

# **Stem Cells National Systems Solutions User Manual Section 16: Canadian Transplant Centres**

Revision 4 Reissue #1

Legacy Doc Number 15 701

## Revision History

Version	Detail
3 Amendment 12	CR#19043 – SCNSS Release Feb 27, 2022 - Automate Process for Updating Patient Status to Stopped status with Reason: No Activity in the last 6 Months CR 19124 Stem Cell Registry Canadian Transplant and Collection Centre Updates – new reports, patient status date, collection centre schedule updates
3 Amendment 13	CR 19306 Stem cell registry and cord blood bank extended HLA updates
1 = 3 Amendment 14	CR 19547 / StCR-22-000057 - High Complexity: SCNSS – Entrust Replacement for SCNSS External users
Revision 2	CR StCR-220000421 – Stem Cells – Registry On Call Telephone Number Change
Revision 3	StCR-23-000586 SCNSS Release – WMDA Match Connect related changes StCR-23-000697 Difficult Search Review Enhancements
Revision 4 Reissue #1	StCR-24-000030 HLA discrepancy identification at VT

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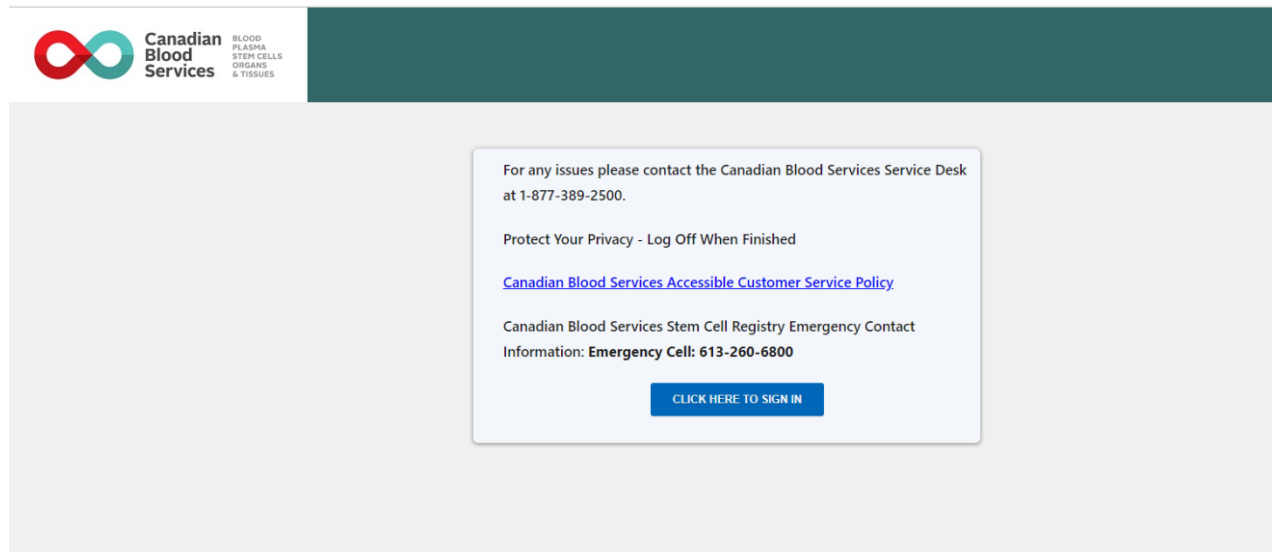
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## 1 Stem Cells National Systems Solutions (SCNSS) Basics

### 1.1 Logging into the Stem Cells National Systems Solutions (SCNSS)

- 1) Open a Chrome browser.
- 2) Type <https://scnss.blood.ca> in the address field.



- 3) Click on the button titled “CLICK HERE TO SIGN IN”.
- 4) At The Sign In screen, enter your windows account user name (provided by Canadian Blood Services – example: Donald.Duck@blood.ca), Select Next
- 5) Enter your password, select Sign In.
- 6) If you are a Canadian Transplant Centre(CTC) and Collection Centre (CC) user, a window will appear with both roles listed. Select the ‘CTC’ role.

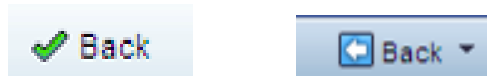
### 1.2 Using “Back” buttons

Never use the browser “Back” button. This will close your SAP session. If you do accidentally hit the browser “Back” button, just log in again.

Always hitting the wrong back button? Click the F11 key to remove the browser tool bar. To bring it back, just click the F11 Key again.



The SAP back buttons, shown below, should be used when you want to return to a previous screen.



### 1.3 Error messages

Stem Cells National Systems Solutions (SCNSS) uses the upper right hand corner of the screen to display messages. The message will appear as a coloured symbol and a number to indicate the number of messages.



Green checkmark – The transaction is saved and no information is missing.

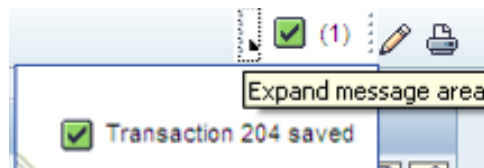


Yellow yield– the transaction is saved but some information is missing.



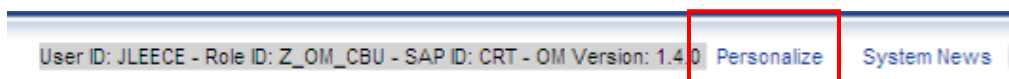
Red Stop sign– Critical information is missing in order to proceed.

By expanding this area, you can read what the message is.

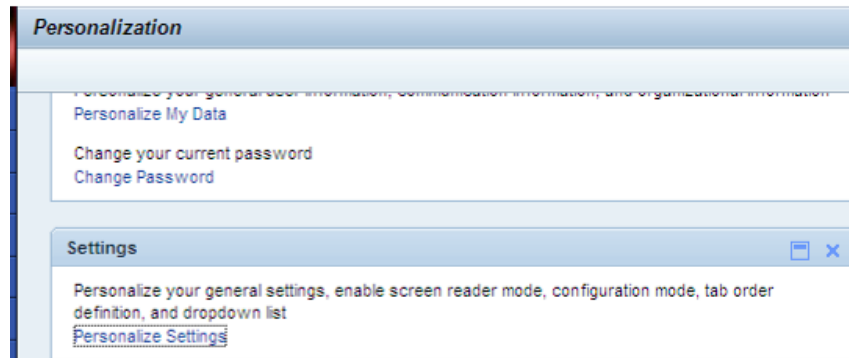


To set the the message to appear without expanding it each time:

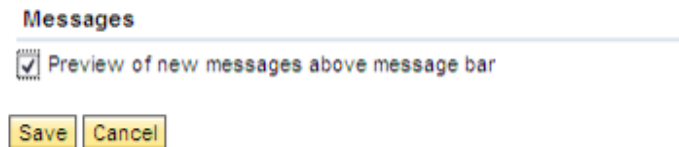
- a. Click on the “Personalize” button.



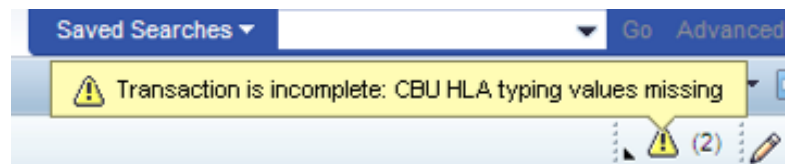
- b. In the ‘Settings’ section of the personalization screen, click on the “Personalize Settings” link.



- c. In the Message area, click the box ‘Preview of new messages above message bar’.



- d. Click save. Messages will now appear automatically, but only show for a short time before disappearing from the screen.

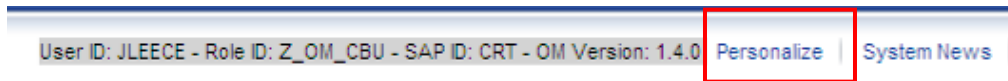




### 1.4 Modifying Recent Items list

The recent items section of CRM is default to display the last 5 transactions that were viewed. This number can be expanded up to 25 items.

- 1) Click on the “Personalize” button.

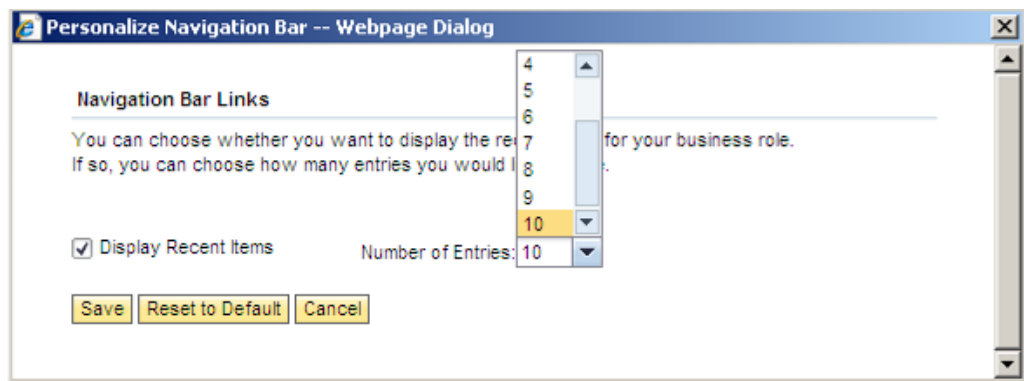


- 2) Click on “Personalize Navigation Links”.

Personalize your recent items, quick creates, and other link groups

Personalize Navigation Links

- 3) The ‘Navigation Bar’ window will appear. Select the desired “Number of Entries”.



- 4) Click “Save”. The ‘Recent Items’ will now display the new number of items.



### 1.5 Opening links

To open a window, link or transaction, click on the **blue** text.

CBU Mother	Tara Stemcell	CAR1000364005	/ T1P 1H7
Cord Blood Unit	CBU CAC1000364006	C064313000114	Not available /

### 1.6 Date format

When entering a date, the format to use is:

**yyyy/mm/dd or 2013/01/14**

**Note: Stem Cells National Systems Solution (SCNSS) does not accept the use of “-” dashes in the date format.**

### 1.7 Search screen options

There are several ways a user can search for a patient. The more information entered the faster the search will be, but the chance for entry error increases. Entering too little information can open the search up to many more possibilities, but the search will take more time. The user has to find a balance that works.

Each field has a qualifier. This tells the system how to use the information entered to complete the search. Each field has a drop down box on the qualifier with 1 or several options to choose from. The most common ones are: “is”, “contains” and “starts with”.

The screenshot shows a 'Search Criteria' form with five rows of search fields. Each row consists of a field name dropdown, a qualifier dropdown, and a text input box. The 'Last Name' row has a yellow highlight on the 'is' option in the qualifier dropdown. To the right of each input box are '+' and '-' buttons.

Field Name	Qualifier	Input Box
Identification Number	is	
First Name	is	
Last Name	is	
Date of Birth	contains	
Postal Code	is	

For example, to search for Susie Stemcell:

Search Field	Qualifier	Type	
First name	is	Susie	This options searches for exactly what you typed only.
	is	Sus*	The open the search to include other info besides what you typed a wildcard or “*” is needed.
	contains	usi	This option is like having built in wildcards in the front and end of what you type.
	Starts with	Sus	This option is like having a built in wildcard at the end of what you type only.

### 1.8 Editing information

Some information can be edited within the system after it has been saved.

- 1) To enable ‘Edit mode’ click on the “Edit” button on a tab or section.



- 2) Information that is in white boxes can be changed and information contained in blue shaded boxes cannot be changed.

**General Data**

Patient ID:	CAP7000014917
CRM ID:	7000014917
CTC Owner:	Sinclair Tudor
PTLS Owner:	
* CTC:	TC-Vancouver General Hospital
* First name:	Randy
* Last name:	Stemcell
* Date of Birth:	1977/02/02

- 3) Click “Save” when changes are complete.
- 4) If critical fields were edited, a confirmation window will appear to confirm the information. Click “OK” if the information is correct or “Cancel” to make changes.

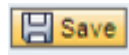
### 1.9 Saving a search

When a standard search is used routinely, it can be saved for ease of use.

- 1) Enter the search criteria.
- 2) Click “Search”.
- 3) In the ‘Save Search As’ field, enter the name the search is to be saved as.



- 4) Click the “Save” button.

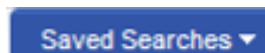


- 5) The saved search will appear in the ‘Saved Searches’ section at the top of the screen.



To open a saved search:

- 1) Click “Saved Searches” button at the top of the search screen if the searches do not appear.



- 2) If more than one search was saved, select the search to run.
- 3) Click the “Go” button.



- 4) The search results will appear.

Result List: 13 Accounts Found

OneMatch Patient	Patient ID	First Name	Last Name	Ethnicity	Date of Birth	Country	CTC/IR	Patient Status	Created on
	CAP7000018331	Alexander	[REDACTED]	Caucasian	1982/07/28	CA	TC-Vancouver General Ho...	Active	2019/12/02
	CAP7000019551	Charles	[REDACTED]	Caucasian	1953/11/16	CA	TC-Vancouver General Ho...	Active	2020/06/29
	CAP7000016992	Charlotte	[REDACTED]	First Nations	1990/05/15	CA	TC-Vancouver General Ho...	Active	2019/04/09
	CAP7000018962	Corrina	[REDACTED]	Caucasian	1977/01/28	CA	TC-Vancouver General Ho...	Active	2020/03/17
	CAP7000018236	David	[REDACTED]	Caucasian	1956/07/24	CA	TC-Vancouver General Ho...	Active	2019/11/22
	CAP41644	Joel	[REDACTED]	Caucasian	1991/02/14	CA	TC-Vancouver General Ho...	Active	2014/06/19
	CAP7000016504	Karen	[REDACTED]	Caucasian	1956/01/17	CA	TC-Vancouver General Ho...	Active	2019/01/23
	CAP7000018546	Loren	[REDACTED]	Caucasian	1950/03/19	CA	TC-Vancouver General Ho...	Active	2020/01/30
	CAP7000018392	Lorlee	[REDACTED]	Filipino	1981/05/08	CA	TC-Vancouver General Ho...	Active	2019/12/16

◀ Back 1 2 Forward ▶

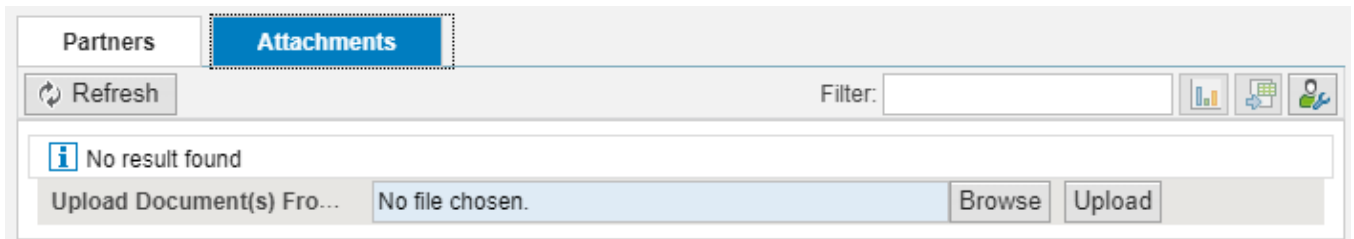
- 5) To return to the standard search view, click the “Back” button.
- 6) To delete a search, click the ‘delete’ button beside the search name.



