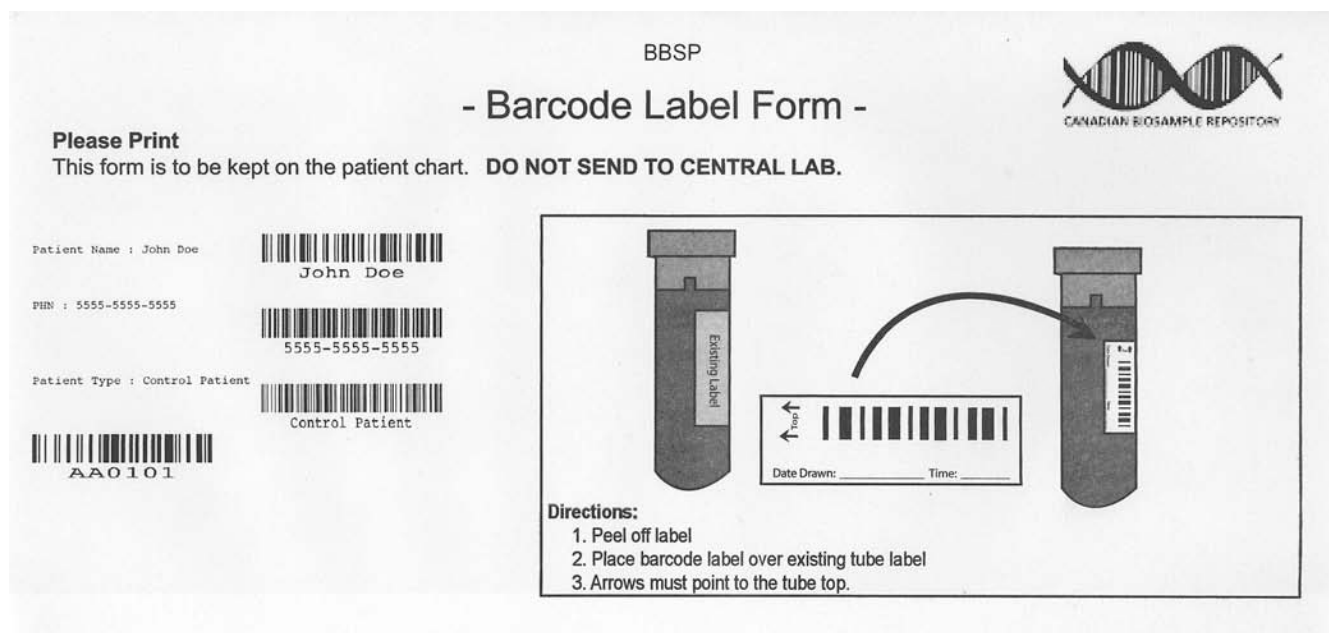
Patient Number Type the patient’s number into this box. Ensure this number matched the format that has been setup and approved for your study. A number is required.

Custom Fields Three custom fields can be enabled to print on the label sheet. The text box on the left is the field name and the text box on the right is its corresponding value. In this example, the following are used for custom fields:

Custom Field	Name	Value
1	Patient Name	John Doe
2	PHN	555-555-555
3	Patient Type	Control Patient

The checkboxes to the left of the field name can be used to enable / disable the printing of the field. The checkboxes in the middle are used to enable / disable printing of the value. The checkboxes on the right are used to enable / disable printing a 1D barcode for the corresponding field value. For example a 1D barcode will be printed with the text *John Doe* encoded on it.

The above two sections are printed on the top portion of the label sheet. The below image shows how your label sheet should look using the steps above.



3. Additional Configuration

If you would like to display text under the barcode, [The Additional Configuration](#) section for allows you to enter the text to be printed under the barcodes on each patient label. As seen in the image in section 2, additional configuration has been enabled with the text Sp. Type with underscore characters, and this will be printed as shown in the below image.



4. Print

To print a sheet of labels you can press the **Print** button at the top left of the form. Alternatively, instead of printing a sheet you can export the sheet to a PDF file by pressing the **Export to PDF** button.

