



Creating a Collection Protocol in OpenSpecimen

What is a Collection Protocol?

A Collection Protocol is like a digital folder that organises all specimens for a specific Flinders research project or ethics-approved study. It includes key details like the project name, lead researcher, ethics approval reference, and specimen types.

There are two types of Collection Protocols:

- **Participant Centric CPs** follow individuals through their clinical journey, collecting specimens at defined events (e.g. Recruitment, Diagnosis, Birth, etc)
- **Specimen Centric CPs** manage specimens without linking to participant data.

For each Collection Protocol, the following information needs to be captured:

- Collection Protocol Name, Short Title and Description
- Associated Sites
- Principal Investigator and Coordinator(s)
- Collection Protocol Type (i.e. Participant or Specimen Centric)

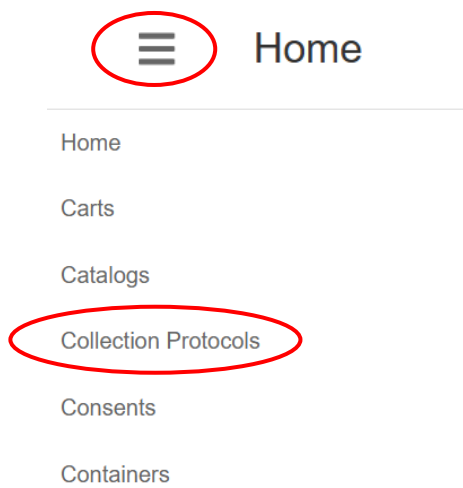
Other non-mandatory details can also be added in, if known:


- Study Start and End Date
- Ethics Approval Details
- Funding Sources
- Expected Participant Numbers
- SOP links
- Biosecurity Requirements

✦ Each specimen in OpenSpecimen must be linked to a Collection Protocol (CP), which defines how specimens are collected, processed, and stored.

How to Create a New Collection Protocol

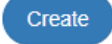
1. From the LHS Home Menu, navigate to **Collection Protocols**.




2. Select  Create at the top LHS of the screen.

3. Fill in the relevant details in the appropriate fields:

- **Site**
- **Title:** Full Study Name (e.g., "Vascular Disease Biobank").
- **Short Title:** Abbreviated name (e.g., "Vascular Biobank").
- **Principal Investigator**
- **Start Date:** Use the project commencement year.
- **IRB ID:** Ethics approval reference.
- **Type: Participant Centric or Specimen Centric:** Tick which box is appropriate to your study, from the two Collection Protocol types. A Participant Centric study tracks specimens across participant visits/events. A Specimen Centric study focuses on samples without linking to participant journeys.
- **Description of CP:** Brief study overview.

4. Once done, click .

 **Note:** Varying fields may be displayed based on how the Collection Protocol is configured and whether any custom fields have been added. If you require any extra fields to capture additional data, please put a message on the OpenSpecimen User Group Teams chat. A member of the OpenSpecimen Project Team will respond to your query within 24 hours.

Customise your Home Screen

Once you've created your Collection Protocol(s), you can pin them - or any other list views - to your Home screen. To do this, click the **Widgets** button located on the right-hand side of the Home screen.



Then select any of the **Widgets** you want displayed. You can also select the **Width** for each of the selected Widgets, depending on your view preferences.

Select Widgets...		
Widget	Width	
<input checked="" type="checkbox"/> Collection Protocols	4	▼
<input checked="" type="checkbox"/> Containers	2	▼
<input type="checkbox"/> Carts	2	▼
<input type="checkbox"/> Queries	2	▼
<input type="checkbox"/> Distribution Protocols	2	▼



Important Note About Your OpenSpecimen Environment

Please note that you've been defining Collection Protocols in the **OpenSpecimen Test environment**. When you're ready to transition to the **live Production environment**, you'll need to re-enter your Collection Protocols and specimen data there.

While we strongly encourage thorough testing and familiarisation in the Test environment, we recommend **not entering large volumes of data** if you're working with extensive collections or specimen sets. This will help minimise double handling and reduce the effort required when moving to Production.

Need Help?

Try the OpenSpecimen AI Help Tool to get quick answers, step-by-step guidance, and help navigating features like Collection Protocols.

Refer to the 'Using the AI Helpdesk Tool In OpenSpecimen User Guide' for instructions on how to set up the OpenSpecimen Helpdesk Tool.

If you have questions or need further assistance as you work through the Onboarding kit, please post your query as a chat in the *OpenSpecimen Onboarding Team page*.

A member of the OpenSpecimen Project Team will respond within 24 hours.