### 1.10 Attachments

Attachments can be done on profiles, transactions or tasks and are organized under an “Attachments tab”.

The tab may look different depending on where the attachment is found, but functions the same way. You may add one or many attachments at the same time.

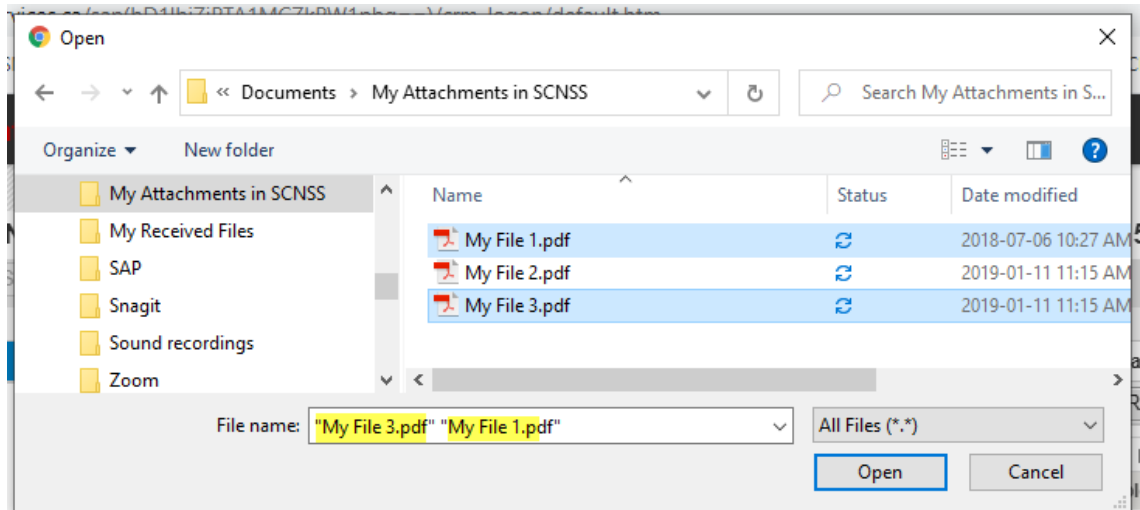


Use the Browse button to select your document(s).

**Note: Files cannot be added to a specific folder when using the “Browse” button.**

#### 1.10.1 Creating an attachment

- 1) Click on the ‘Attachment’ tab.
- 2) Click the “Browse” button and find and select the file (or multiple files).




3) Click “Open”.

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you do not enter a name, the file name is displayed.

Upload Document From Local Hard Disk

Upload Document(s) From Local Hard Disk: C:\fakepath\Conversion pre-reqs.docx





**Note: For multiple files, don't worry that only one filename will appear in the pathname -- all selected files will still be uploaded.**

4) Click “Attach”.

5) The attachment will now appear in the ‘Attachments’ tab.

Partners **Attachments**

Filter:

Actions	File Name	Created By	Created On
	My File 3.pdf	TSTCTC	2021/04/30 10:46
	My File 1.pdf	TSTCTC	2021/04/30 10:46

Upload Document(s) From... No file chosen.

6) To open an attachment once it is added to the system, click on the name.

7) If no automated task is created, notify the registry by sending a follow-up task.

### 1.10.2 Deleting an attachment

Attachments can only be deleted by the user who attached them. To delete an attachment, click on the garbage pail beside the attachment properties.



### 1.11 Follow up task

Follow up tasks are used to communicate with the registry, for example: to inform the registry when new documents are attached.

#### 1.11.1 Sending a Follow up task

- 1) Click on the “Follow up task” button.
- 2) The follow up task screen will appear. Select the group the follow up task should be assigned to in the “Reason’ field.

The screenshot shows the 'Task Details' form with the 'Reason' dropdown menu open. The 'Reason' field is currently set to 'New'. The dropdown menu lists three options: 'Follow-Up Task – Activation Team', 'Follow-Up Task – Case Managers' (which is highlighted in yellow), and 'Follow-Up Task – Search Analysts'. The 'General Data' section includes fields for Task ID, Created On (2014/05/09), Due Date (2014/05/14), Status (New), and Reason.\*

- 3) In the description field, enter the details of the follow up task.

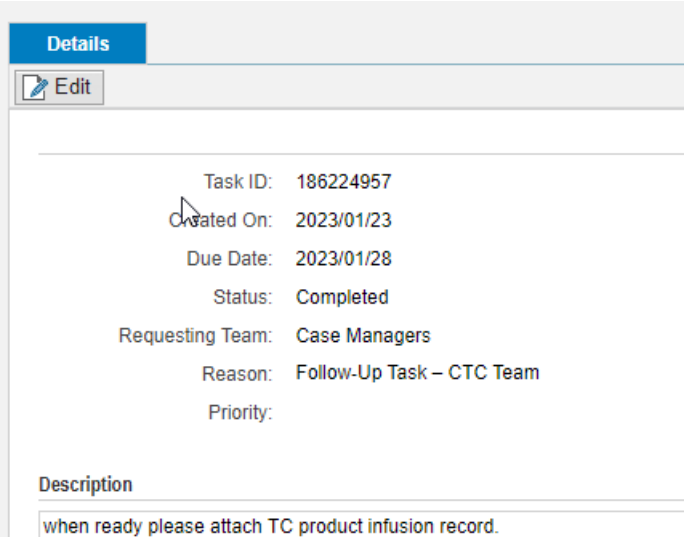
The screenshot shows the 'Follow-Up Task: New' form. The 'Reason' dropdown menu is open, showing the same three options as in the previous screenshot, with 'Follow-Up Task – Case Managers' highlighted. The 'Description' field contains the text 'Please follow up on activation xyz'. To the right, there is a table titled 'Partners' with columns for Partner Function, Partner Name, ID, and Other ID. The table contains three rows of data.

Partner Function	Partner Name	ID	Other ID
CTC/IR	VANCOUVER GENE ...		
Patient	Charles Boyle	CAP7000019551	CAP7000019551
Registrant/CBU		5019 0000 0000 2526 516	AM25265D

- 4) Click “Save and Back”.

### 1.11.2 Receiving a Follow up task

- 1) Receive task “Follow-Up Task – CTC Team”.
- 2) Assign and open task.
- 3) Review the information in the description field.



The screenshot shows a 'Details' view of a task. At the top, there is a blue 'Details' tab and an 'Edit' button with a pencil icon. Below this, the task information is displayed in a list format:

- Task ID: 186224957
- Created On: 2023/01/23
- Due Date: 2023/01/28
- Status: Completed
- Requesting Team: Case Managers
- Reason: Follow-Up Task – CTC Team
- Priority:

Below the list is a 'Description' field with the text: "when ready please attach TC product infusion record."

- 4) Set task to completed.



### 1.11.3 Re-assigning a Follow-Up Task

- 1) Stem Cells National Systems Solutions (SCNSS) allows the re-assignment of a Follow-up task. Re-assignment can be done on a Follow-Up Task in ANY Status.
- 2) To re-assign a Follow-Up task, simply edit the task, and change the Reason to reflect the new team the Follow-Up task should be assigned to. Save the change.

**Note: Follow-Up tasks that have been assigned/reassigned to a Canadian Transplant Centre (CTC) role, can be assigned to any registry team member, but subsequent reassignments by the registry assignee will be restricted to the Canadian Transplant Centre (CTC) Requesting team. Do not Cancel or Complete the task after re-assigning – by doing so, the task will NOT appear on the new assignees Worklist**

The screenshot shows the 'Task Details' form in a web application. The form has a blue header with the text 'Task Details' and an 'Edit' button. Below the header is a section titled 'General Data' containing several fields: 'Task ID' (24451327), 'Created On' (2015/09/17), 'Due Date' (2015/09/22), 'Status' (New), 'Requesting Team' (CTC Team), and 'Reason' (Follow-Up Task - Case Mana). The 'Reason' field is currently open, showing a dropdown menu with three options: 'Follow-Up Task - Activation Team', 'Follow-Up Task - Case Managers' (which is highlighted in blue), and 'Follow-Up Task - Search Analysts'. Below the 'Reason' field is a 'Priority' field and a 'Description' section.

**1.11.4 Urgent Follow-Up Tasks**

- 1) Stem Cells National Systems Solutions (SCNSS) allows the user to set a Follow-Up Task to have an “Urgent” priority

**Follow-Up Task: 24452141, Patient: CAP70**

Save and Back Save Cancel Edit

**Details**

Edit

**General Data**

Task ID: 24452141

Created On: 2015/09/18

Due Date: 2015/09/23

Status: New

Requesting Team: Case Managers

\* Reason: Follow-Up Task - Search Anal

Priority: Urgent

Description

- 2) Urgent Follow-Up tasks will display in RED highlighting on the Worklist view.

Node	Due On	Task ID	Reason	Status
▶	2015/09/23	24452138	Follow-Up Task - Search Analysts	New
▶	2015/09/23	24452135	Follow-Up Task - Search Analysts	New

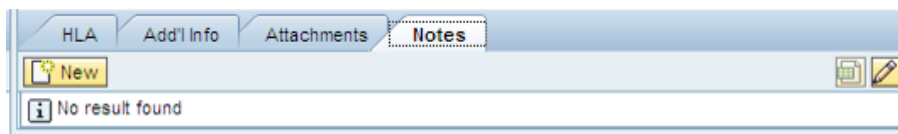
- 3) If an Urgent Follow-Up task is issued to a Canadian Transplant Centre (CTC), an email will be immediately issued to each user of the assigned Canadian Transplant Centre (CTC) with the Subject “SCNSS Urgent task”.

### 1.11.5 Patient – No activity in the last 6 mths

- 1) This task will be issued to the Canadian Transplant Centre (CTC) notifying them the patient search has been set to status ‘STP’ with reason of ‘no activity in the last 6 months’. This task will only be generated when the background monitoring program sets this status; it will not be generated if a user selects this status and reason.

### 1.12 Notes

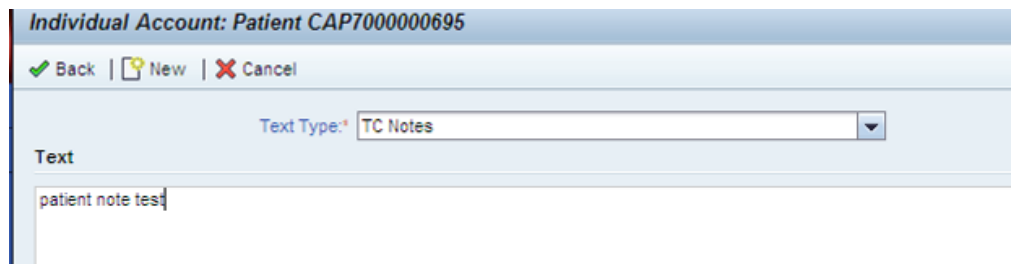
- 1) Click on the ‘Notes’ tab.



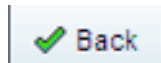
- 2) Click the “New” button.



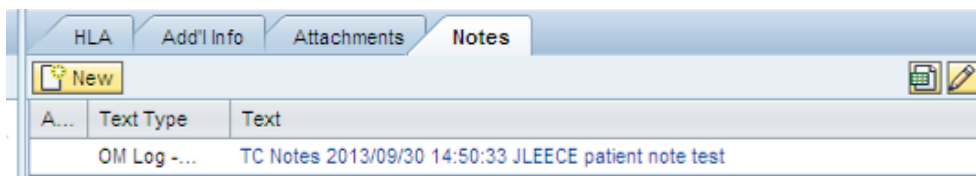
- 3) Enter the note in the ‘Text’ field.



- 4) Click the “Back” button.



- 5) Click “Save”.

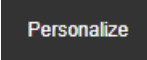


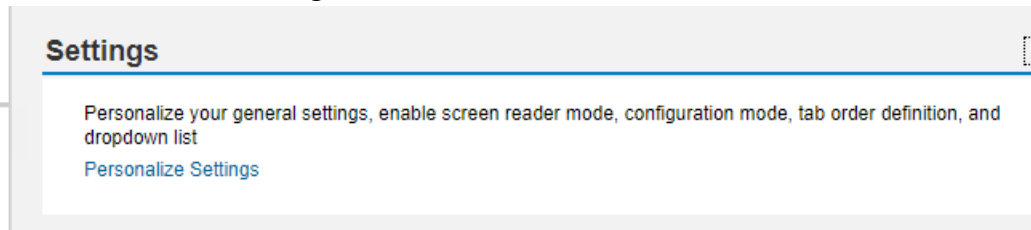
- 6) To view any note that is saved, click on the blue text of the note. This will open the log and all text will be viewable.

**Note: Notes are not able to be deleted once they have been saved.**

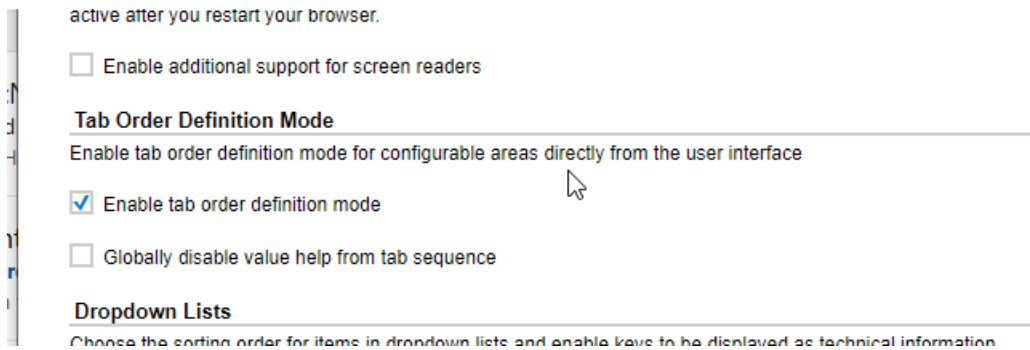
### 1.13 Changing tab order

Tabbing order of fields in a screen can be personalized as desired.