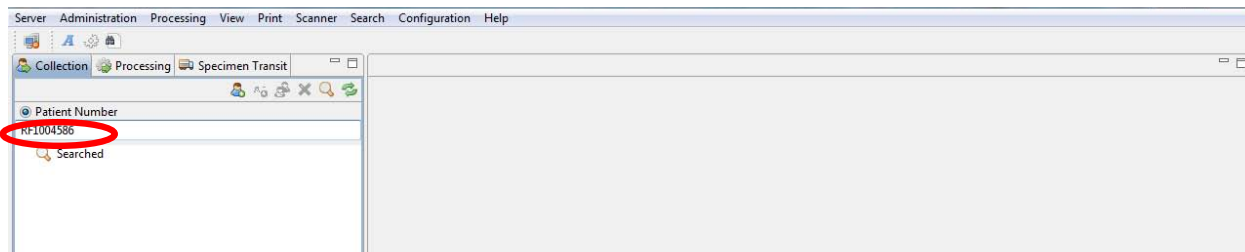
Once you have printed the required patient labels, proceed to Creating Patients.

CREATING PATIENTS

1. Select the “Collection” tab at the top left corner of the window.



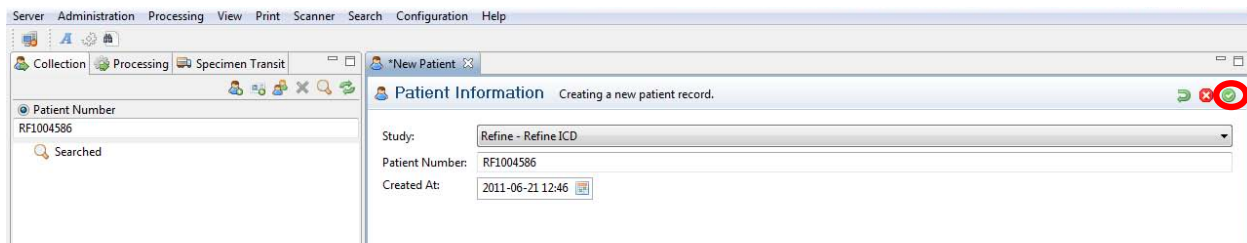
2. Using a Handheld 2D barcode scanner → scan your patient ID barcode (“Patient Number”) into the text field.



3. If the patient does not already exist → you will be prompted to create a “New Patient”. Press the “okay” button when prompted.

If your patient already exists → proceed to Creating Patient Labels (if required) or Collection Events

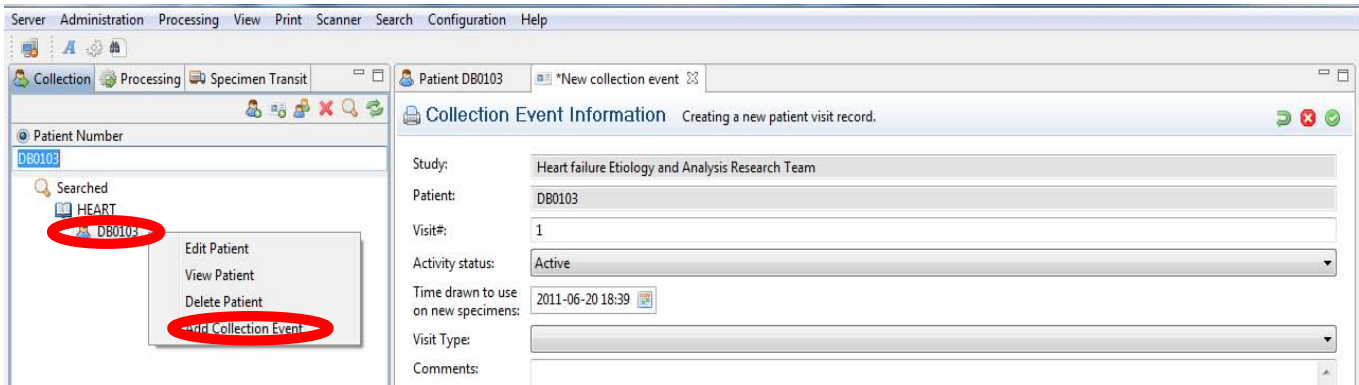
4. A “Patient Information” window will open. From the drop down field select the Study this patient number belongs to (Note: all other fields will auto-populate and should not be changed.) Press the green check mark (✓) at the top right hand corner of the window to confirm the data entered.



