




Define Participant Requirements (for Participant Centric Collection Protocols)

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:

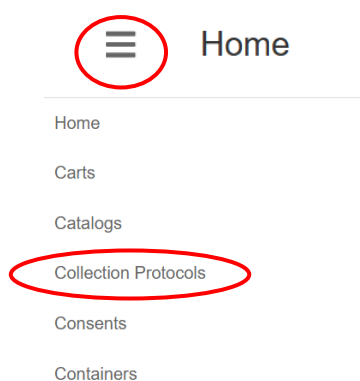
- **Participant Centric CPs** follow individuals through their clinical journey, collecting specimens at defined events (e.g. Recruitment, Diagnosis, Birth, etc)
- **Specimen Centric CPs** manage specimens without linking to participant data.

 **Note:** This process involves adding Events to a Participant-Centric Collection Protocol. Events and Specimen Requirements can also be added to a Specimen-Centric Collection Protocol when there are specific requirements tied to the specimens being collected.

How to Define Participant Requirements

Step 1: Add Events to your Collection Protocol

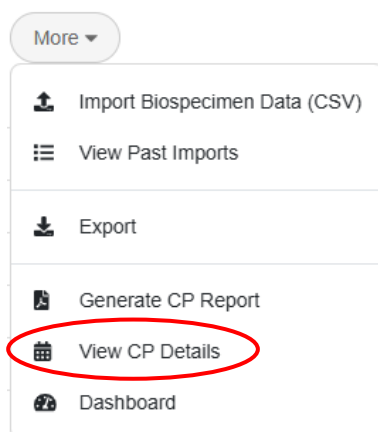
1. From the LHS Home Menu, navigate to **Collection Protocols**.



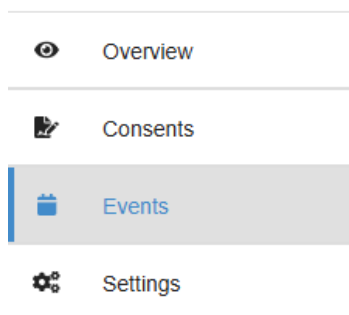
2. Select the **Participant Centric Collection Protocol** you previously created.

(Refer to [3.2 Create a Collection Protocol in OpenSpecimen.docx](#) for instructions on how to set up a CP)

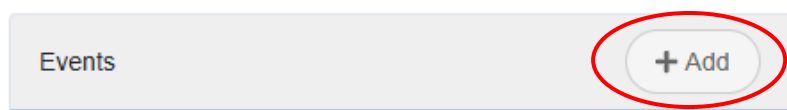
3. Click on **More**.
4. Click **View CP Details**.




5. Select the **Events** tab from the LHS menu.



6. Click **Add** next to Events.



7. Fill in the relevant details in the appropriate fields, including:
 - **Sites** (e.g., Flinders Medical Centre)
 - **Timepoints** (e.g., 12 weeks gestation)
 - **Event Label:** Name of the event (eg. T0D: Baseline (D0), Day 30 Blood Collection)
 - **Clinical Diagnosis**
8. Once done, click .

Step 2: Define requirements of Event

Once you have created the Event, you can click

+ Add Requirement

to define the requirements of the Event.

Categories of Event Requirements Types available for selection are as follows:

- Archaeological
- Cell (incl. Animal, Bacteria, Virus)
- Cell Line (incl. Animal)
- Fluid (incl. Animal)
- Molecular (incl. Animal)
- Other
- Reagent
- Tissue (incl. Animal)

Fill in the relevant details in the appropriate fields:

Name	<input type="text"/>
Code	<input type="text"/>
Type *	<input type="text" value=""/>
Anatomic Site *	<input type="text" value="Not Specified"/> X v
Laterality *	<input type="text" value="Not Specified"/> X v
Pathology Status *	<input type="text" value="Not Specified"/> X v
Quantity	<input type="text" value=""/>
Concentration	<input type="text" value=""/>
Sort Order	<input type="text"/>

Aliquots & Derivatives:

- Use **Create Derivative** for processed samples that are different from the parent specimen (e.g. A 10ml tube of whole blood is processed and derived into a 5ml tube of serum).
- Use **Create Aliquots** for same-type splits (e.g., A 5ml tube of serum is aliquoted into 5x 1ml tubes of serum).

Collection Protocols
Example Participant Centric CP

Overview
Consents
Events
Settings

Events + Add

- T0D: Baseline (D0)
- T31D: 1 Month (D30)
- T120D: Post Surgery Evaluation (D120)
- Cell Line

Specimen Requirements

Name

- > Whole Blood collected in Vacutainer Serum Separator (WB)
- > Whole Blood collected in Vacutainer Heparin (WB)

1. Define specimen classes (e.g., Cell, Fluid, Tissue)
2. Set collection procedures (e.g., blood, plasma, biopsy)
3. Define visit schedules if needed

Once an event has been setup with specimen requirements, a new participant can be created with the necessary specimens also being created. This can save time and ensure all the essential information is captured in the process.



Important Note About Your OpenSpecimen Environment

Please note that you've been defining Participant Requirements 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 and redefine Participant Requirements 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.