



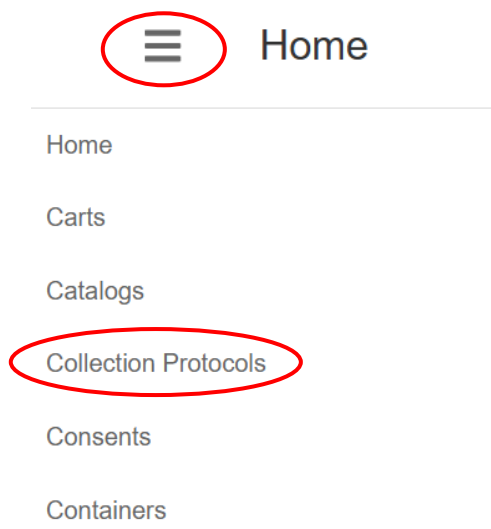
Manually Enter Participant Data into OpenSpecimen

This guide is designed for studies that involve recruiting participants and collecting specimens, using Participant-Centric Collection Protocols (CPs). These protocols require participants to be registered in the system before specimen data can be entered. This guide walks you through the process of manually entering data into OpenSpecimen.

How to Enter Participant Data

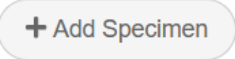

Step 1: Open the relevant Collection Protocol (CP)

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




2. Click on the **Collection Protocol** that matches your research project or ethics-approved study.


Step 2: Add a Participant


3. Inside the protocol, click . A data entry form will appear.
4. Fill in the relevant details in the appropriate fields:
 - **Registration Date*:** (Mandatory)
 - **PPID*:** This field will only appear if you have not setup auto-generated labels
 - **Registration Site:** Select from the drop-down list. Please advise the Project Team via a message on the OpenSpecimen User Group Teams Chat if you need a new site to be added to this list.
 - **External Participant ID:**
 - **Birth Date:** Select on the pop-up calendar or enter manually in format xx/xx/xxxx
 - **Master Patient Index (MPI):**
 - **Sex:** Select from the drop-down list.
 - **Vital Status:** Select from the drop-down list.
 - **Ethnicity:** Select from the drop-down list.
5. Once done, click .

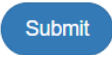
The 'Pending Visits' list for the new Participant will now appear, based on the events configured during the initial setup of the Collection Protocol.


 **Note:** You can either add Collection details for this participant now or come back later when it is time to complete the Event.



Step 3: Add Specimen Collection Details

6. Click  next to the relevant Event.


 **Note:** If your CP includes multiple visits, ensure you select the correct one before adding specimens.


7. Add in relevant details in fields provided. Then click . Specimens scheduled for collection will be displayed.

You can remove anything not required by clicking on the  to the LHS of the Description Line.

Description	Anatomic Site	Quantity	Location
  Cell Line - Not Specified	Fundus uteri	Cells (x10 ⁶)	

8. a) If you know where the Specimen is going for storage, you can add the Location now. You can either click on the Drop Down arrow and pick from the options listed.

Location 




- b) Or you can click on the Magnifying Glass to the RHS. Any Containers which have been configured as part of the Collection Protocol will load and be listed here.

Description	Anatomic Site	Quantity 	Location 
 Cell Line - Not Specified	Fundus uteri	Cells (x10 ⁶)	 

9. Once done, click



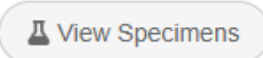
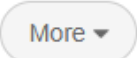
 **Note:** Prior to adding the participant, you can click on the "Proceed to Collection" button to also create any specimens associated with the participant.

10. Once the participant is added, you can find their record by entering their Participant Protocol ID (PPID) in the Search field at the top of the screen


or by **clicking** on their **PPID** in the **Collection Protocol** list.

 Collection Protocols / Example Participant Centric CP2


Participants

☐ Participant Protocol ID ↑↓

☐ 

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.

 **Tip:** Use consistent naming conventions (e.g. project codes, collection dates) to simplify tracking later.

Step 4: Save your Entry

11. Review your entries for accuracy.
12. Click **Save** or **Submit** to store the record(s) in OpenSpecimen.

Step 5: Repeat for Additional Participants

13. Follow the same steps to enter each new participant. You can add as many as needed.

Step 6: Review your Entries

After you click **Submit** to add a new record, you'll be taken to the *Participant List View* screen. From there, you can check that your newly added Participants appear correctly.

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.