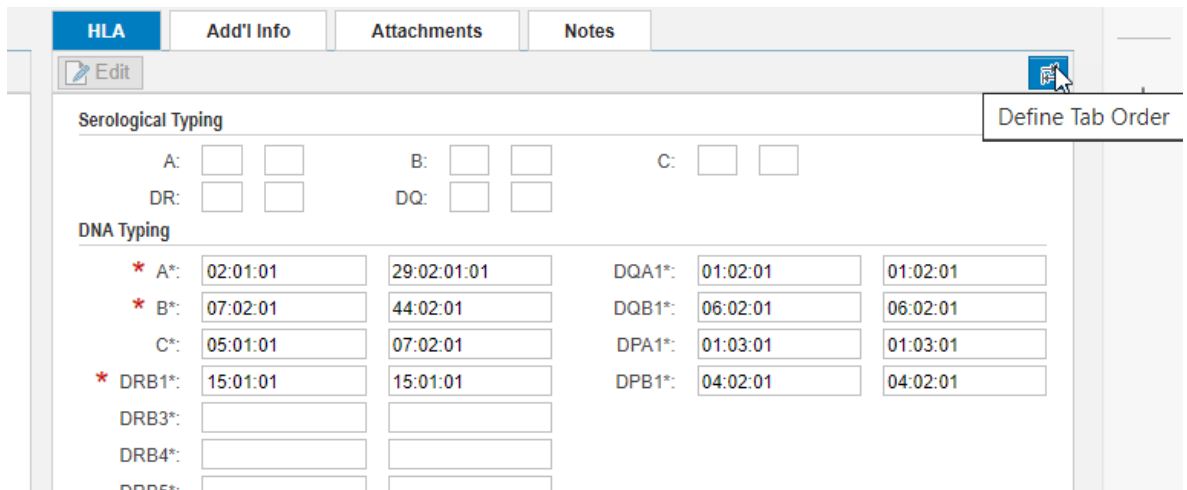
- 1) Click 'Personalize' at top of the screen. 
- 2) Click 'Personalize Settings'.



- 3) Select 'Enable tab order definition mode' and then click 'Save'.



- 4) Click 'Edit' in a screen where tab order is to be personalized and click 'Define Tab Order'.



5) Indicate the desired tab order in the applicable fields and then click 'Save'.




The screenshot shows a web interface for HLA typing. At the top, there are four tabs: 'HLA' (selected), 'Add'l Info', 'Attachments', and 'Notes'. Below the tabs are three buttons: 'Save', 'Reset', and 'Cancel'. The main content area is divided into two sections: 'Serological Typing' and 'DNA Typing'.  
The 'Serological Typing' section has three columns for A, B, and C. Each column has two input boxes. Below these are two rows for DR and DQ, each with two input boxes.  
The 'DNA Typing' section has two columns of input boxes. The first column has rows for A\*, B\*, C\*, DRB1\*, DRB3\*, DRB4\*, and DRB5\*. The second column has rows for DQA1\*, DQB1\*, DPA1\*, and DPB1\*. The DRB1\* field in the first column contains the number '8' and is highlighted with a dashed border.


### 1.14 Worklist





When a user first logs into CRM, the home screen is the Worklist Page. This page shows all the tasks that are new or in process and assigned to that user's group.

Searches can be done using a variety of criteria – reasons, status, dates, etc.




Each uncompleted task on the worklist, is color coded to show at a glance how the task proceeding compared to its due date.

-  Task is overdue.
-  Task is coming up to its due date.
-  Task is on target.

To view the related transaction, click on the arrow  to expand the task line.

		2013/02/03	9936222	Misc Sample – Issue Sample	In Process	C
			8000001205	CBU Misc. Sample	In Process	C

Urgent Tasks will be highlighted in RED.

Node	Due On	Task ID	Reason	Status	F
 	 2015/09/23	24452138	Follow-Up Task – Search Analysts	New	C

### 1.14.1 Notification of unacknowledged tasks

An email will be sent each workday, such as the example below, to notify the user if there are any unacknowledged tasks.

***Subject:** SCNSS Unacknowledged Tasks (CTC)*

*This is to advise you that there are **1** new tasks assigned to your facility.*

*Should you have any questions, please email [cbs.stemcellregistry@blood.ca](mailto:cbs.stemcellregistry@blood.ca)*

*Thank you.*

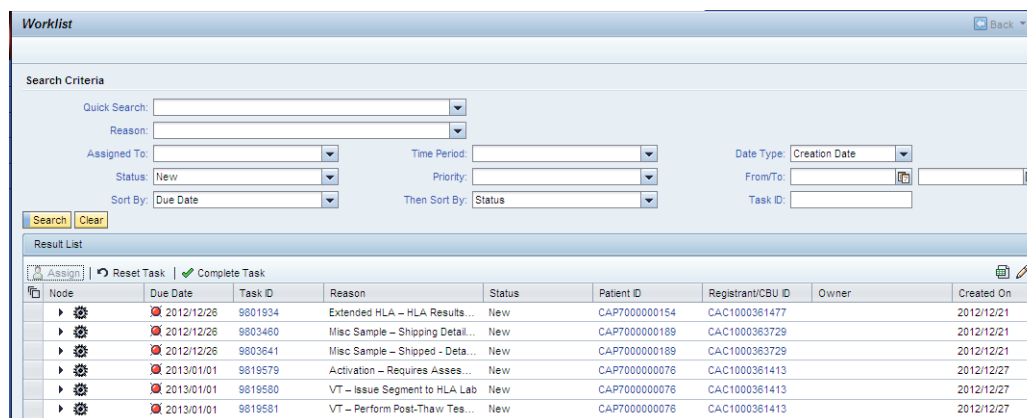
*The Canadian Blood Services Stem Cell Registry Team.*

### 1.14.2 Assigning a task

\*\*\*It is Important to ensure a task is assigned to yourself before working on it. Current ownership of a task can be seen in the ‘Owner’ column of the worklist search results or the ‘Owner’ identification within the Partners tab of the task. The system does not assign/reassign the task to a user even if he/she does work in it. \*\*\*

Worklist has an action button ‘Assign’ which will, for selected ‘New’ tasks, automatically assign the ‘Owner’ and set the task status to ‘In Process’. This is proposed for use in the instructions within this manual even if ownership is previously assigned to the task as the simplest method of performing both actions. Optionally, the same actions can be performed as follows: open the task; click ‘Assign Owner’ if assignment or reassignment of the current ‘Owner’ is required; modify the status to ‘In Process’; and Save.

- 1) In the Status section, select “New” from the drop down box.
- 2) The new tasks which have not been assigned will appear in the results area.



For registrants, the ‘Registrant/CBU ID’ column will display the Global Registration Identifier for Donors (GRID) (if known) or the original registrant identifier.

**Result List: 1 Item Found**

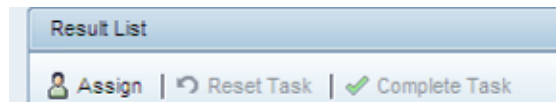
Assign | Reset Task | Complete Task

Node	Due On	Task ID	Reason	Status	Patient ID	Registrant/CBU ID	Owner	Created On
	2019/05/07	3050...	Follow-Up Task – CTC Team	In Process	CAP7000000963	3458 000T WDON 0NEW 113	GS - Ricky Ratios	2019/05/02

TW-DON-NEW-1

**Note:** Hovering over the ‘GRID’ identifier in the ‘Registrant/CBU ID’ field on a particular entry within the Worklist will display its original registrant identifier (if it’s available).

- Highlight the task you wish to assign. This can be done by clicking on the far left box on the line. (You do not want to open it.)
- Click on the “Assign” button located in the top left of the Results List.



- The Task will now have your name as the Owner of the Task and the Status will be changed to “In progress”. The task will now appear in your Worklist.

Work-Up – Issue Segment to...	New		CAP7000000186	CAC1000363723		2013/01/04
Work-Up – Shipping Details A...	New		CAP7000000186	CAC1000363723		2013/01/04
VT – Perform Post-Thaw Tes...	In Process		CAP7000000178	CAC1000363728	Jody Leece	2013/01/04

### 1.14.3 Assign someone else as owner

Once a task or activation has an owner assigned, it can be reassigned to another owner.

- Open the task/ activation.
- Click the “Assign Owner” button, if an owner has not already been assigned.



- Click “Edit” in the ‘Partners’ tab.

Partners | Attachments

Edit List

Propose Alternatives

Partner Function	Partner Name
Assigned Team	Case Managers
Owner	Sandra Halliday



- 4) Click the white box beside the current owner's name.



- 5) Enter the new owner name in the search fields.

**Search Criteria**

First Name	starts with	Yiming	+	-
Last Name	is	Guo	+	-
User	is		+	-

Maximum Number of Results: 100

- 6) Click "Search".  
7) Select the new owner from the search results.

**Result List: 1 Employee Found**

Last Name	First Name	User Name
Guo	Yiming	TSTCBUSA

- 8) The new owner name will appear in the 'Partner' tab.

**Partners** Attachments

Edit List

Propose Alternatives

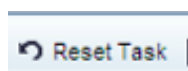
Partner Function	Partner Name
Assigned Team	Case Managers
Owner	Yiming Guo

- 9) Click "Save".

### 1.14.4 Resetting a task

A task can have its status reset to “New” when it has been put into “In Process” by the following process. This may also remove the ‘Owner’ of the task and a new owner will need to be reassigned.

- 1) Open the worklist.
- 2) Highlight the task that needs to be reset.
- 3) Click on the “Reset Task” button located in the top left corner of the result list.



- 4) The task status will change back to ‘New’ and no owner will be assigned to the task. The task is now ready to be assigned to another owner.

Task ID	Reason	Status	Patient ID	Registrant/CBU ID	Owner	Created On
9850140	VT – Perform Post-Thaw Tes...	New	CAP7000000178	CAC1000363728		2013/01/04

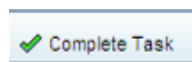
### 1.14.5 Completing a task

A task can be marked completed in a couple of ways: in the task screen or directly from the worklist.

**Note: Some tasks cannot be completed until the required information is entered into the task.**

#### Completing task from worklist

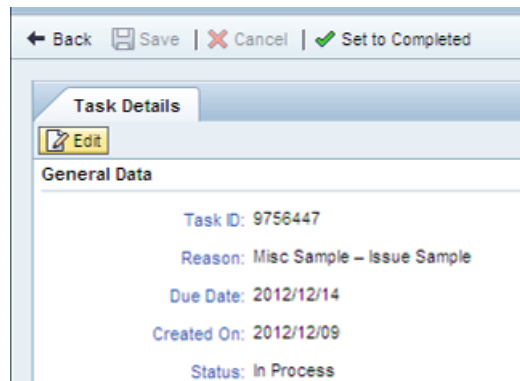
- 1) Open the worklist.
- 2) Highlight the task that needs to be marked completed.
- 3) Click on the “Complete Task” button located in the top left corner of the result list.



- 4) The task status will change to completed.

**Completing task from task screen**

- 1) Open the task.
- 2) Click on the “Set to Completed” button.



- 3) The task status will change to completed.

**1.14.6 Viewing the Task Description from the Worklist**

- 1) As is shown below, placing the mouse over the Reason field on a particular task within the Worklist will display the task Description field if it is not blank.

Result List: 1 Item Found

Assign | Reset Task | Complete Task

Node	Due Date	Task ID	Reason	Status	Patient ID
	2015/05/17	11809947	Follow-Up Task – CTC Team	New	CAP7000007782

This is the content of the description field for this task.

**Note:** For Follow-Up Tasks, the hover over functionality is also available from under the Related Transactions tab of parent Stem Cells National Systems Solutions (SCNSS) transactions.

### 1.14.7 Producing Canadian Transplant Centre Work-up Overview Report


To produce a report of all active work-ups that your Canadian Transplant Centre is assigned to:

- 1) From Worklist, click ‘CTC Work-up Overview’.
- 2) A PDF report will be generated showing the In Process, On Hold, Fulfilled work-ups where the CTC/IR partner is the user’s Transplant Centre. Work-ups will be presented segregated into 4 sections: International Registrant work-ups, Canadian Registrant work-ups, International CBU work-ups and Canadian CBU work-ups. Within each section, the work-ups are presented in ascending order by Work-up ID.

### 1.15 Printing

In order to print from within the Stems Cells National Systems Solutions (SCNSS) application, perform the following steps:



- 1) Use the SCNSS 'Print' icon  to prepare the form
- 2) Ctrl-P to activate the browser printing menu function
- 3) Select a PDF generating tool or a normal printer from the list.
- 4) Adjust print settings as desired and then click on the action button of the print menu.
- 5) The screen will be saved to PDF or Printed.


### 1.16 Partners

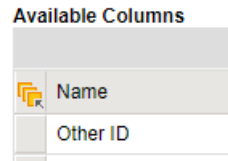
‘Partners’ tab displays information about business partners, with their applicable identifiers, related to the transaction (eHLA, work-up, task, etc.).


- 1) Click on the ‘Partners’ tab of the transaction.

Partner Function	Partner Name	ID
CTC/IR	VANCOUVER GENERAL, GORDON AND	
Patient	C [REDACTED] le	CAP7000019551
Registrant/CBU		5019 0000 0000 2526 516
Registry/CBB	ARMENIAN BONE MARROW DONOR R...	
Requester	Charlie Ha	
Ship-To Party	CBS c/o Vancouver General Hospital	

By default, only the identifiers appearing in the ‘ID’ column will be displayed.

- 2) Click on “Personalize” icon  to customize the ‘Partners’ tab view.
- 3) From the list of ‘Available Columns’ at left, select the ‘Other ID’.



- 4) Click on “Move to Right” icon  to move the selected column to the list of ‘Displayed Columns’ at right.

Name	Width	Fix Col...	Filter C...
Partner Function	10%		
Partner Name	20%		
ID	15%		
Other ID	15%		

- 5) Click “Save”.



After that, all ‘Partners’ tabs for this transaction type will display both the ‘GRID’ (if assigned) and the original registrant identifiers.

Partner Function	Partner Name	ID	Other ID
CTC/IR	VANCOUVER GENERAL, GORDON AND		
Patient	Charles Boyle	CAP7000019551	CAP7000019551
Registrant/CBU		5019 0000 0000 2526 516	AM25265D
Registry/CBB	ARMENIAN BONE MARROW DONOR R...		
Requester	Charlie Ha		
Ship-To Party	CBS c/o Vancouver General Hospital		

**Note:** For a different transaction type (e.g. eHLA, VT, Reservation, Follow-up task, etc.), the above steps should be repeated.