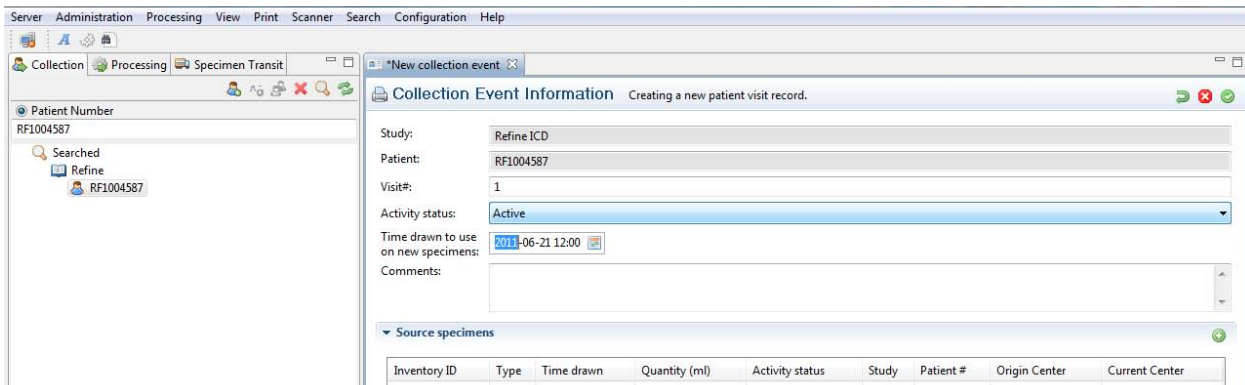
Once you have created a patient label, proceed to Create a Patient.

COLLECTION EVENTS

1. In the left window → right click the Patient Number that you entered in Step 3. Select “Add Collection Event” from the list.

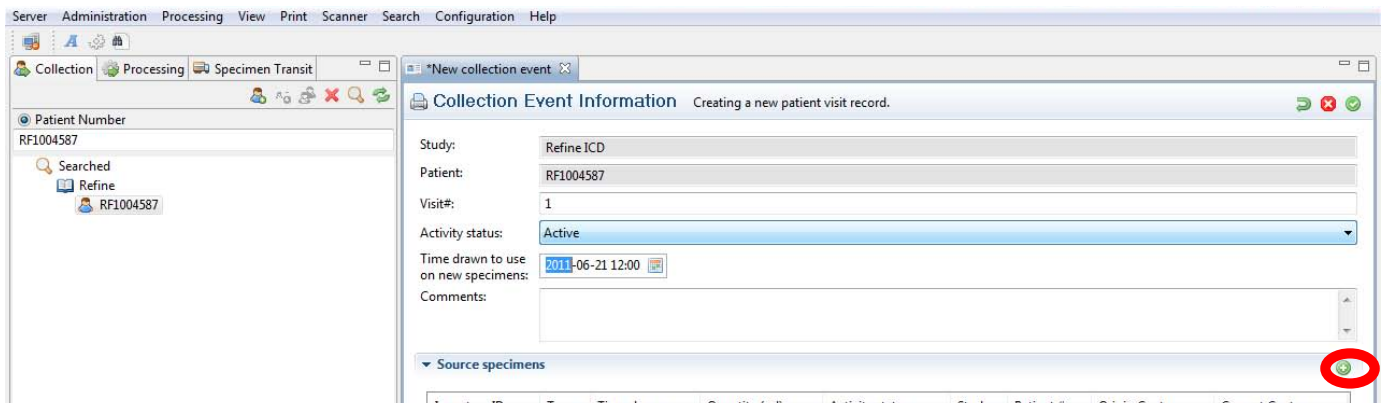


2. Once the “Collection Event Information” window has opened on the right side of the screen → enter the following information:



- a. **Visit #** - The numerical value indicating if this is the patient’s first or subsequent (Follow-Up) visit. (Note: if blood and urine are collected on 2 separate dates, having the same visit number will link the samples to each other).
- b. **Activity Status** - Will automatically populate with “Active”. Do not change.
- c. **Time drawn to use on the new specimens** - This value will automatically populate for all your source specimens. For convenience enter in the most common draw time.
- d. **Comments** - This field is for the entry of any additional information relating to the patient’s visit or specimen collection.

3. **Left click** the green plus sign (+) below to open the “Add specimen” window.



4. After the “Add specimen” window opens → enter the source specimen’s information.

a. **Inventory ID** - With a 2D handheld scanner → scan the 2D the inventory or specimen ID of the first source specimen being added.

b. **Type** - Select the type of source vessel the 2D barcode belongs to. If the source specimen being entered is not listed → unclick the check box to display all source vessels registered in BIOBANK 3.

c. **Time drawn** - This field will auto-populate with the time entered in the “Collection Event Information” window. **If the source specimen being added has a different time than then recorded in the Collection of Events Information window, enter the new time here.**

d. **Activity Status** - Leave this set to “Active”.

e. **Comment** - This field is for the entry of any additional information relating to the source specimen (i.e.: low volume, possible contamination, etc).

