

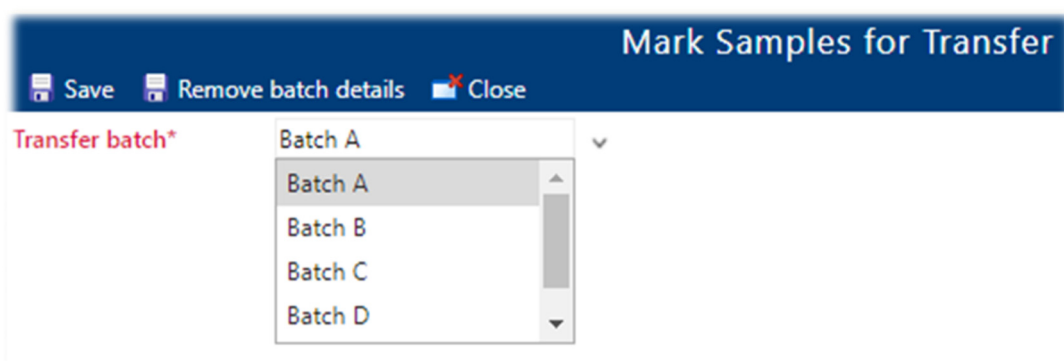
TRANSFERRING SAMPLES BETWEEN COLLECTIONS

This guide explains the process that can be followed to transfer Sample records between Collections. Optionally, Sample records may be transferred directly into a Sub-Collection on a destination Collection.

This functionality is available only to the Oversight Officer on the Collection where Sample records currently reside. Samples may be transferred to any Collection of type NHS REC Approved RTB.

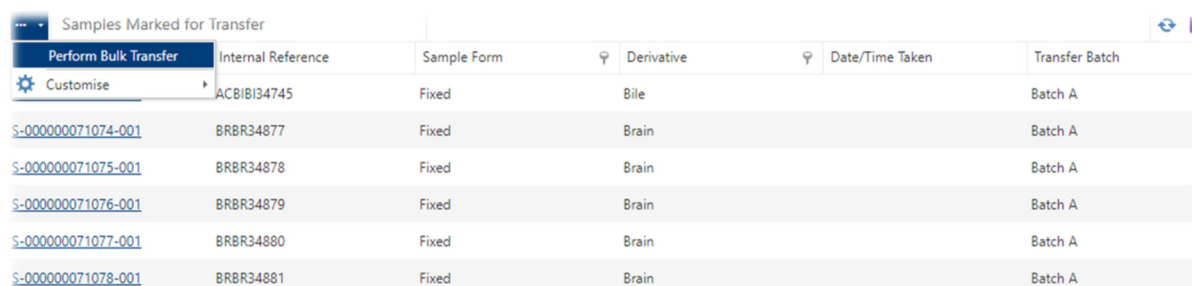
CHOOSING SAMPLES TO TRANSFER

- Samples must be added to a batch prior to the transfer. This batch may be edited or cleared prior to the final transfer
- Use the 'Mark for transfer' workflow from the Samples grid in either the Collection or Sub-Collection screens



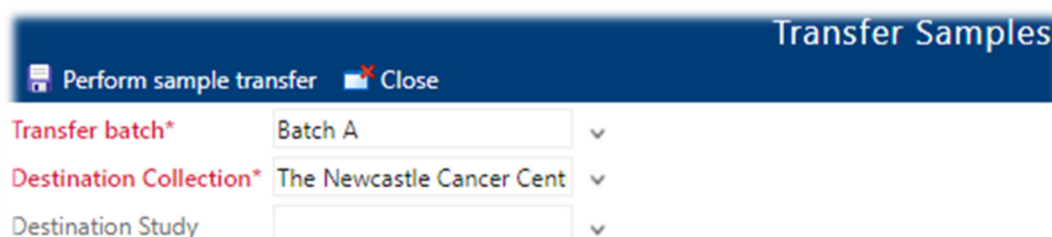
The screenshot shows a dialog box titled "Mark Samples for Transfer". At the top, there are three buttons: "Save", "Remove batch details", and "Close". Below the buttons, there is a section labeled "Transfer batch*" with a dropdown menu. The dropdown menu is open, showing four options: "Batch A", "Batch B", "Batch C", and "Batch D". "Batch A" is currently selected and highlighted.

- 5 Batch options are available, pick one and select Save to assign the selected Sample records to that batch
- Batch assignments can be removed from selected Sample records by choosing 'Remove Batch Details'
- Batch assignments for the current Collection can be viewed within the 'Samples Marked for Transfer' navigation option from the Collection screen



The screenshot shows a table titled "Samples Marked for Transfer". The table has columns: "Internal Reference", "Sample Form", "Derivative", "Date/Time Taken", and "Transfer Batch". There are six rows of data, each with a sample ID (e.g., S-000000071074-001) and a corresponding internal reference (e.g., BRBR34877). All samples are marked as "Fixed" and have a "Derivative" of "Brain". The "Transfer Batch" for all samples is "Batch A".

- To perform the transfer, select the 'Perform Bulk Transfer' workflow from the Samples Marked for Transfer grid.
- A batch, and destination collection must be chosen. Optionally, a destination sub-collection may also be selected



The screenshot shows a dialog box titled "Transfer Samples". At the top, there are two buttons: "Perform sample transfer" and "Close". Below the buttons, there are three fields: "Transfer batch*", "Destination Collection*", and "Destination Study". "Transfer batch*" is set to "Batch A". "Destination Collection*" is set to "The Newcastle Cancer Cent". "Destination Study" is currently empty.

- Clicking 'Perform sample transfer' will perform the move

POINTS TO NOTE

- Donor records are not impacted by Sample transfers
- New Participant records will be created in the destination Collection if one does not exist already
- Participant records will duplicate data from the previous Participant record, including linked Consent data
- Storage Locations will not change. Samples will continue to be assigned to the Storage Location they are currently in, even if the destination Collection does not have the access to place new Samples in that Storage Location
- The Oversight Officer will have access to several report options shown on the collection screen
- These can be used to view historic sample transfers in/out of the current collection