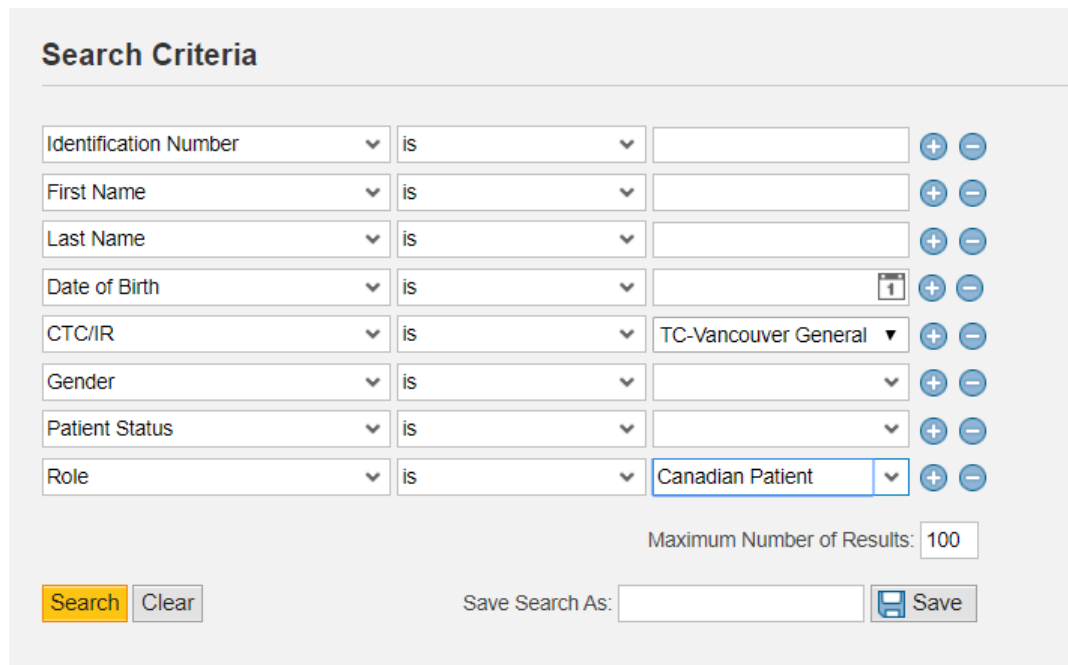
## 2 Patient profile

### 2.1 Searching for a patient profile

- 1) Click on the “Patients” tab.



- 2) The patient search screen will open.



**Search Criteria**

Identification Number	is		+ -
First Name	is		+ -
Last Name	is		+ -
Date of Birth	is		+ -
CTC/IR	is	TC-Vancouver General	+ -
Gender	is		+ -
Patient Status	is		+ -
Role	is	Canadian Patient	+ -

Maximum Number of Results: 100

Search Clear Save Search As: Save

- 3) Enter the search criteria into the form. The recommended search fields are Last Name and Date of Birth.

**Note: The more information you put the more chances there are for an entry error.**

### Search Criteria

Identification Number	is		+	-
First Name	is		+	-
Last Name	is	Stemcell	+	-
Date of Birth	is	1988/01/01	+	-
CTC/IR	is	TC-Vancouver Gener...	+	-
Gender	is		+	-
Patient Status	is	Active	+	-
Role	is	Canadian Patient	+	-

Maximum Number of Results:

Save Search As:

- 4) Click the “Search” button.
- 5) The search results will appear.

**Result List: 1 Account Found**

Patient ID	First Name	Last Name	Ethnicity	Date of Birth	Country	CTC/IR	Patient Sta
CAP7000019792	Example	Stemcell		1988/01/01	CA	TC-Vancouver General Ho...	Active

The maximum number of search results the system will retrieve are 100. If there is no results that match your search criteria the following will appear:

**Result List: 0 Accounts Found**

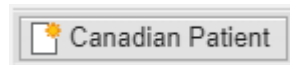
6)

If...	Then...
Patient is found	Click on the ‘Patient ID’ or ‘Last Name’ to open the patient profile
Patient is not found	Create new patient profile

## 2.2 Creating a patient profile

Once a search has been completed for a patient profile and found that he/she is not already in the system, a new patient profile will need to be created.

- 1) Click on the “Canadian Patient” icon.

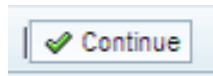


- 2) Complete the required information:
  - First Name
  - Last Name
  - Date of Birth
  - Gender.

**Note: Any information used in the search will be automatically populated.**

A screenshot of a web application form titled "Account Details" with an "Edit" link. The form is divided into two main sections: "General Data" and "Other Information".  
Under "General Data", there are four input fields: "First Name:" with the value "Randy", "Middle Name:" (empty), "Last Name:" with the value "Stemcell", and "Other Last Name:" (empty). Below these are "Date of Birth:" with the value "1977/02/02" and a calendar icon, and "Gender:" with a dropdown menu showing "Male".  
Under "Other Information", there are two fields: "Language:" (empty) and "Country:" with a dropdown menu showing "CA" and a button labeled "Canada".  
At the bottom of the form is a section labeled "Notes" with a large empty text area.

- 3) Click the “Continue” button.



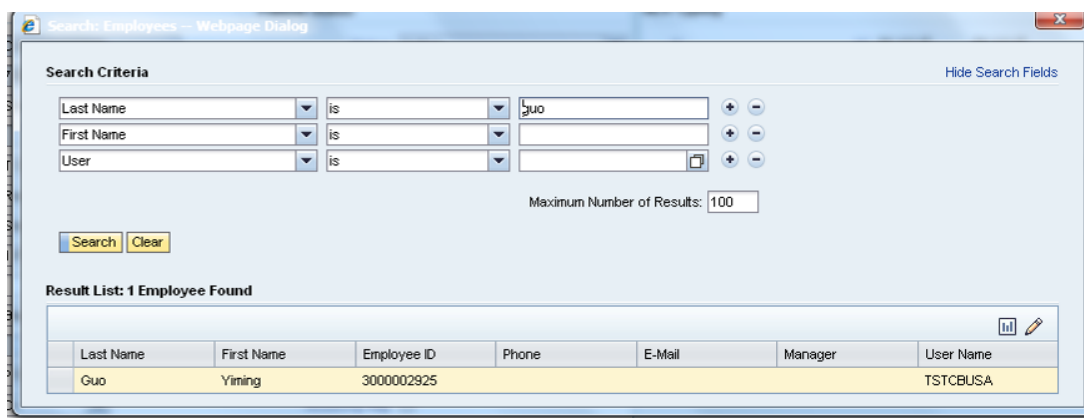
- 4) Enter the Diagnosis and complete any other Diagnosis Information.
- 5) Enter any other Patient information in the ‘General Data’ section.



- 6) To change the ‘CTC/IR owner’,
  - Click the box to the right of the current owner name

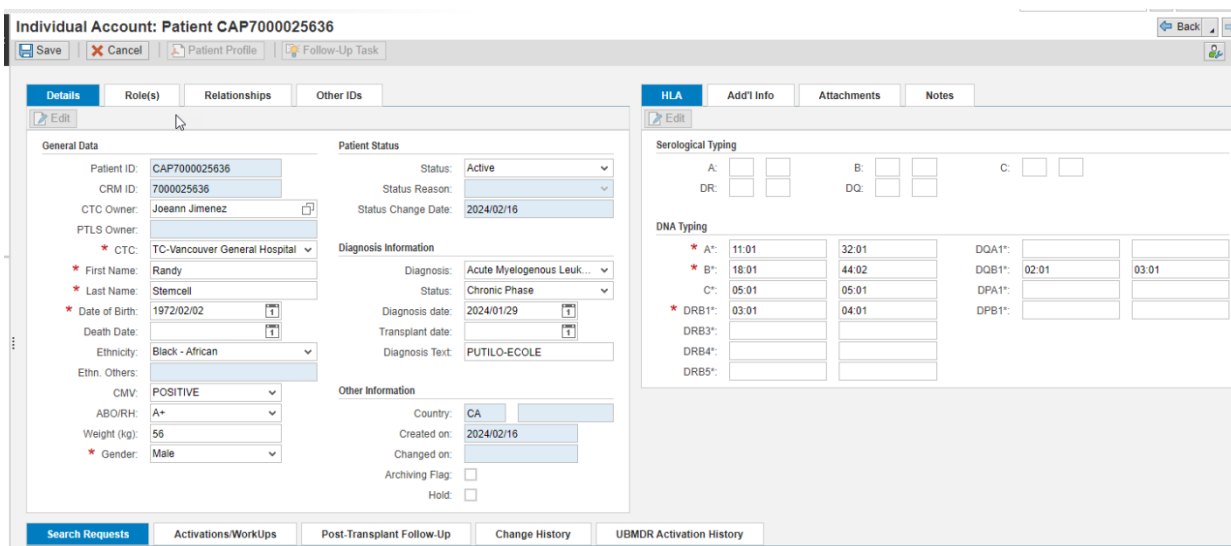
CTC/IR Owner: Sinclair Tudor

- Enter the name of the new owner
- Select the owner from the search results.



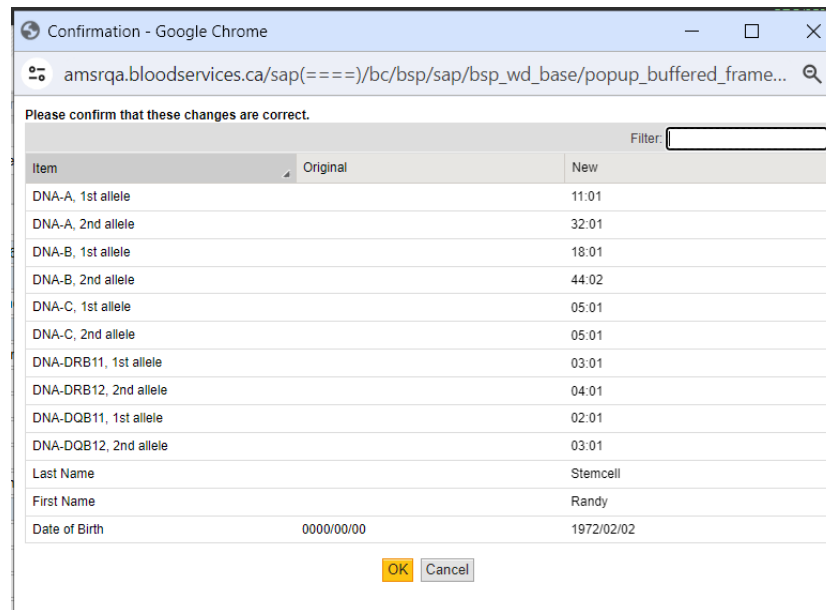
- 7) Enter the ‘HLA Typing’.

**Note: DNA typing for HLA-A, B, and DRB1 is mandatory.**

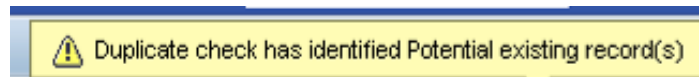


- 8) Click the ‘Attachments’ tab and attach a copy of the HLA test results.
- 9) Click the “Save” button. This will save your patient in the system. If the patient profile is cancelled before this step, any information entered would not be saved and will need to be re-entered.

- 10) A confirmation screen will appear to verify the information just entered. Click “OK” if the information is correct or “Cancel” to make changes.

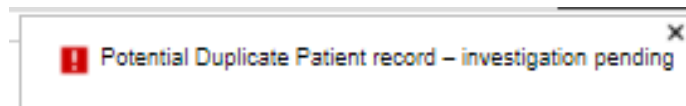


- 11) If a duplicate profile was detected a warning message will appear in the top right corner with the message “Duplicate check has identified Potential existing record(s)”.



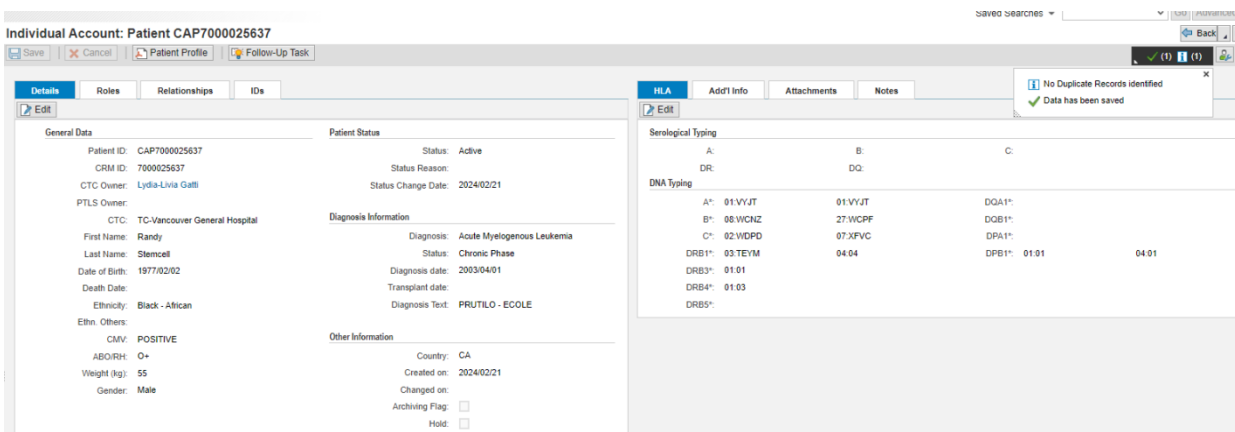
The ability to create new Searches (other than the WMDA Donor search) will be disabled pending the potential duplicate patient assessment.

Activations creation will be disabled pending the potential duplicate assessment, SCNSS will display the following denial message if an Activation request is attempted “Potential Duplicate Patient record – investigation pending”.



The registry Search analyst will be notified and will investigate and will send notification when the duplicate has been addressed.

- 12) If the save was successful, a green check mark will appear in the top right corner with the message “Data has been saved”.



- 13) Upon the successful creation of a new patient, the WMDA Donor search for Registrants will automatically be created.

### 2.3 Changing a patient status

A Patient’s status may need to be changed because the search is being suspended /stopped or a previous suspended/stopped search needs to be reactivated.

If a patient is transferring to another Transplant Centre, the original search will need to be stopped.

The patient status should also be updated following a transplant or patient death.