5. After the filling out all the fields, click:

→ the “Next” button to add another source specimen

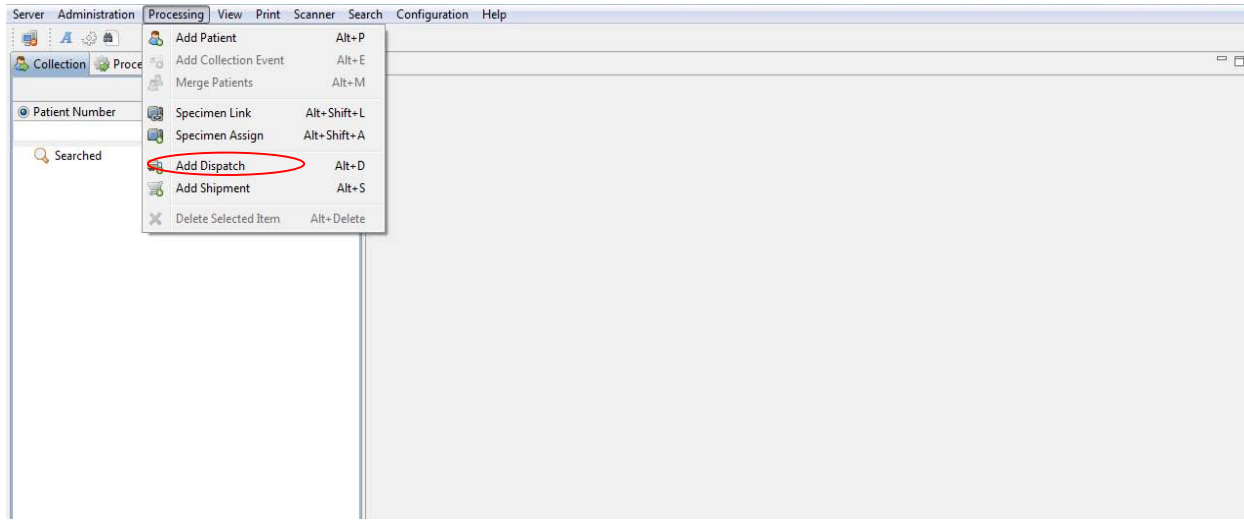
or

→ the “Finish” button to close the “Add specimen” window.

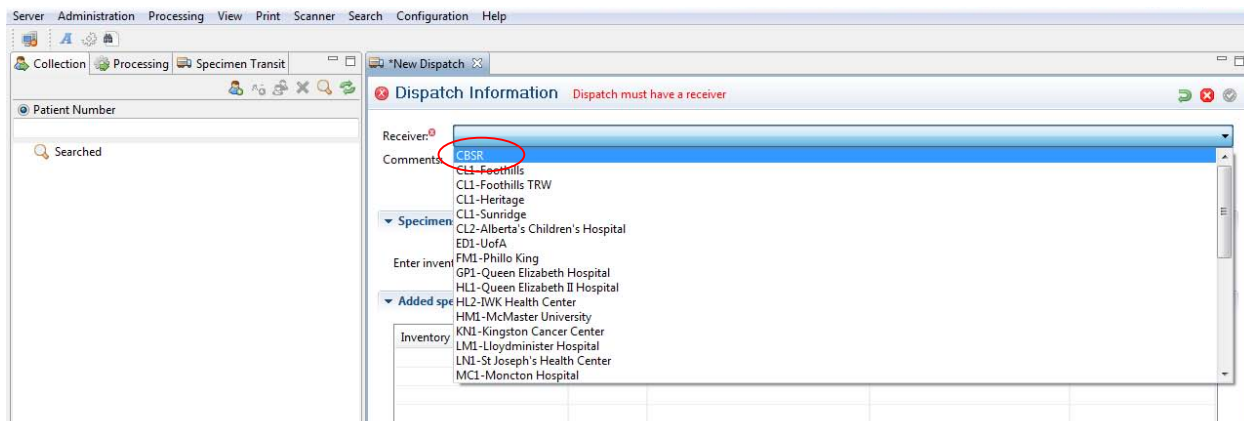
6. When the “Add specimen” window has been closed, ensure all information is entered correctly. Press the green check mark (✓) at the top right of the window to confirm your collection event.

