Title: Procedure for U01 Sample Check-In

Purpose: To record the arrival of U01 clinical site sample shipments, check in the specific tubes and their physiological condition upon receipt; to place, record and QC samples into the appropriate storage location at CLASS; and to send an electronic mail confirmation message to the clinical sites and coordinating center.

Procedure:
1. All sites have been instructed to notify CLASS of a shipment and receive a CLASS confirmation statement prior to sending a shipment. Upon receiving a message from a site indicating their intention to send a shipment, the intended carrier and the tracking number, kindly reply stating that CLASS will be on the lookout for the shipment in an email entitled “received shipment message.” Should the site not indicate the carrier or the tracking number, ask this information in the text of the message. Post this email communication on the sample check-in corkboard so that sample check-in personnel will be alerted to incoming shipments.

2. Sample check-in personnel are to check and update the sample check-in corkboard periodically during the day. If an expected shipment has not arrived by 3:00 p.m. track the shipment through the shipping carrier to determine its location and status. If the shipment will be delayed, notify the Lab Manager and the site as soon as possible. Mark the email communication with the word “DELAYED.”

3. Regardless if a clinical site notifies CLASS of an arriving shipment, at the time the shipment arrives, send a “notification of receipt” message to the clinical site indicating that the shipment was received, the shipping carrier and the tracking number. Re-read the email communication posted on the sample check-in board and check to ensure the appropriate shipment (or number of boxes) has arrived. At that time please write the words “RECEIVED” on the email message posted on the board. At the end of the day as an extra QC measure, check that all the messages posted on the corkboard are marked “RECEIVED” or “DELAYED.” If a message is marked “RECEIVED,” the message is to be discarded.

4. Visually inspect the tubes at sample preparation station in Room A124 for evidence of thawing. If the tube is not frozen solid, mark the tube unobtrusively with a sharpie or other pen. Mark partially thawed tubes with a 'P' and completely thawed samples with a 'T'. According to the Procedure for Snap Freezing Clinical Research Samples, snap freeze the samples in an upright manner. If the check-in process needs to be delayed at this time, the samples may be left in a backed up, alarmed -80 degree C ultralow freezer at CLASS, however, the samples must be clearly labeled with the site information, the date of receipt and the shipment number. The procedure is to be continued as soon as possible. File packing slips in the U01 Shipping labels Binder.
located on the shelves in Room A124; assign the shipment the next shipment number and record the date and initials of the laboratorian who signed for the package.

5. Open the CLASS Website, http://swan.class.sph.umich.edu (behind the firewall) or http://141.211.25.97/ (outside the firewall for laptop users only), using Mozilla Firefox, select SWAN Portal and log on using the assigned name and password. If there are any questions regarding passwords, contact the Lab Manager, Director or the Manager of Information Technologies. Select ‘Shipments’ from the Navigation window, Navigation drop down menu, or “shipments” option in the header graphic. This will bring up the ‘Find Shipment’ page; click on the ‘Edit Shipment’ tab at the top right of this page and then select ‘Define New Shipment.’ Select the site from which the samples were received, the carrier, packing slip ID# and tech initials; these are pull down fields. Enter observations in the comment field as well. The date that the record is opened and the Shipment ID# will automatically appear, however, the date the shipment was received may be modified. Place the shipment into an alarmed -80 degree C ultralow freezer at CLASS.

6. Handle biohazardous materials using the Universal Blood and Body Fluid Precautions. A poster of these precautions is in Room A122 and A124 and they include wearing a lab coat and gloves at all times; safety glasses are also recommended and they may be found in Room A122; gloves may be found in Room A122. Full precautions are detailed in the Procedure for Universal Precautions. Carry out the following steps before checking in the samples:

a. Make sure that there are blue pads on the sample preparation station. Blue pads may be found in Room A122.
b. Obtain styrofoam container and fill with dry ice, or put dry ice on top of a piece of styrofoam. Dry ice may be obtained from the moveable dry ice chest located in Room A124.
c. Remove packing material and dry ice from the shipping container and check that all tubes have been removed from the shipping container.
d. Place 5 mL serum tubes and simport (repository) in tube racks for convenience. Urine tubes from the DHS kit may be left in the labeled Eastern boxes until scanned. The tube racks should be labeled with the shipment number, the site and date the shipment was received and the racks are to be placed on dry ice during the check in procedure.

