

Submitting a Pick List or Testing List request through SmartSheet

This tutorial uses the IDCRC 21-0012 Mix N Match study for screenshots/examples. Each study has its own specific fields and options to select, drop down options and fields may vary based depending on the study that the list is requested for.

Note that all fields with “*” are required and must be entered in order to submit the form.

1. Use the link to open the form for the specific study in which the list is being requested
 - a. IDCRC 21-0004 MOMI-Vax: <https://app.smartsheet.com/b/form/cc7004f530da47aba22c9182538741ee>
 - b. IDCRC 21-0012 Mix N Match: <https://app.smartsheet.com/b/form/04244c0fe2994ff1b0ed75a3268d8eec>
 - c. IDCRC 20-0024 Mening Mali: TBD
2. Complete the form:
 - a. Protocol*: This field is pre-filled and does not need to be entered/amended

Protocol *

IDCRC 21-0012

- b. Request*: Follow the help text guidance to enter in the details of the request. This is how the request will be entered and displayed in the tracker.

Request *

Request Description: Please enter in this order: Cohort #, Group Description, Timepoint (Visit#) [example: Cohort 1, Group 1E, 2E, 3E Moderna boost at D1 (V1) and D29 (V4)]

Cohort 1, Groups 15E, 16E, 17E Novavax boosted at D1 (V1) D15 (V3) and D29 (V4)

- c. Request Type*: Use the drop down to select the type of request

Request type *

Select or enter value

Pick List
Testing List
Data Request
Secondary Research Pick List
Secondary Research Testing List
Secondary Research Data Request

- d. Requestor Name*: Enter the name of the person completing the form

Requestor Name *

Hannah Hale

- e. Requestor Email*: Enter the email of the person completing/requesting the form

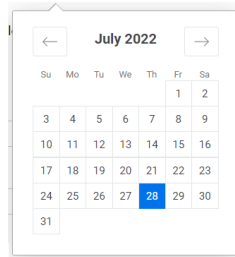
Requestor Email *

hhale@scharp.org

- f. **Request Date***: Either type the date or use the calendar function to enter the date the form is being completed

Request Date *

07/28/2022

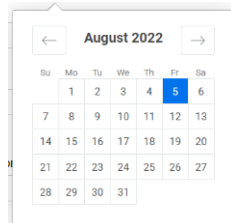


- g. **Due Date***: Enter the date expected to ship to Fisher by either typing the date or using the calendar function to select. *Note that the feasibility of completion by this requested date will be assessed by the Data Management Team

Due Date *

Note that the feasibility of completion by the requested date will be assessed by the Lab Data Management Team.

08/05/2022



- h. **Lab***: Use the drop down to select the lab where the samples will be shipped. If completing a secondary research request or a request for a lab that is not listed, select “Secondary Research – add name to notes”

Lab *

Select

- Montefiori
- McDermott
- Suthar
- McElrath
- Douek
- Cerba
- Secondary Research- Add name to notes

- i. **Assay***: Use the drop down arrow to select the assay(s) to be performed. Select all that apply. If the assay is not available in the drop down, the assay name may be typed in

Assay *

Select or enter value

- SARS-CoV-2 Live Neutralization Assay
- SARS-CoV-2 Pseudovirus Neutralization Assay
- N- Protein IgG ELISA
- B cell and innate responses
- Binding Antibody assay ECLIA V2.0 and 10-plex
- 27- color ICS
- FRNT-VeroE6-TMPRSS2

- j. **Assay Details***: Use this field to type in any additional details that may be needed. For example, the specific variant or antigen that is expected to be tested

Assay Details

Can be used to identify viruses or antigens expected to be tested

614G, Delta, Beta, Omicron

- k. **Cohort***: Use the drop down to select all that apply. If not listed, this field may be entered by typing in the value

Cohort *

Select or enter value ▼

1

2

- l. **Group(s) ***: Select all that apply from the drop down. If not listed, this field may be entered by typing the value. Note that not all groups show right away, you may need to scroll through the list to select some of the higher numbers

Group(s) *

Select or enter value ▼

1E

2E

3E

4E

5E

6E

7E

8E

9E

10E

11E

12E

13E

- m. **Vaccine***: Use the drop down to select all that apply

Vaccine *

Select ▼

Moderna

Janssen

Pfizer

Moderna 211 (variant)

Monderna 50mcg (low dose)

Novavax

- n. Specimen type*: Use the drop down to select all that apply. If not listed, this field may be entered by typing the value

Specimen Type *

- Serum
- PBMC
- Plasma

- o. Visit(s) *: Use the drop down to select all visits being requested. If not listed, this field may be entered by typing the value. Once a value is selected, it's removed from the list of options, and appears in the text box

Visit(s) *

- Visit 2/Day 8
- Visit 5/Day 91
- Visit 6/Day 181
- Visit 98/Day 273
- Visit 7/Day 366

- p. Vials Needed*: Type in the number of aliquots per timepoint and the volume requested

Vials needed *

Include count per timepoint and volume

- q. Participants expected on list*: Enter the number of participants that is expected to be available. *Note the number actually included on the final list/shipment may vary depending on availability

Participants expected on list *

Number actually included may vary depending on availability

- r. Total specimens expected on list: Calculate this value by taking the number of expected participants (q) times the number of vials needed (p) times the number of timepoints (o). It is not necessary to type out the numbers (67 x 1 x 3 = 201), simply typing 201 is sufficient.