DISPATCHING TO CBSR

1. From the “Processing” tab at the top of the screen → select “Add Dispatch” from the drop down list.

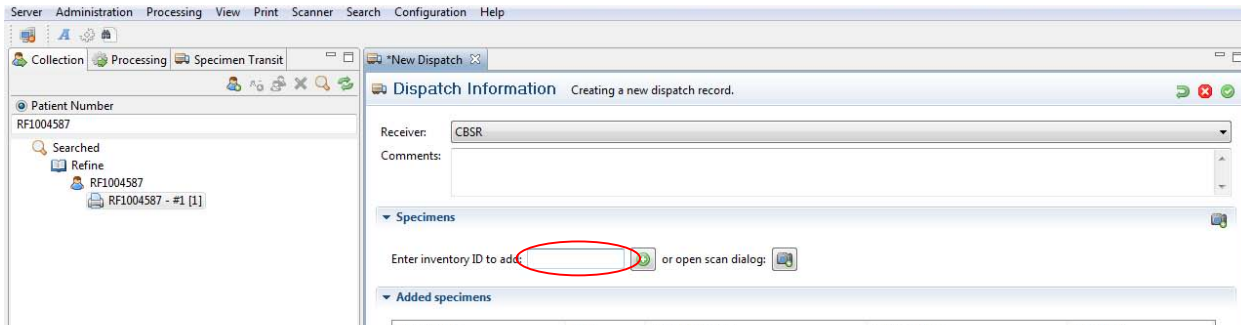


2. After the “Dispatch Information” screen opens on the right → select CBSR as the “Receiver”.

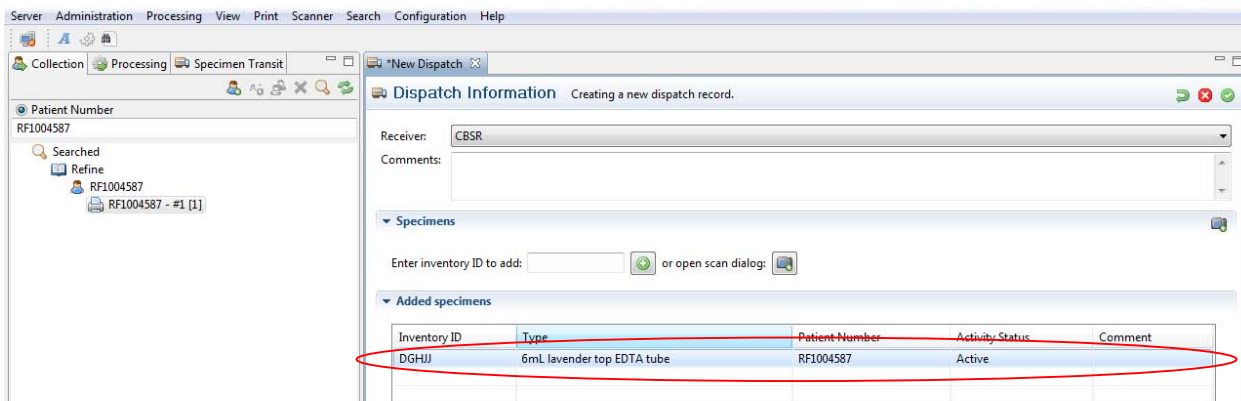


3. If there are any additional comments for the dispatch - add it to the Comments section.

4. With a 2D handheld scanner → scan the “inventory/specimen ID” located on the patient label of the source specimen. Entering the inventory/specimen ID to this field will add the source specimen to this dispatch.

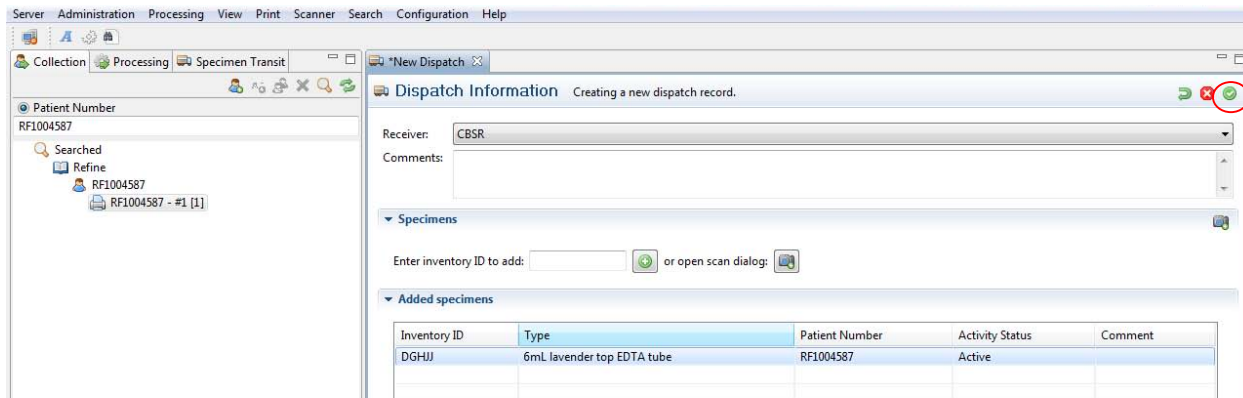


5. The tube entered above will now appear in the “Added Specimens” window. Ensure it matches the tube you intend to send in this dispatch.