7. To check in a sample open the CLASS Website, http://swan.class.sph.umich.edu/ using Mozilla Firefox and log on using the assigned name and password. If there are any questions regarding passwords, contact the Lab Manager, Director or the Manager of Information Technologies. Select ‘Samples’ from the Navigation windows drop down menu, or ‘samples’ option in the header graphic. Then select
‘Edit Samples’ from the Navigation window. Then select ‘Define new sample’ button from the Navigation window. In the ‘Sample check-in’ screen enter the shipment number, then press load. The information about the shipment will appear. If you don’t know the shipment number press ‘Find’. The ‘shipment pop up’ screen will open. If the shipment is not visible, press the Carrier/Date/Site criteria and click the SEARCH button. When the Shipment is visible, click on the I.D.(underlined). When the Shipment is highlighted, click the ‘Select this shipment’ button. Once the shipment is found place the box number into the ‘BOX ID’ window. If you don’t know the box number, press the ‘FIND’ button. The ‘BOX SELECTION’ screen will appear. If the box is not visible in the window, press the Freezer/Sample Type/Year criteria and click on the ‘SEARCH’ button. When the right BOX is visible, click on its I.D.(Underlined). Press the ‘SELECT THIS BOX’ button; the box will appear in the ‘BOX ID’ window. If the box is not in the database, select the ‘NEW’ button. The ‘NEW BOX DEFINITION’ window will appear. Insert the box I.D. into the ‘BOX ID’ window. Next select the ‘BOX TYPE’ by pressing the ‘SELECT’ drop down menu. Select tube type (5ml or Simport). Next select the ‘FREEZER’ by pressing the ‘SELECT’ drop down menu. A list of freezers will appear. Select the appropriate freezer number. Then select the appropriate technician from the ‘SELECT’ drop down menu. Select the location where the box will be stored by pressing the ‘SELECT’ drop down menu. Next indicate which rack the box will go into by pressing the ‘SELECT’ drop down menu. The next step is to give the rack a number. Press the ‘SUBMIT’ button to enter the data into the computer. Press the ‘CLOSE’ button to go back to the ‘SAMPLE CHECK IN SCREEN’. Press the ‘LOAD’ button. All the information about the box will appear, also a picture of the box will appear. Select which position the sample will go into. Select any comments from the ‘COMMENT’ scroll down menu. If the tube has been marked as thawed or partially thawed, enter this information in the comments section. If the sample has been frozen to the top or side of the tube, indicate this information as well. Select the volume of the tube by pressing the ‘VOLUME’ button. If there is sample in the tube press ‘GO’. If the tube is empty press ‘NOGO’. Empty tubes are not to be shipped to CLASS. If by chance an empty tube is received, enter the SID in the U01 Empty Tuber and discard the tube. Select the person who is putting the sample into the database by pressing the ‘TECH’ drop down menu. Manually type or scan in the tube ID# with the bar code scanner. If you are typing for this field or any other, remove the glove from that hand. Then press the submit button. Place adequate dry ice underneath and around the storage boxes to ensure samples stay completely frozen and then position the tube into the corresponding location. 5mL serum and 5mL urine tubes are stored in separate three inch storage boxes. 5 mL red-capped (serum) tubes (S1, D1) are to be placed into three inch tall storage boxes alternately; i.e. one tube into an even box and the next tube into an odd box. 5 mL yellow-capped (urine) tubes are to be placed into three inch tall storage boxes consecutively with DHS “A” tubes placed in even boxes. DHS “B” tubes should be sent directly from the sites to Repository. Should a
DHS “B” tube arrive, place it in a separate box marked Repository in 27/28U and notify the Lab Manager. Simport tubes (S2) are to be placed into two inch tall storage boxes alternately; i.e., one tube into an even box and the next tube into an odd box. Micrew tubes (S3-S21, P2-P4, U2-U9, D2-D7) should be sent directly from the sites to the Repository. Should they arrive at CLASS, again place them in a separate box marked Repository in 27/28U and notify the Lab Manager. They will be shipped to the Repository per the Procedure to Ship Errant SWAN Tubes to the Repository.

8. To QC a shipment log onto the CLASS Website, http://swan.class.sph.umich.edu/, using Mozilla Firefox and log on using the assigned name and password. Click ‘SHIPMENTS’. Go to ‘FIND SHIPMENT’ on the Navigation windows drop down menu. Locate the shipment you wish to QC, press ‘LIST’. The ‘To Create A List’ page will appear. Put your email address into the field, click the ‘SEND’ button and the list will be sent to your email. Go to EXCEL and open your attachment folder, select the correct attachment that corresponds to the shipment you wish to QC. Save this email in tubes received folder on the A124/PC hard drive. Print a copy to check each sample identification and subsequent box/row/column position by comparing this tubes received document to the sample in the box. If there are discrepancies, make the correction in the CLASS Website (refer to step #7). Save the tubes received document in the tubes received folder on the A124/PC; it is located in the U01 folder: sample checkin information. After you have QC’d the shipment save a copy of this file in the email confirmations folder also located on the A124/PC: U01 folder: sample checkin information. Send a “Confirmation of tubes received in a shipment” e-mail to the contact person at the appropriate site and indicate how many tubes were received, the number of each type of tube received, date that the shipment was received, comments and attach the document to the message.

9. Return shipping containers immediately. Make sure that the styrofoam shipping container that the samples arrived in is empty of dry ice. Remove labels from the styrofoam shipping container that would indicate that the container still has biohazardous materials or dry ice. Tape the package securely with clear tape. Some containers will have straps and will not need to be taped. Take the appropriate pre-printed address sheet located on the shelves in room A120A and/ A124 and add the following information: UPS Ground, Mail Services, the number of boxes, the account number, your initials and the date. Make a copy of this for administrative purposes and place it in the front pocket of the current U01 Module Shipping Records Notebook. Add a barcode label found on the shelves in A120A to the package; these are provided by Mail Services. Also fill out and add a green shipping label to the package; these are also provided by Mail Services.