- 1) Open patient profile.
- 2) Click the “Edit” button in the Details section.
- 3) Select the correct status from the drop down box.

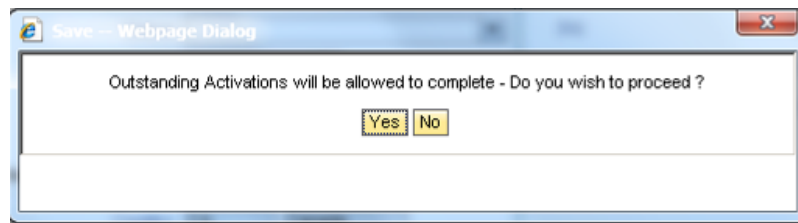


Active	searches and activations may be requested.
Suspended	new searches may be submitted, but no new activations can be requests. Existing activations will continue.
Stopped	no searches or activation may be submitted and all open activations will be cancelled.

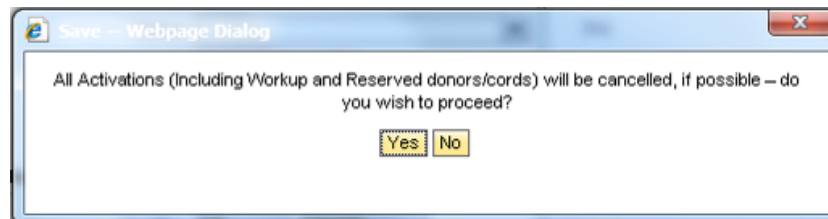
- 4) If 'Suspended' or 'Stopped' is selected, select the "Status Reason".

The screenshot shows a web form with two main sections: "Patient Status" and "Diagnosis Information". In the "Patient Status" section, the "Status" dropdown is set to "Stopped". The "Status Reason" dropdown is open, showing a list of options: "Duplicate Record", "Good Clinical Condition", "No Suitable Donor Found", "No activity in the last 6 months", "Other Reason", "Other/Better Donor Found", and "Patient Condition Deteriorated". The "Status Change Date" field is currently empty. In the "Diagnosis Information" section, the "Diagnosis" dropdown is set to "No activity in the last 6 months", and the "Status" dropdown is set to "Other Reason". The "Diagnosis date" and "Transplant date" fields are also present but empty.

- 5) Click "Save".
- 6) A pop up window will appear if there are any open activations or work-ups if the patient status is set to Suspended. Any activations or work-ups will proceed. Click "Yes" or "No".



- 7) A pop up window will appear if there are any open activations or work-ups if the patient status is set to stopped. Any activations or work-ups will be cancelled, if possible. Click "Yes" or "No".



### 2.4 Changing a patient's HLA typing

When an active patient has the HLA typing changed, WMDA search (es) will automatically be re-run. Any Fax International Search requests will have to be manually requested again with the new typing.

- 1) Open patient profile.
- 2) Click the “Edit” button in the HLA tab.
- 3) Enter the new HLA typing.

The screenshot shows the 'HLA' tab of a patient profile. The 'Edit' button is highlighted. The 'HLA Typing' section contains the following fields:

A:	<input type="text"/>	<input type="text"/>	A*:	<input type="text" value="01:VYJT"/>	<input type="text" value="01:VYJT"/>	DQA1*:	<input type="text"/>	<input type="text"/>
B:	<input type="text"/>	<input type="text"/>	B*:	<input type="text" value="08:WCNZ"/>	<input type="text" value="27:WCPF"/>	DQB1*:	<input type="text"/>	<input type="text"/>
C:	<input type="text"/>	<input type="text"/>	C*:	<input type="text" value="02:WDPD"/>	<input type="text" value="07:XFVC"/>	DPA1*:	<input type="text"/>	<input type="text"/>
DR:	<input type="text"/>	<input type="text"/>	DRB1*:	<input type="text" value="03:TEYM"/>	<input type="text" value="04:04"/>	DPB1*:	<input type="text"/>	<input type="text"/>
DQ:	<input type="text"/>	<input type="text"/>	DRB3*:	<input type="text"/>	<input type="text"/>	HLA Others:	<input type="text"/>	
			DRB4*:	<input type="text"/>	<input type="text"/>			
			DRB5*:	<input type="text"/>	<input type="text"/>			

- 4) Click “Save”.
- 5) A confirmation screen will appear to verify the changes entered. Click “OK” if the information is correct or “Cancel” to make changes.

The screenshot shows a 'Confirmation -- Webpage Dialog' window with the following content:

Please confirm that these changes are correct.

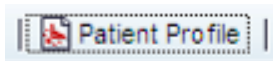
Item	Original	New
DNA-A, 1st allele	01:VYJT	01:01

OK Cancel

## 2.5 Patient profile report

A patient profile report can be printed off which includes HLA typing, search requests, activations/ work ups, notes and change history.

- 1) Open the patient profile.
- 2) Click the “Patient Profile” button.



- 3) The patient profile report will open in a separate window.

**Note: If you do not see the report, check the bottom of the screen for a new tab.**



**Canadian Blood Services Stem Cell Registry**  
 1800 Alta Vista Drive, Ottawa, ON, CANADA K1G 4J5  
 T 1-613-739-2435 F 1-613-739-2275  
 Toll free: 1-866-233-2445  
 www.blood.ca

### Canadian Patient Profile

**Patient ID:** CAP7000011348

**Registry:** Canadian Blood Services Stem Cell Registry

**Transplant Centre:** TC-Princess Margaret Hospital

**Printed:** 2019-11-08

Details					
<b>Name (Last, First):</b> <input type="text"/>					
<b>Middle name:</b>			<b>Previous last name:</b>		
<b>Date of birth:</b>	<b>Death date:</b>	<b>Gender:</b>	<b>ABO/RH:</b>	<b>CMV:</b>	<b>Weight (kg):</b>
1999-09-09		Male	A+		92
<b>Ethnicity:</b>		Caucasian		<b>Ethnicity others:</b>	
<b>Status:</b>		Active		<b>Status reason:</b>	
<b>Created on:</b>	<b>Changed on:</b>	<b>Last activation:</b>	<b>Country:</b>	<b>Archiving flag:</b>	<b>Duplicate hold:</b>
2016-06-03	2019-05-16	2018-10-24	CA	<input type="checkbox"/>	<input type="checkbox"/>
Diagnosis					
<b>Diagnosis:</b>		Myelofibrosis		<b>Status:</b>	
<b>Diagnosis text:</b>					
<b>Diagnosis date:</b>		2016-05-12		<b>Transplant date:</b>	2016-09-29

## 2.6 Patient activations and work-ups

A list of all activations that have been requested for a patient can be found in the ‘Activations/ Work-Ups’ tab of the patient profile.

Search Requests									
Activations/WorkUps									
Post-Transplant Follow-Up									
Change History									
UBMDR Activation History									
									Filter: <input type="text"/>
ID	Transaction Type	Request Type	Patient ID	Registrant/CBU ID	Registry/CBB	Status	Created On	Reservation Ends...	
8000546368	CDN Work-Up, REG	PBSC	CAP7000023265	5103 0002 0024 3684 700	CA-Canadian Blood Services S...	Completed	2022/11/01	2023/01/09	
8000528611	CDN Work-Up, REG	PBSC	CAP7000023265	5103 0002 0024 3684 700	CA-Canadian Blood Services S...	Completed	2022/05/09	2022/06/16	
8000524782	INT VT, REG	VT	CAP7000023265	6939 LSA0 0050 5 162 214	DE-ZKRD-6939	Completed	2022/03/29	2022/07/24	
8000522290	CDN VT, REG	VT	CAP7000023265	5103 0002 0024 3684 700	CA-Canadian Blood Services S...	Completed	2022/03/09	2022/06/23	
8000522289	INT VT, REG	VT	CAP7000023265	6939 DKM0 0125 4033 323	DE-DKMS Registry gGmbH-4596	Completed	2022/03/09	2022/06/27	

For registrants, the ‘Registrant/CBU ID’ column will display the ‘GRID’ (if known) or the original registrant identifier.

**Note:** **Hovering over the ‘GRID’ identifier in the ‘Registrant/CBU ID’ field on a particular entry within the Activations/WorkUps list will display its original registrant identifier (if it’s available).**

### 3 Search requests

A WMDA Donor search will automatically be run using default search settings as soon as a new patient is saved and will be automatically rerun by WMDA every night for patient with Active status. WMDA CBU and FAX International searches need to be created manually.

**Note: ‘Bone Marrow Donors Worldwide (BMDW) has been rebranded to World Marrow Donor Association (WMDA) Search & Match Service. BMDW may still appear with historical searches.**

#### 3.1 WMDA Donor search results

- 1) Open the ‘Patient Profile’.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the WMDA Donor line when status is ‘Results Received’.

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On
1736910	WMDA Donor		Results Received	Lydia-Livia Gatti / Toronto ON M2J 3X1	2024/02/13

- 4) Search results will appear.

**Search Request 1736910, WMDA Donor**

Settings: Algorithm: ATLAS, Loci to consider: n/6 search (at HLA-A, B, DRB1), No. of mismatches: 1

Donor Filter Attributes: Show Only Favourite: , Show Only CDN (ION=5...): , CMV: Ignore, Sex: Ignore, Blood Group: Ignore, Status: Ignore, DPB1 Match Grade: Ignore, Inexplicable: Ignore, Max Number of Results: 250

Allowed Mismatched Antigens: HLA-A: , HLA-B: , HLA-C: , HLA-DRB1: , HLA-DOB1:

Required Typed Loci: HLA-C: , HLA-DRB1: , HLA-DOB1:

Sorting Settings: Primary: Standard

N	MFV	F	MC	Co	ION	GRID	Age	Sex	Race	Avail. Status	Since CMV	ABO	Height	Weight	Match	A	pA	B	pB	C	pC	DRB1	pDR	DOB1	pDQ	DPB1	TCE3
1	0/0/-			AU	7748	7748 0000 3001 0981 624	39	F	PI	AV					4/31/05	01:XX 01:XX		52:XX 52:XX				04:XX 04:XX		4			
2	-/-/-			IL	5239	5239 0001 0002 8490 204	25	F		AV					0/100/0	01:BZFPN 01:BZFPN		52:BZEBB 52:BZEBB		12:BZEJM 12:BZEJM		04:BZEBM (15:BGNHA)		04:BZEKN 06:BZENF		04:BZEKB 04:BZEKB	
3	0/0/-			PL	7414	7414 DK10 0012 1644 235	28	M	UNK	AV		B+	182 104		0/100/0	01:ABGEP 01:ABGEP		52:ENDB 52:ENDB		12:02 12:02		04:04:01 (15:02:01)		03:YGMH 06:ZANB		02:ACHGJ 13:KHNN	

**Note: Although the user is allowed to enter up to 40 characters for each of patient first and last name fields, the Patient Name field in the Search Request Details section and on the PDF search report will only display 65 characters in total**



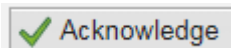
5) Results are sorted and listed with best possible matches first.

**Note:** Canadian donors are displayed at the top of each match grade category; their overall rank within the search is displayed in the left column ('N') when 'Standard' filtering is selected as the Primary sorting setting. When "Sum of Probabilities" filtering is applied, results will be displayed based on Rank position (no Canadian donor/CBU showcasing).

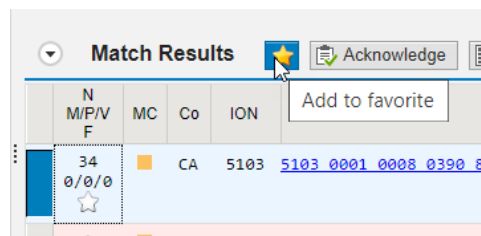
**Note:** To apply filter to display only Canadian donors/CBUs check the 'Show only CDN (ION 5103)' checkbox.

N	M/P/V	MC	Co	ION	GRID	Age	Sex	Avail. Since	ABO
	F					Race		Status	Height
								CMV	Weight
1	0/0/-	■	AU	7748	7748 0000 3001 0981 624	39	F	AV	
	☆				7748 0000 3001 0981 624				
2	-/-/-	■	IL	5239	5239 0001 0002 8490 204	25	F	AV	


6) New matches will be highlighted pink if the user hasn't acknowledged them. To acknowledge the new results, click the "Acknowledge" button. The pink background will disappear.



7) Favourites can be marked by selecting the donor or CBU and clicking the 'Add to Favourite' icon; to display only those marked as favourites, check the 'Show Only Favourite' filter attribute.



To print the search results, click on the “View as PDF” button. The PDF report of the search results will open and able to be printed.



**Canadian Blood Services**  
BLOOD PLASMA STEM CELLS GIGANES & TISSUES

**Canadian Blood Services Stem Cell Registry**  
 1800 Alta Vista Drive, Ottawa, ON, CANADA K1G 4J5  
 T 1-613-739-2435 F 1-613-739-2275  
 Toll free: 1-866-233-2445  
 www.blood.ca

**Donor Results**

MatchRun: 2024-07-13 20:05:59  
 Patient Name: Javrettest Matchconnect      Patient ID: CAP7000025616      Algorithm: ATLAS  
 Diagnosis: Acute Lymphoblastic Leukemia      Date of Birth: 2001-01-02      Lcd to consider: n/6 search (at HLA-A, B, DRB1)  
 Patient Registry: Canadian Blood Services Stem Cell Registry      Creation Date: 2024-02-13      No. of mismatches: 1  
 Transplant Centre: TC-Vancouver General Hospital      Patient Status: Active

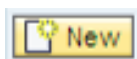
Patient							A	B	C	DRB1	DQB1	DRB345	DPB1	
ABO:      Gender: M      Weight(kg):							01:01:01	52:01:01			04:04			
Ethnicity:      CMV:														
GRID	M/P/V/T	ABO	MC ION	Gender	Age	Avail. Since	Match	A	B	C	DRB1	DQB1	DRB345	DPB1
N		Ethnicity	Country	Status	Date	Height Weight	0 / 1 / 2 %	Prob %	Prob %	Prob %	Prob %	Prob %	Prob %	TCE3
7748	0000	3001	0981	624	5/6	F	39							
0/0/-														
1		PI	AU	AV			PP-P- 4 / 31 / 65	01:XX 01:XX	52:XX 52:XX		04:XX 04:XX			
5239	0001	0002	8490	204	5/6	F	25							
-/-														
2			IL	AV			AA-M- 0 / 100 / 0	01:BZFPN 01:BZFPN	52:BZEHB 52:BZEHB	12:BZEJM 12:BZEJM	04:BZEBM (15:BGHHA)	04:BZEKW #06BZEMF		04:BZEKB 04:BZEKB
7414	DKM0	0012	1644	235	5/6	M	28							
0/0/-														
3		B+	7414	AV			AA-M- 0 / 100 / 0	01:ABGEP 01:ABGEP	52:EWDB 52:EWDB	12:02 12:02	04:04:01 (15:02:01)	03:YGKM #06ZANB		02:ACMSJ 13:KHMN
9341	0000	0002	1974	311	5/6	F	32							
0/0/-														
4			CH	OP			AA-M- 0 / 100 / 0	01:01:01G 01:01:01G	52:01:01G 52:01:01G	12:02:01G 12:02:01G	04:04:01 (14:01:01G)	03:02:01G #0503:01G		03:01:01G 06:01
3553	0000	1435	4023	529	5/6	F	34							
-/-														
			3553				AA-M- 0 / 100 / 0	01:RYKV 01:RYKV	52:AH 52:AH	12:02 12:02	04:04:01 (15:02:01)	#03:RCH #06:01		04:HJMR 15:01

### 3.2 Creating a new search

WMDA CBU and Fax International search requests need to be manually created.