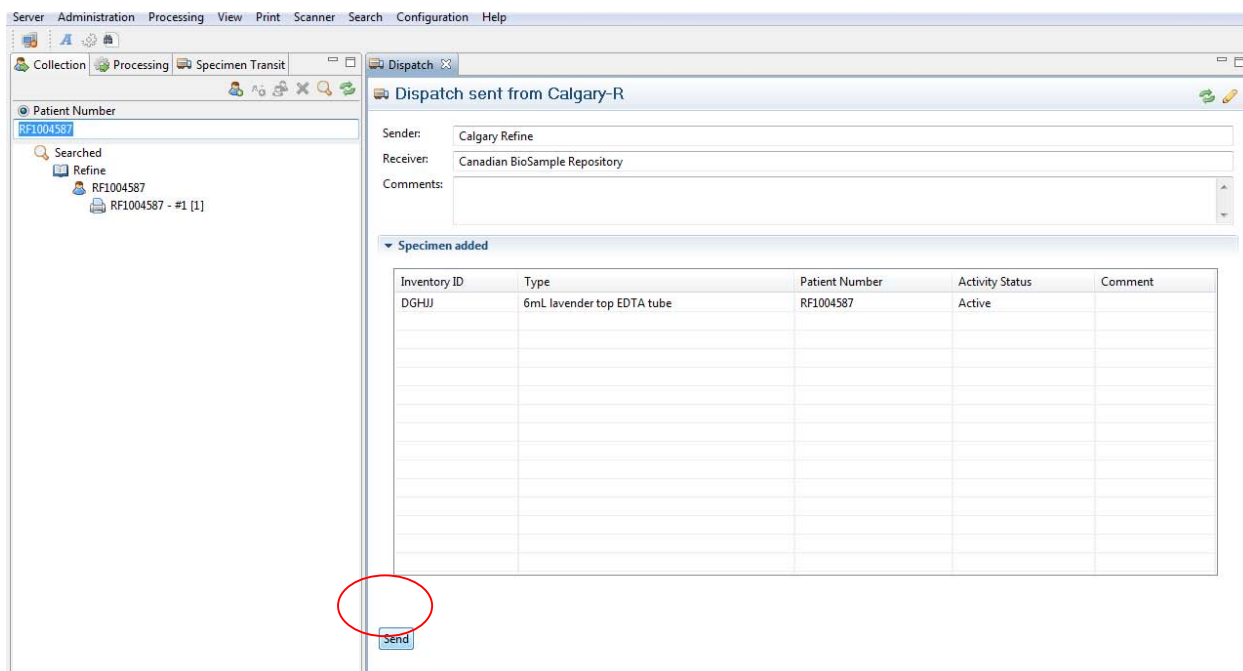


6. If you have multiple tubes to dispatch → repeat Steps 4 and 5.

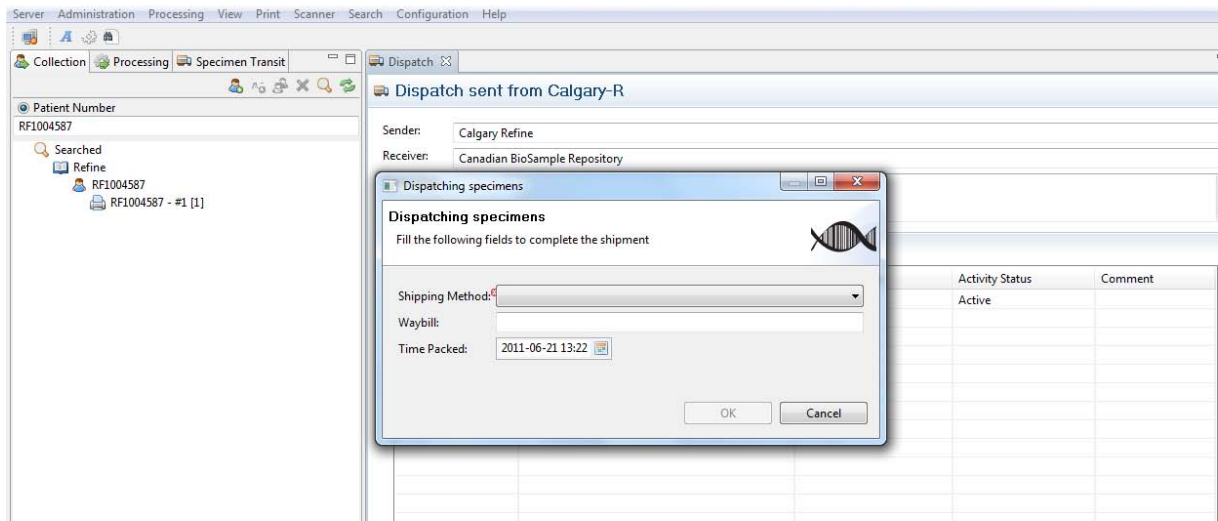
7. Once all the Specimens that will be sent in this dispatch have been added → click the green checkmark (✓) at the top right hand corner of the window to confirm your dispatch.



