

DONOR AND PARTICIPANT MANAGEMENT

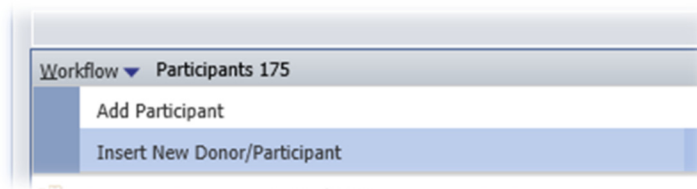
This guide covers creating and working with Donor and Participant records within Achiever. Note that while it is possible to store samples without a Donor record on Achiever, this should only be used for samples which do not require consent as the consent records cannot be stored without the Participant record.

A Donor within Achiever represents an individual person. The record will include data such as a reference number, and can optionally include demographic information and clinical data. The Donor record can provide samples to number of different Collections and this relationship is maintained through Participant records. A Participant record can store a further Collection-specific reference number, the Participant role (tissue donor/healthy volunteer), and the Consent details for Samples held within the Collection.

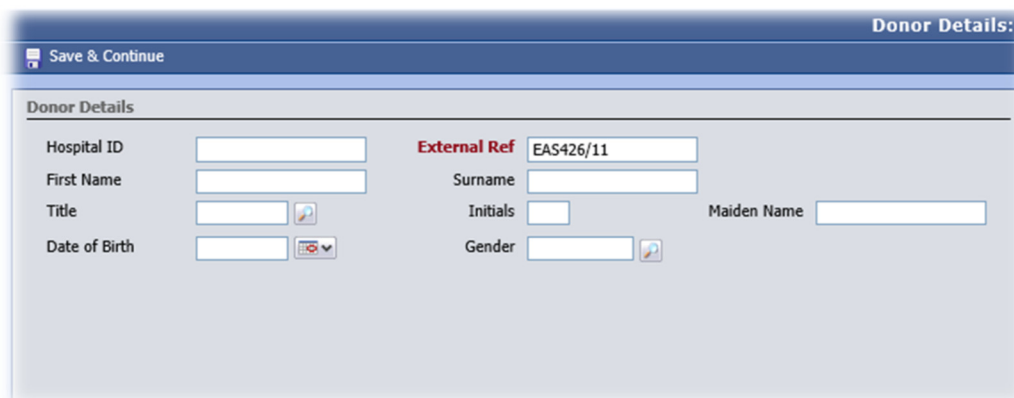
In most cases, the Donor, Participant, and Consent records are created through a single workflow process.

ADDING A NEW DONOR

- First, open the Collection in which samples will be stored
- Open the Participants navigation option
- From the Participants grid, select the Insert New Donor/Participant workflow



- The user will need to search through existing Donors before they are able to add a new one. Enter the necessary details here and select 'Search', following the search a new button will appear 'Insert Donor'.
- If the Donor does appear within the search, they will not need to be created again. If adding samples, find the respective Participant record from the Donor. If the Donor exists but within a different Collection, follow the 'Add Participant' workflow from the current Collection's Participant grid (as above).
- When creating the new Donor, the only mandatory field is 'External Ref' – this should be unique system-wide therefore do not consider simple numbers like 1234.
 - Having duplicate references can cause issues when performing bulk imports



- Clicking Save & Continue will open the Consent Form window

- Complete the mandatory fields, plus any applicable opt-outs. You may also enter opt-outs or specific restrictions in the Restrictions field. Any sample viewed linked to a Consent record which has these restrictions or opt-outs will feature a warning for the user to refer to the consent form.

Used Up <input type="checkbox"/>	Relevant Material <input checked="" type="checkbox"/>	Component <input type="checkbox"/>
Destroyed <input type="checkbox"/>	Consent Opt Outs <input checked="" type="checkbox"/>	On Loan <input type="checkbox"/>
Checked Out <input checked="" type="checkbox"/>	Consent Pending <input type="checkbox"/>	Available For Loan <input type="checkbox"/>

Consent Opt Outs or Restrictions in Place

- Physical location does not need to be specific, and may refer to a team who may manage consent eg 'Research Nurses, RVI'.
- Files may be uploaded to the Consent Form. Note that unless the Anonymous field is checked, the upload will be considered confidential and only viewable by Collection Staff with the appropriate access rights. ***If attaching consent records, ensure is it lawful to store these documents on University infrastructure.***
- Clicking Save & Continue once more will bring up the Participant record. Here enter the final mandatory field for Role. If there is further Donor/Clinical data to enter at this point, clicking the icon beside Donor ID will re-open the Donor record. Alternatively, the user may continue to the Samples grid to add Samples for this Donor/Participant.

ADD A NEW PARTICIPANT RECORD TO AN EXISTING DONOR

- If a Donor participates in multiple Collections, it is not necessary to create a second Donor record.
- Follow the 'Add Participant' workflow from the Collection's Participants grid
- Search for an existing Donor, then enter the Consent details
- A new Participant record will be created, ready to add new Samples