**Note:** FAX International search should only be used for donors that do not have a GRID, or in cases where the donor or CBU is not available in the WMDA search results (for example, from a registry that may not frequently upload donors/CBUs to WMDA).

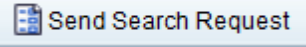
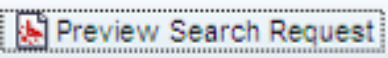
- 1) Open the ‘Patient Profile’.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click the “New” button.



- 4) The Search option screen will appear.
- 5) Select the type of search to be run.

**Note:** If WMDA CBU search has already been run, the “New” button will automatically open a Fax International search request.

6) Complete the information required:

WMDA CBU	<ul style="list-style-type: none"> <li>• Click “Save.”</li> </ul>
FAX International	<ul style="list-style-type: none"> <li>• Select the “Requested IR/CBB”</li> <li>• Enter Fax Request notes to be included in the request by clicking “New” in the Notes tab, if applicable</li> <li>• Click “Save”</li> <li>• Click “Send Search Request”.</li> </ul>  <p><b>Note: To preview the search request, click the “Preview Search Request” button.</b></p> 

7) The search will appear in the ‘Search Request’ tab. Notification will be sent when results are received for the ‘Fax IR’ search requests.

### **3.3 WMDA Donor Search results (DPB1 – TCE3 grade)**

When reviewing WMDA Donor Search, an additional HLA-DPB1 classification based on T-Cell Epitopes (TCE) value may be displayed as a DPB1 TCE3 grade. The DPB1 TCE3 grading uses the following symbols:

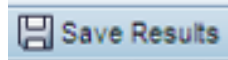
- A - Allele match
- Pe - Permissive mismatch
- G - Non-permissive mismatch in GvH direction
- H - Non-permissive mismatch in HvG direction
- X - Ambiguous or undetermined match grade

Where a DPB1 TCE3 grade is available, the mouse over function provides the probability values, where applicable.

### 3.4 Saving search results

When a search is re-run, the results override previous results. To have access to a particular search result to view or request activations in the future, the results need to be saved.

- 1) Open the search result.
- 2) In the match results section, click on the “Save Results” button.




- 3) The result PDF report is now saved as a file in the attachment section.

The screenshot shows a search results table with columns for donor ID, country, status, and various metrics. Below the table is an 'Attachments' section with a table listing saved files.

Actions	File Name	Created By	Created On
	2024-02-14 CAP7000025616 WMDA Donor.pdf	TSTALLROLES1	2024/02/14 10:02

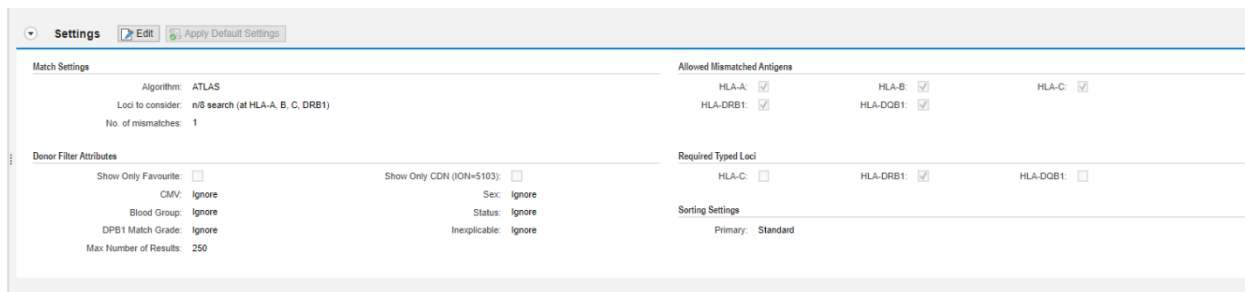
### 3.5 Changing individual search settings

Settings can be changed for each search individually.

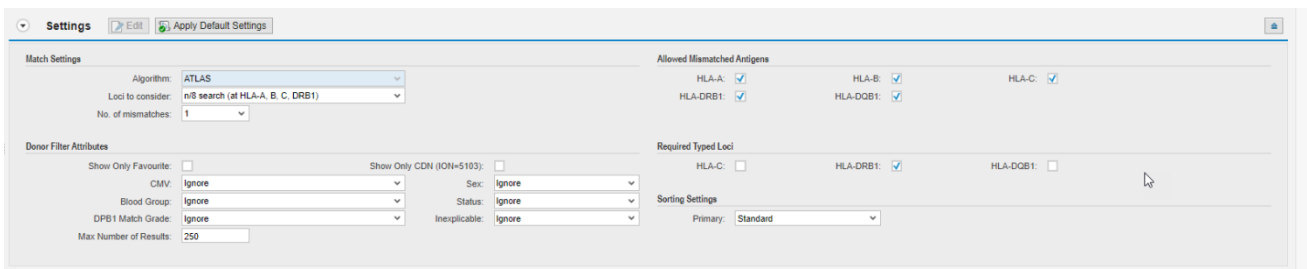
- 1) Open Patient Profile.
- 2) Open the “Search”.
- 3) Click the  to expand the setting section.



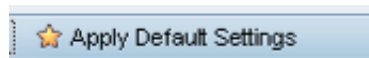
- 4) The settings for this search will appear.



- 5) Click “Edit”.
- 6) Modify the desired settings.



- 7) To set the setting back to default, click the “Apply Default Settings” button.

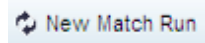


- 8) Click “Save”.

### 3.6 *New match run*

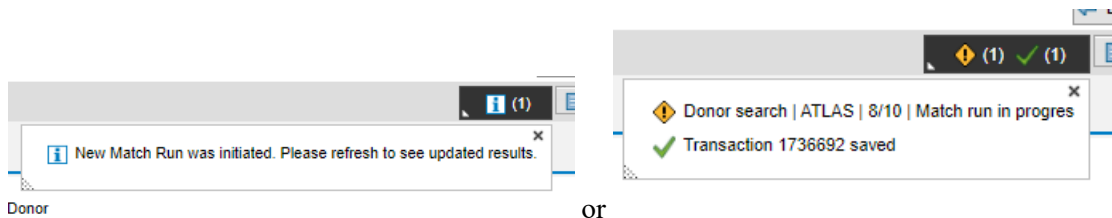
The ‘New Match Run’ button will initiate a new search using the current search settings and will provide results based on the WMDA data available at the time the ‘New Match Run’ button is clicked. It may take some time to obtain results as the search is re-executed from scratch.

It should be noted that WMDA automatically performs a refresh of Active patients searches every night. When a search is opened, the system automatically updates the search results based on the last WMDA match run/refresh (‘Latest Match Run’ date/time can be seen in the top right section of the search). Therefore, initiating a ‘New Match Run’ may not be necessary unless it is critical to know if anything has changed since the Latest Match Run date.



### 3.7 *Match run notification*

When the search is in process and the results have not been received, the following warning message will appear in the search request to notify the user.



### 3.8 Canadian Patient Difficult Search Review

A Transplant Centre can request a Difficult Search Review by the Search Analyst team. A button titled “Request Difficult Search Review” is found on the WMDA Donor Search. The Transplant Center user will complete the HLA Criteria section of the task that opens, and can set the priority of the task to ‘Very High’ if applicable.

Once the Task is Saved by the Transplant Center user, a “Patient – Difficult Search Review” task will be created and assigned to the Search Analyst team.

**Note: If anything is changed on the task after it has been saved, a Follow-Up task must be sent to the Search Analysts to inform them of the updated information.**

When the Search Analyst has completed the Patient- Difficult Search Review task, the system will assign a task titled “Patient – Difficult Search Review Completed” to the TC user.

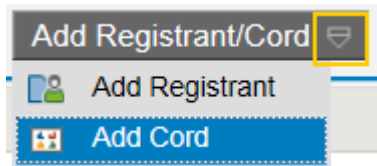
The Canadian Transplant Centre (CTC) user can navigate to the Patient Profile / Attachments assignment block to view the resulting non-editable SYS11 form created by the Search Analyst.

### 3.9 Managing entries on Fax International searches

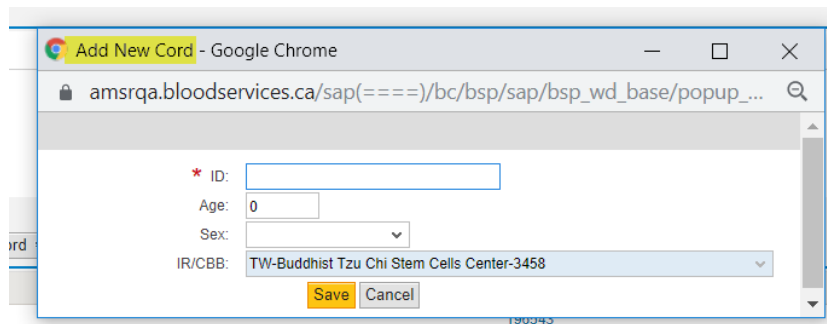
FAX International search should only be used for donors that do not have a GRID, or in cases where the donor or CBU is not available in the WMDA search results (for example, from a registry that may not frequently upload donors/CBUs to WMDA).

#### 3.9.1 Adding a new International Cord Blood Unit (CBU)

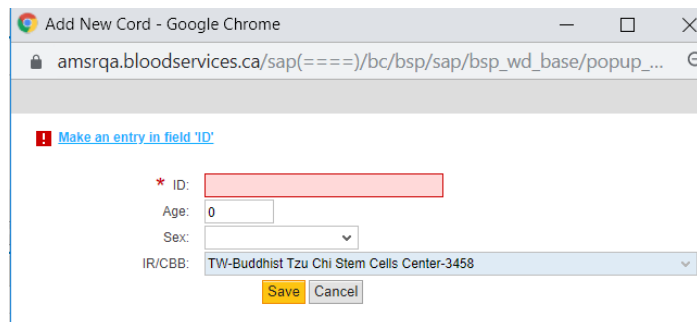
- 1) Click on “Add Registrant/Cord” drop-down list.
- 2) Select ‘Add Cord’.



- 3) Enter ‘ID’.
- 4) Enter ‘Age’.
- 5) Select ‘Sex’.
- 6) Click “Save”.



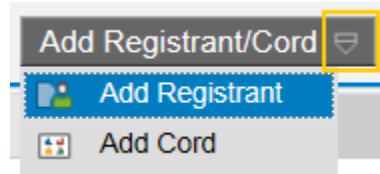
**Note:** Entry validations will be performed upon save. Error messages, if any, will be displayed and impacted fields highlighted in red.  
**For example:**





### 3.9.2 Adding a new International registrant

- 1) Click on “Add Registrant/Cord” drop-down list.
- 2) Select ‘Add Registrant’.



- 3) Enter ‘GRID’ (either normal or eye-readable format will be accepted).
- 4) Enter ‘ID’.
- 5) Enter ‘Age’.
- 6) Select ‘Sex’.
- 7) Click “Save”.

A screenshot of a web browser window titled 'Add New Registrant - Google Chrome'. The address bar shows 'amsrqa.bloodservices.ca/sap(===)/bc/bsp/sap/bsp\_wd\_base/popup\_...'. The form contains the following fields: 'GRID:' (text input), 'ID:' (text input), '\* Age:' (text input with '0' entered), '\* Sex:' (dropdown menu), and 'IR/CBB:' (dropdown menu with 'TW-Buddhist Tzu Chi Stem Cells Center-3458' selected). At the bottom are 'Save' and 'Cancel' buttons.

**Note:** Entry validations will be performed upon save. Error messages, if any, will be displayed, and impacted fields highlighted in red.  
**For example:**

A screenshot of the same web browser window as above, but with validation errors. At the top, there are three error messages: 'Make an entry in field 'Sex'', 'Make an entry in field 'Age'', and 'Make an entry in field 'GRID' or 'ID''. The 'Age' and 'Sex' fields are highlighted in red. The 'GRID' and 'ID' fields are empty.

### 3.9.3 Search results list

Registrants and Cord Blood Units (CBUs) entered by users will appear on the search results list:

Actions	IR/CBB	GRID	ID	CBU	Age	Sex
	TW-Buddhist Tzu Chi Stem Cells Center-TW/TWCB	3458 000T WDON 0NEW 113	TW-DON-NEW-1		31	Female
	TW-Buddhist Tzu Chi Stem Cells Center-TW/TWCB		TW-CBU-1	Yes	1	Male
	TW-Buddhist Tzu Chi Stem Cells Center-TW/TWCB		TW-DON-OLD-2		32	Male
	TW-Buddhist Tzu Chi Stem Cells Center-TW/TWCB		TW-DON-OLD-3		33	Female

Actions	IR/CBB	GRID	ID	CBU	Age	Sex
	TW-Buddhist Tzu Chi Stem Cells Center-3458		196543		40	Male
	TW-Buddhist Tzu Chi Stem Cells Center-3458		241500		46	Male
	TW-Buddhist Tzu Chi Stem Cells Center-3458		183701		42	Male
	TW-Buddhist Tzu Chi Stem Cells Center-3458		147828		41	Male
	TW-Buddhist Tzu Chi Stem Cells Center-3458	3458 000T WDON 0NEW 113			35	Male
	TW-Buddhist Tzu Chi Stem Cells Center-3458		TWCOR0123	Yes	3	Female

**Note:** ‘GRID’ is displayed in an eye-readable format, regardless of how it was entered.

### 3.9.4 Editing the list

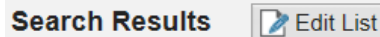
Editing (add/modify/remove values) is performed directly on the search results list and can be done only on the enabled fields.