8. Press the “Send” button that appears at the bottom left hand corner of the “Dispatch” window.



9. The “Dispatching Specimens” window will pop up. For the Dispatch, enter your shipment information as follows:



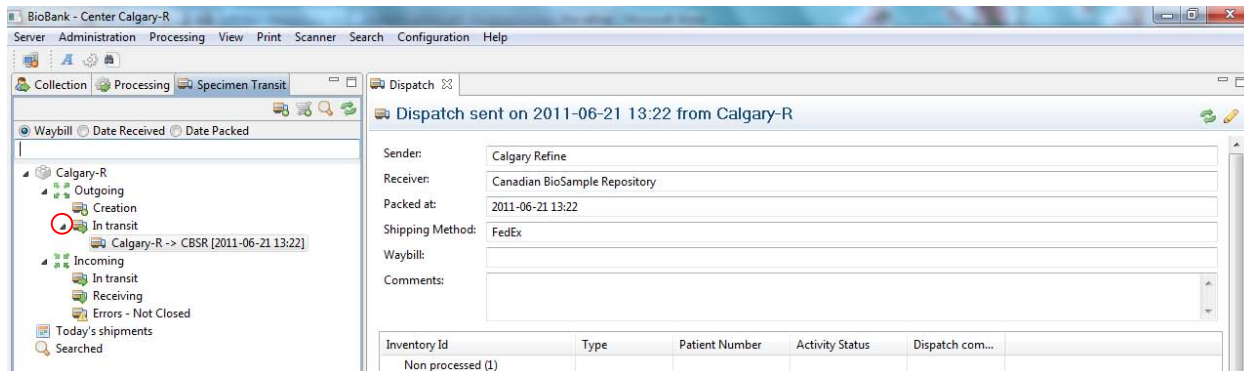
- a. **Shipping Method** - This is the courier method (FedEx, DHL, etc) with which the shipper will be sent.
- b. **Waybill** - Enter your waybill information if available, if not this field can be left blank temporarily (See step 11 to complete.)
- c. **Time Packed** - The time that the shipping vessel is ready for shipment.

10. If all the information entered is correct → Click the “Ok” button to confirm the shipping information.

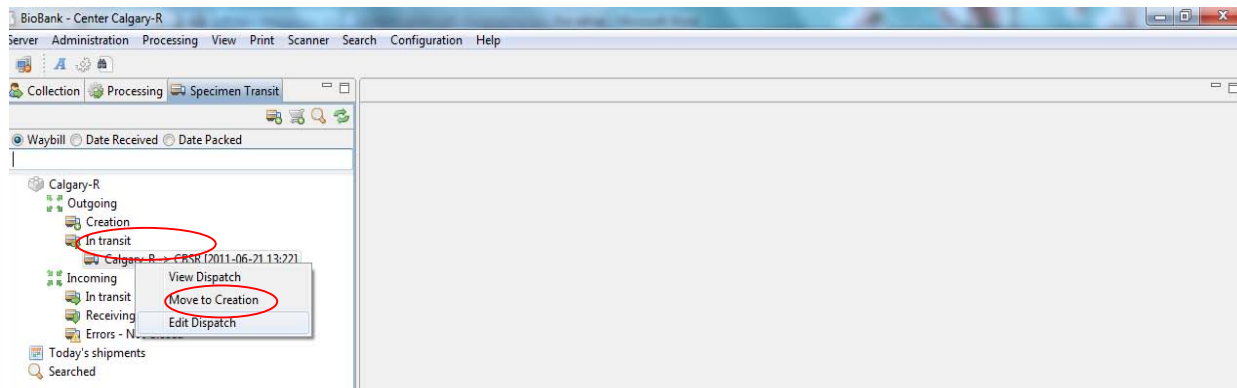
11. If the waybill number was not available at the time of creating the dispatch → left click the “Specimen Transit” tab.