Total specimens expected on list

(participants X number of aliquots per patient X number of timepoints)

- s. Additional requests/notes*: Include additional information that is not captured in the fields above. This may include pairs, subsets, etc. The field will be pre-filled with N/A, but this can be removed if additional information should be entered.

Additional requests/notes *

If not required, please indicate with "N/A"; include pairs, subsets etc. here

- t. Are planned analyses protocol defined*: Select answer from the drop down. If expected answer is not listed, this field may be completed by typing the answer

Are planned analyses protocol defined? *

Select or enter value ▼

Yes
No
N/A

- u. If not protocol defined, please explain: If No or N/A is selected for the above question, please enter a comment here. The field is prefilled with N/A, but can be removed if comment is required

If not protocol defined, please explain

If protocol defined, please fill with "N/A"

N/A

- v. LOU Notes: Use this field to enter any additional relevant information, including new lab names for secondary research.

LOU Notes

Enter any additional information, including new lab names, here.

- w. Send me a copy of my responses: Checking this box will send a copy of the rough draft of the list to the email entered in email address field that populates when the box is checked

Send me a copy of my responses

Email address

cposavad@fredhutch.org

- x. Submit the form by clicking on

3. After the form is submitted, a new blank form will populate. At the top of the new form, a confirmation icon should be present

✓ Success! We've captured your response. A Member of the LDM team will reach out if we have any questions regarding your request.

Protocol *

IDCRC 21-0012

4. Above that field, a link to the request list tracker can be used to see the progress of the list
Progress of this request can be tracked here:

<https://app.smartsheet.com/dashboards/4hf69VGHpC68g6f4vP9W63qfHfXvGFCCjPgGWR71>

5. Clicking the link will bring you to the LDM Request tracking form.
 - a. The form is broken down by Completed Requests at the top, and Pending requests towards the bottom. The request from the example in this tutorial can be seen in the red box below.

🕒 IDCRC 21-0012 LDM Request Tracking ☆

IDCRC 21-0012 LDM Request Tracking

IDCRC 21-0012 Complete requests									
Primary	Request Date	Date complete	Status	vaccine	Cohort	Group(s)	Visit(s)	Specimen Type	Assay
Lab Cerba									
Cerba Janssen N-protein 4E_5E_8E (D1, D91, D181) pick list	05/04/22	05/04/22	Complete	Janssen		1 4E 5E 8E	Visit 1/Day 1 Visit 5/Day 91 Visit 6/Day 181	Serum	N- Prote
Cerba Moderna N-Protein 1E_2E_3E (D1, D91, D181) Pick list	05/08/22	06/01/22	Complete	Moderna		1 1E 2E 3E	Visit 1/Day 1 Visit 5/Day 91 Visit 6/Day 181	Serum	N- Prote
Cerba Moderna Variant N-Protein 10E_11E (D1, D91, D181) Pick list	05/08/22	05/25/22	Complete	Moderna 211 (variant)		1 10E 11E	Visit 1/Day 1 Visit 5/Day 91 Visit 6/Day 181	Serum	N- Prote
Cerba Moderna low dose N-Protein 12E_13E_14E (D1, D91, D181) Pick list	05/08/22	05/18/22	Complete	Moderna 50mcg (low dose)		1 12E 13E 14E	Visit 1/Day 1 Visit 5/Day 91 Visit 6/Day 181	Serum	N- Prote
Cohort 1, Group 15E, 16E, 17E Novavax boost at D1 (V1)	07/08/22	07/20/22	Complete	Novavax		1 15E 16E 17E	Visit 1/Day 1	Serum	N- Prote
Cerba Pfizer N-Protein 7E_8E_9E (D1, D91, D181) pick list	05/09/22	05/11/22	Complete	Pfizer		1 7E 8E 9E	Visit 1/Day 1 Visit 5/Day 91 Visit 6/Day 181	Serum	N- Prote

IDCRC 21-0012 Pending requests									
Primary	Request Date	Date complete	Status	vaccine	Cohort	Group(s)	Visit(s)	Specimen Type	Assay
Lab Douek									
Douek- Novavax-VOC 15E_16E_17E D1, D15	06/09/22		Pending	Novavax		1 15E 16E 17E	Visit 1/Day 1 Visit 3/Day 15	PBMC	B cell and ir
Lab McDermott									
Cohort 1, Groups 15E, 16E, 17E Novavax boosted at D1 (V1) D15 (V3) and D29 (V4)	07/28/22		New	Novavax		1 15E 16E 17E	Visit 1/Day 1 Visit 4/Day 29	Serum	N- Protein Ig
Lab Montefiori									
Montefiori- VOC			Pending	Moderna 50mcg (low dose)		12E 13E 14E	Visit 4/Day 29 4	Serum	SARS-CoV-
Lab Suthar									
Suthar	01/21/22		Pending	Moderna		1 1E 2E 3E	Visit 6/Day 181	Serum	SARS-CoV-

- b. All the information entered on the request form is visible in the Request Tracker. You may need to scroll down, or to the right to see all the values, but they should all be there.
6. When Lab Data Management has reviewed and approved the request, the Status will change from “New” to “Pending” and when it has been completed by LDM, will change to “Complete” and move to the top of the Tracking document into Complete Requests.
 - a. Some requests result in “stragglers” that are not included in the first shipment to Fisher but will be included at a later time. In this case, LDM will update the Status of the report to “Pending – Stragglers”
 - b. If for some reason the list will not be completed by LDM, the status will be updated to “Will not be completed”