**Note:** When the first activation or work-up request is initiated, the system will automatically create the corresponding international registrant or Cord Blood Unit (CBU) profile in the background. Ability to edit the entry will depend on existence of its underlying profile.

If Registrant/CBU profile...	Then...
Does not exist,	Editing will be enabled in any applicable column. <b>Note: The ‘GRID’ is not applicable for Cord Blood Units (CBUs).</b> <b>Note: The ‘CBU’ flag is not applicable for registrants.</b>
Exists,	Editing will only be enabled in the ‘GRID’ column for adding the Global Registration Identifier for Donors (GRID) values if they were originally missing.

**Note:** Fields enabled for editing appear with white background.

- 1) Click on “Edit List” button.



Examples:

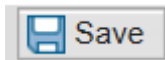
- line 1 – not editable (registrant has an activation)
- line 2 – editable fields (‘ID’, ‘Age’, ‘Sex’)
- line 3 – editable fields (only ‘GRID’, as registrant has an activation)
- line 4 – editable fields (‘GRID’, ‘ID’, ‘Age’, ‘Sex’)
- line 5 – editable fields (‘GRID’ e.g. to correct a data entry error, ‘ID’, ‘Age’, ‘Sex’)

Acti...	IR/CBB	GRID	ID	CBU	Age	Sex
	TW-Buddhist Tzu Chi Stem Cells Center- -3458	3458000TWDON0NEW113	TW-DON-NEW-1		31	Female
1			TW-CBU-1	Yes	1	Male
2			TW-DON-OLD-2		32	Male
3			TW-DON-OLD-3		33	Female
4			TW-DON-NEW-2		22	Male
5		3458000TWDON0NEW211				

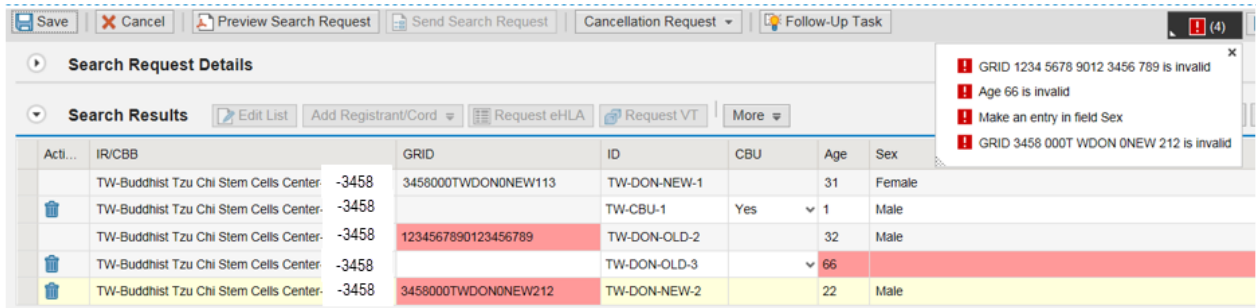
- 2) Enter ‘GRID’ if known, but were initially missing, where applicable.
- 3) Enter the correct ‘GRID’ if initial values were incorrect, where applicable.
- 4) Enter the correct ‘ID’ if initial values were incorrect, where applicable.
- 5) Enter the correct ‘Age’ if initial values were incorrect, where applicable.
- 6) Select the correct ‘Sex’ if initial values were incorrect, where applicable.

**Note:** To remove incorrect values instead of replacing them, clear the applicable fields.

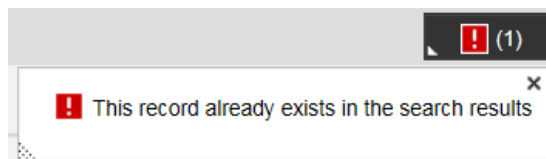
- 7) Click “Save”.



**Note:** Entry validations will be performed upon save. Error messages, if any, will be displayed, and impacted fields highlighted in red. For example:



**Note:** Error message will be displayed, and impacted fields highlighted in red, when ‘GRID’ or ‘ID’ are not unique on the list.



**For example:**


GRID	ID
3458000TWDON0NEW113	TW-DON-NEW-1
	TW-CBU-1
	TW-DON-OLD-2
	TW-DON-OLD-3
3458000TWDON0NEW113	TW-DON-NEW-2


GRID	ID
3458000TWDON0NEW113	TW-DON-NEW-1
	TW-CBU-1
	TW-DON-OLD-2
	TW-DON-NEW-2
3458000TWDON0NEW211	TW-DON-NEW-2

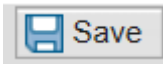
### 3.9.5 Deleting entries

Deletion of an entire entry is performed directly on the search results list.

**Note:** Existence of the international registrant or Cord Blood Unit (CBU) profile does not necessarily mean that an activation/work-up transaction also exists (for example, the profile will still be created when the first new activation/work-up creation was initiated, but then cancelled without a save). Ability to delete the entry from the search results list will depend on existence of at least one activation or work-up request associated with it.





If activation/work-up request...	Then...
Does not exist,	Deletion will be enabled. 
Exists,	Deletion will be disabled.

- 1) Click on  action of the desired entry.
- 2) Click “Save”.



Examples:

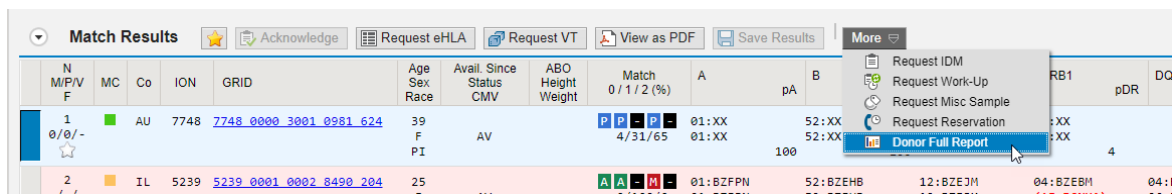
- line 1 – deletion disabled (registrant has an activation)
- line 2 – deletion enabled
- line 3 – deletion disabled (registrant has an activation)
- line 4 – deletion enabled
- line 5 – deletion enabled
- line 6 – deletion enabled (registrant profile exists, but has no activation/work-up)

Search Results							
Actions	IR/CBB	GRID	ID	CBU	Age	Sex	
	TW-Buddhist Tzu Chi Stem Cells Center	-3458	3458 000T WDON ONEW 113	TW-DON-NEW-1		31	Female
	TW-Buddhist Tzu Chi Stem Cells Center	-3458		TW-CBU-1	Yes	1	Male
	TW-Buddhist Tzu Chi Stem Cells Center	-3458		TW-DON-OLD-2		32	Male
	TW-Buddhist Tzu Chi Stem Cells Center	-3458		TW-DON-OLD-3		33	Female
	TW-Buddhist Tzu Chi Stem Cells Center	-3458	3458 000T WDON ONEW 211	TW-DON-NEW-2		22	Male
	TW-Buddhist Tzu Chi Stem Cells Center	-3458		TW-DON-NEW-3		23	Male

## 4 WMDA Donor and WMDA Cord Full Reports

WMDA Donor and Cord Full reports can be generated at any time from the WMDA Donor or WMDA CBU search request results.

- 1) Open Patient Profile that the report is for.
- 2) Click on the 'Search Requests' tab.
- 3) Click on the 'SR ID' of the applicable WMDA search request.
- 4) Search results will appear.
- 5) Highlight the donor or cord blood unit.
- 6) Select 'Donor Full Report' or 'Cord Full Report'



The screenshot shows a table of search results with columns for N, M/P/V, F, MC, Co, ION, GRID, Age, Sex, Race, Avail. Status, Since CMV, ABO Height, Weight, Match, A, pA, B, and others. A 'More' dropdown menu is open over the first row, showing options: Request IDM, Request Work-Up, Request Misc Sample, Request Reservation, and Donor Full Report. The 'Donor Full Report' option is highlighted.

N	M/P/V	F	MC	Co	ION	GRID	Age	Sex	Race	Avail. Status	Since CMV	ABO Height	Weight	Match	A	pA	B		
1	0/0/-		AU	7748	7748_0000_3001_0281_624	39	F	PI	AV					01:XX 4/31/65	01:XX	52:XX	52:XX		
2			IL	5239	5239_0001_0002_8490_204	25								01:8ZFPN	01:8ZFPN	52:8ZEHB	52:8ZEHB	12:8ZEJM	12:8ZEJM

- 7) The report will be generated and can be saved or printed as required.

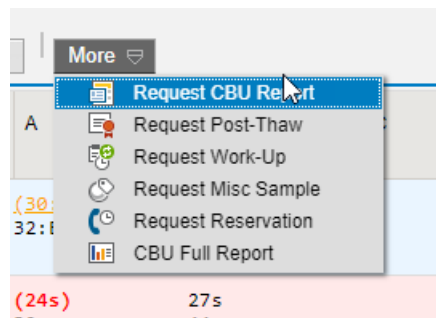
## 5 Cord Blood Unit (CBU) report

### 5.1 Requesting a Canadian Cord Blood Unit (CBU) report

- 1) Open patient profile that the Cord Blood Unit (CBU) report request is for.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the ‘WMDA CBUsearch.

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON MJJ 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON MJJ 3X1	2024/02/14	TSTCBUSA

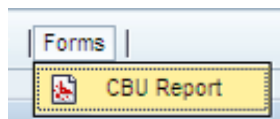
- 4) Search results will appear.
- 5) Highlight the cord blood unit.
- 6) Select “Request CBU Report”.



- 7) The ‘CDN CBU Report Req’ activation screen will appear.

A screenshot of the 'CDN CBU Report Req: New' activation screen. The screen is divided into several sections: 'Activation Details', 'Partners', and 'Attachments'. The 'Activation Details' section includes fields for 'General Data' (Description: CDN CBU Report Request, Request Method: Fax, Com. Method: Internal, Request Type: CBU Report Request), 'Request' (Request Created On: 2019/12/12, Acknowledged by IR On:), 'Request to Cancel' (Status, Reason, Requested On), and 'Activation' (Status: In Process, Reason:). The 'Partners' section shows a table with columns for 'Partner Function', 'Partner Name', and 'ID'. The table contains three rows: 'CTCAR' (BC CHILDRENS HOSPITAL, CAP7000011483), 'Registrant/CBU' (CBU CAC1001346071, CAC1001346071), and 'Registry/CBB' (Canadian Blood Services Stem Cell). The 'Requester' field is also visible.

- 8) Click “Save”. The activation will now be completed.
- 9) To view the Cord Blood Unit (CBU) report, click “Forms” and select “CBU Report”.



**Note:** This will open a separate window that does not automatically pop up on your screen.



**Canadian Blood Services Stem Cell Registry**  
 1800 Alta Vista Drive, Ottawa, ON, CANADA K1G 4J5  
 T 1-613-739-2435 F 1-613-739-2275  
 Toll free: 1-866-233-2445  
 www.blood.ca

**CORD BLOOD UNIT REPORT**

Report Date and Time: 2019-12-06 15:34:12/EST

Registry CBU ID: CAC1001709057

Patient ID: CAP7000014493

CBU Bag ID: C064317001628

Patient Name (Last, First)	[REDACTED]
Patient Registry/ Transplant Centre	TC-The Hospital for Sick Children
Patient's Date of Birth	2013-05-02
Maternal ID	CAUB00314854

*All dates are in YYYY-MM-DD format.*

Availability Status	Available	Unavailable Until	
Ethnicity	Baby: Caucasian	Collection End Date	2017-06-12
	Mother: Caucasian	Collection End Time/Time Zone	22:55:00/EST
	Father: Caucasian		
Baby Gender	Male	Processing & Cryopreservation Date	2017-06-13
Birth Date	2017-06-12	Cryopreservation Time/Time Zone	15:46:00/EST

**CBU SEGMENTS & SAMPLES**

Attached Segments	1	total in storage
	0	may be requested
Cord Plasma Samples	2	total in storage
	1	may be requested
Cord Nucleated Cell Samples	2	total in storage
	1	may be requested

**MATERNAL SAMPLES**

Maternal Plasma	2	total in storage
	1	may be requested
Maternal Nucleated Cells	2	total in storage
	1	may be requested

- 10) The Cord Blood Unit (CBU) report can be Printed or Saved.



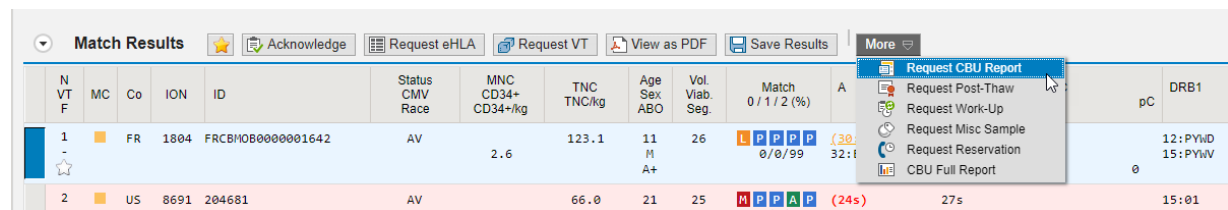
**5.2 Requesting an international Cord Blood Unit (CBU) report**

- 1) Open patient profile that the Cord Blood Unit (CBU) report request is for.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

**Note: If CBU is not available in the WMDA search results, use FAX International search request**

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 4) Search results will appear.
- 5) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the cord blood unit, if not already listed.
- 6) Highlight the cord blood unit.
- 7) Select “Request CBU Report”.



- 8) The ‘INT CBU Report Req’ activation screen will appear.

**INT CBU Report Req: New**

Save | Cancel

**Activation Details**

Edit

<b>General Data</b>	<b>Request</b>
Description: INT CBU Report Request	Request Created On: 2014/05/21
Request Method: CTC	Request Sent On:
Com. Method: Fax	Acknowledged by IR On:
Request Type: CBU Report Request	
<b>Request to Cancel</b>	<b>Results</b>
Status:	Results Rec'd On:
Reason:	Results Sent On:
Requested On:	
<b>Activation</b>	
Status: In Process	
Reason:	

- 9) Click “Save”.

### **5.2.1 Receiving an international Cord Blood Unit (CBU) report**

- 1) Receive task “CBU Report – Results available”.

---

**CBU Report – Results Available**

- 2) Assign and open task.
- 3) Open activation.
- 4) Cord Blood Unit (CBU) report will be in the ‘Attachments’ tab.
- 5) Set task to completed.