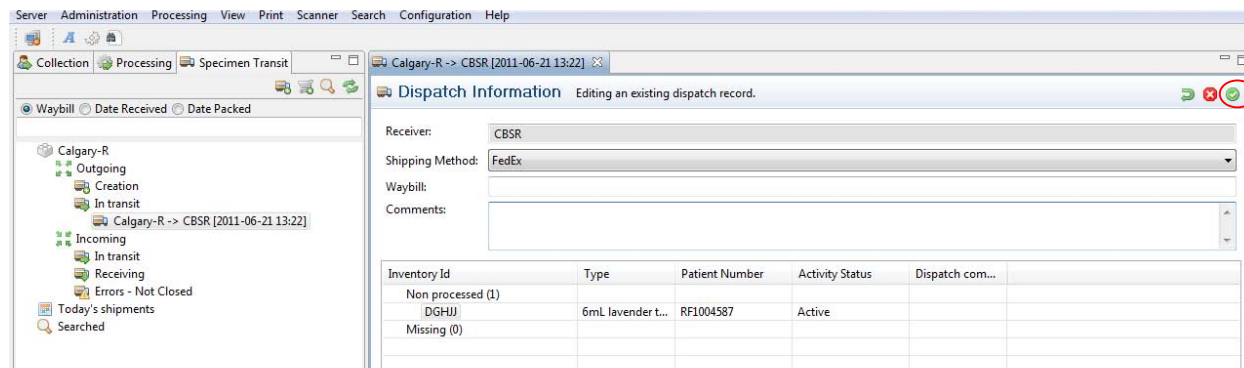
12. Under 'Outgoing' → press the triangle (Δ) next to 'In Transit' to show all dispatches (sample shipment) currently in transit from your collection site.



13. Right click the dispatch to be edited and click "Edit Dispatch".



14. After the window opens on the right → enter the courier Waybill number and press the green checkmark (✓) on the top right hand corner of the window to confirm.



15. Once CBSR has received and accepted the dispatch, it will no longer appear under the 'in transit' page for your collection site. Dispatches can still be tracked by either the "Waybill" number or "Date Packed" (the date the shipment was packed).

Server Administration Processing View Print Scanner Search Configuration Help

Collection Processing Specimen Transit Dispatch

Waybill Date Received Date Packed

2011-06-21 Go

Calgary-R

- Outgoing
 - Creation
 - In transit
- Incoming
 - In transit
 - Receiving
 - Errors - Not Closed
- Today's shipments
- Searched
 - Calgary-R -> CBSR [2011-06-21 13:22]

Dispatch sent on 2011-06-21 13:22 from Calgary-R

Sender: Calgary Refine

Receiver: Canadian BioSample Repository

Packed at: 2011-06-21 13:22

Shipping Method: FedEx

Waybill:

Date received: 2011-06-21 14:54

Comments:

Inventory Id	Type	Patient Number	Activity Status	Dispatch com...
Non processed (0)				
Received (1)				
DGHJJ	6mL lavender t...	RF1004587	Active	
Extra (0)				
Missing (0)				

CBSR Support

CBSR is happy to provide support for our BB3 software, collection labeling and shipping of samples. We have two methods of providing this support for your study.

SUPPORT

Our technicians will be happy to discuss any questions or concerns you may have about the labeling and shipping of specimens. CBSR technicians can be contacted in 3 ways. During normal business hours (Monday to Friday 8am-8pm MST, Sat 9am-5pm MST) via Skype at the address CBSR-Help, via phone at (780) 492-4574 or by email at tech@biosample.ca.

Please Note: Outside of the normal business hours, you are required to send an email to our technicians. Our Technicians will not be available until normal business hours.

**We highly recommend contacting us via Skype so we can use video to chat with you!*

BIOBANK 3 SOFTWARE SUPPORT

Biobank 3 has a help tab on the top of the screen. Should you have any issues with the program, please click on HELP, and choose from one of the listed options. If you are in need of further assistance, please select the “Contact CBSR for Help” option from the HELP list and you will be re-directed to our website: <http://www.biosample.ca>, where you can find further information on how to contact our staff.

FORMS

All of the required forms for supply requests, shipment notifications and other required forms can be found on our website at <http://www.biosample.ca> under the tab “File Cabinet”