## 6 Extended HLA (eHLA)

### 6.1 Request extended typing (eHLA)

- 1) Open patient profile.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

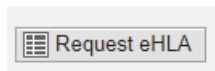
**Note: If donor does not have a GRID or donor or CBU is not available in the WMDA search results, use FAX International search request**

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 4) Search results will appear.
- 5) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the cord blood unit or registrant, if not already listed.
- 6) Highlight the registrant or Cord Blood Unit (CBU) for activation.

N	M/F/V	MC	Co	ION	GRID	Age	Sex	Race	Avail. Since	Status	CMV	ABO	Height	Weight	Match	A	B	C	pA	pB	pC	DRB1	pDR	DOB1	pDQ
0/0/0		CA	5103	5103	0001 0008 0390 827	49	F	CAU	2011-03	AV		173	59	0/0/55	(26:GKHG) 32:GPBH	27:GPXP 44:GPYG		100	0		12:EKFZ 15:GPHD	100		87	
1	0/0/-	DE	5525	6939	DKH0 0025 3262 533	66	F	CAU	AV					0/1/46	(25:XX) 29:AZRC	27:XX 44:XX		77		2	12:RDT 15:XX	95		90	

- 7) Click on the “Request eHLA” button.



- 8) Check the type of extended HLA to be completed.

**Notes: Only the services offered by the registry will be available for selection.**

**CDN eHLA, REG: New**

Save | Cancel | Testing of SYS forms

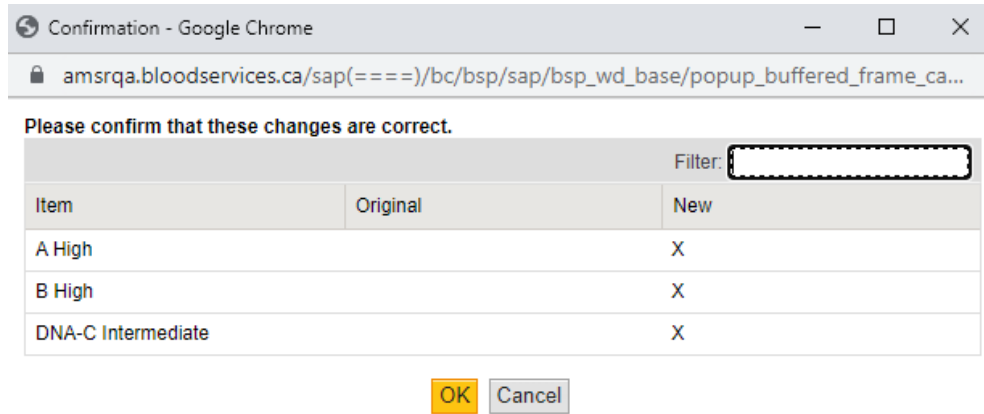
**HLA Typing Requests**

Low	Intermediate	High	Other
A*: <input type="checkbox"/>	A*: <input type="checkbox"/>	A*: <input checked="" type="checkbox"/>	KIR: <input type="checkbox"/>
B*: <input type="checkbox"/>	B*: <input type="checkbox"/>	B*: <input checked="" type="checkbox"/>	
C*: <input type="checkbox"/>	C*: <input checked="" type="checkbox"/>	C*: <input type="checkbox"/>	
DRB1*: <input type="checkbox"/>	DRB1*: <input type="checkbox"/>	DRB1*: <input type="checkbox"/>	
DRB 3/4/5*: <input type="checkbox"/>	DRB 3/4/5*: <input type="checkbox"/>	DRB 3/4/5*: <input type="checkbox"/>	
DPA1*: <input type="checkbox"/>	DPA1*: <input type="checkbox"/>	DPA1*: <input type="checkbox"/>	
DPB1*: <input type="checkbox"/>	DPB1*: <input type="checkbox"/>	DPB1*: <input type="checkbox"/>	
DQA1*: <input type="checkbox"/>	DQA1*: <input type="checkbox"/>	DQA1*: <input type="checkbox"/>	
DQB1*: <input type="checkbox"/>	DQB1*: <input type="checkbox"/>	DQB1*: <input type="checkbox"/>	

**Note:** The current Canadian or EMDIS registrant or Cord Blood Unit (CBU) HLA typing can be viewed in the ‘CBU HLA Typing’ or ‘Registrant HLA Typing’ tab.

Registrant HLA Typing	HLA Typing Results	KIR Typing Results	Requested Services	Relat
A: <input type="text"/>	<input type="text"/>	A*: 11:ABVCT	24:ABVCZ	
B: <input type="text"/>	<input type="text"/>	B*: 07:ABXJR	44:ABWUS	
C: <input type="text"/>	<input type="text"/>	C*: 07:ACBFC	16:ZWCS	
DR: <input type="text"/>	<input type="text"/>	DRB1*: 07:01	15:ACSTA	
DQ: <input type="text"/>	<input type="text"/>	DRB3*: <input type="text"/>	<input type="text"/>	
		DRB4*: <input type="text"/>	<input type="text"/>	
		DRB5*: <input type="text"/>	<input type="text"/>	

- 9) Click “Save”.
- 10) A Confirmation screen will appear with the typing requested. Click “Ok if the information is correct or “Cancel” if there was an error and changes need to be made.



11) The Activation status will appear as ‘On Hold’, ‘Registrant contact required’ for Canadian registrants and reservation dates are applied if no assessments are required.

If an assessment is required, for Same Date of Birth (DOB) or for Exceeding Limit, the status will be “On Hold” until the Search Analyst either ‘Cancels the Request’ or ‘Releases’ the activation.

## 6.2 Receiving eHLA results

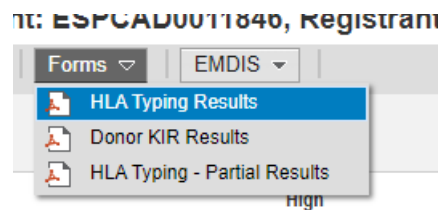
- 1) Receive task “eHLA – HLA Results Available”.

eHLA – HLA Results Available

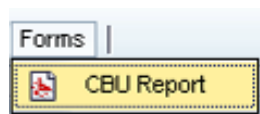
- 2) Assign and open task.
- 3) Open eHLA activation.
- 4) For Canadian or EMDIS results.
  - a. Click on the ‘HLA Typing Results’ tab to view the results for Canadian or EMDIS requests

The screenshot shows a software interface with several tabs: 'Registrant HLA Typing', 'HLA Typing Results' (selected), 'KIR Typing Results', 'Requested Services', 'Related Transactions', 'Notes', and 'Char'. The main content area displays HLA typing results for A\*, B\* (15:01), C\*, DRB1\*, DRB3\*, DRB4\*, and DRB5\*. On the right side, it shows DQA1\*, DQB1\*, DPA1\*, and DPB1\*. Below the results, there is a section for 'HLA Results Remark' with a text area. A date 'HLA Test Date: 2013/08/16' is also visible.

- b. To print a printed copy of the results, click on “Forms” and select the type for report you wish to print.



**Note: The Cord Blood Unit (CBU) report is used for Canadian Cord Blood Unit (CBU) results.**



- 5) For non-EMDIS International Registry/ Cord Blood Bank (IR/CBB) results, click on the ‘Attachments’ tab to view the attached results.
- 6) Set task to completed.

## 7 Verification typing (VT)

### 7.1 Request Verification Typing (VT)

- 1) Open patient profile.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

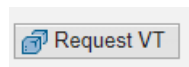
**Note: If donor does not have a GRID or donor or CBU is not available in the WMDA search results, use FAX International search request**

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 4) Search results will appear.
- 5) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the cord blood unit or registrant, if not already listed.
- 6) Highlight the registrant or Cord Blood Unit for activation.

N	M/P/V	MC	Co	ION	GRID	Age	Sex	Race	Avail. Since	Status	ABO	Match	A	pA	B	pB	C	pC	DRB1	pDR	DOB1	pDQ
34	0/0/0	CA	5103	5103	0001 0008 0390 827	49	F	CAU	2011-03	AV	173	0/0/55	(26:GKHG) 32:GPBH	27:GPXP 44:GPYG	100	0	100	0	12:EKFZ 15:GPHD	100	0	87
1	0/0/-	DE	5525	6939	DKH0 0025 3262 533	66	F	CAU		AV		0/1/46	(25:XX) 29:AZRC	27:XX 44:XX	77	2	2	12:RDT 15:XX	95		90	

- 7) Click on the “Request VT” button.



- 8) The Verification Typing (VT) activation screen will open.

The screenshot shows the 'VT Details' form with the following sections and fields:

- General Data:** Description: CDN VT, REG; Request Method: CTC; Com. Method: Internal; Request Type: VT.
- Request:** Request Created On: 2013/10/03; Acknowledged by IR On: [empty]; Reservation Ends On: 2013/12/02.
- Shipping Details:** Sent On: [empty].
- Request to Cancel:** Status: [empty]; Reason: [empty]; Requested On: [empty].
- Activation:** Status: In Process; Reason: [empty].
- Results:** VT Results Rec'd On: [empty]; HLA Results: ; IDM Results: .
- CBS IDMs:** Received On: [empty]; Sent On: [empty].

- 9) Select the 'Request Type', if applicable.  
 10) For registrant activations, click the 'Sample Request' tab  
 a. Enter/ modify the samples requested, if applicable

The screenshot shows the 'Sample Request' tab with the following table:

Product Type	Quantity	Volume (ml)
Clotted Blood:	1	2
ACD-A:	2	3
EDTA:	4	2
Heparin:	1	5
Total Volume:		21
Total Allowed for Registry:		50

**Note: The number of samples requested can not add up to more than the total allowed for the registry.**

- b. Click the 'VT Shipping' tab  
 c. Enter the 'CTC/IR Shipping Instructions', as applicable:  
 i. Earliest date of sample receipt  
 ii. Latest date of sample receipt, if applicable  
 iii. Acceptable days  
 iv. Special shipping instructions.



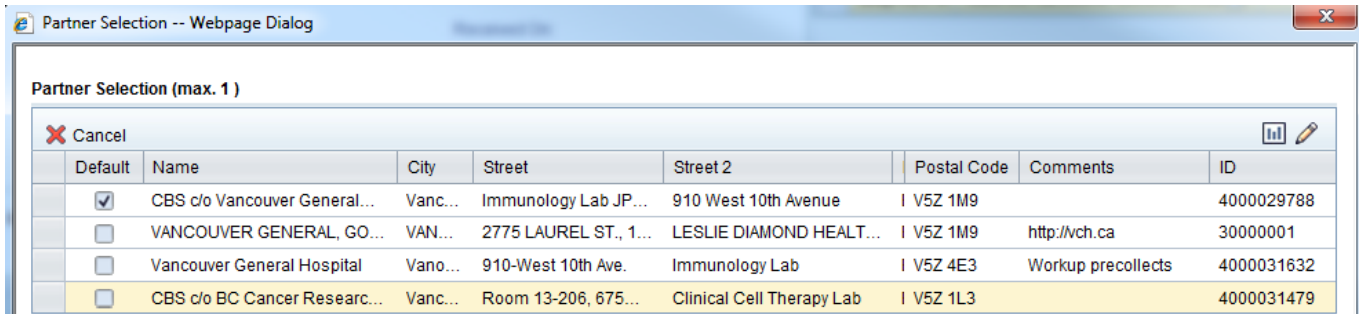
- 11) Click “Save”.
- 12) In the ‘Partners’ section, click on the “Ship-To Party” to verify that the shipping address matches the one on the activation request.

Partner Function	Partner Name
Created By	Jody Leece
CTC/IR	Vancouver General
OM Assigned Team	Activation Team
Patient	Susie Stemcell
Registrant/CBU	CBU CAC1000364986
Registry/CBB	OneMatch
Ship-To Party	Immunology Lab, Vancouver G...

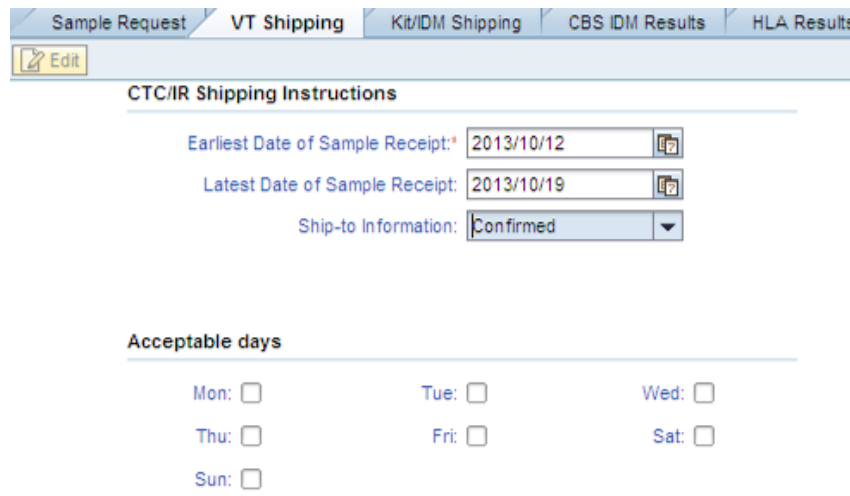
- 13) Click the “Back” button.
- 14) If the address displayed is correct, select “Confirmed” in the ‘Ship-to Information field’ in the ‘VT Shipping’ tab.
- 15) If the ship-to party displayed is not correct,
  - a. Highlight the ‘Ship-To party’ Line

Partner Function	Partner Name
Created By	Jody Leece
CTC/IR	Vancouver General
OM Assigned Team	Activation Team
Patient	Susie Stemcell
Registrant/CBU	CBU CAC1000364986
Registry/CBB	OM
Ship-To Party	Immunology Lab, Vancouver G...
Created By	

- b. Click the “Propose Alternatives” button



- c. If the address is not listed, click “Cancel”. Select “Change/Update required” in the ‘Ship-to Information field’ in the ‘VT Shipping’ tab.  
d. If the address is listed, check the correct address. Select “Confirmed” in the ‘Ship-to Information field’ in the ‘VT Shipping’ tab



- e. Click “Save”.

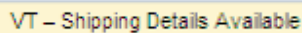
**Note: If an assessment is required, for Same Date of Birth (DOB), Exceeding Limit or for Low Match Grade, the status will be “On Hold” until a Registry Search Analyst can complete the assessment.**

### 7.2 Receive VT – Donor Information task

- 1) Receive task ‘VT – Donor Information’ if information is obtained from a registrant that requires vetting by the Canadian Transplant Centre (CTC).
- 2) Assign task.
- 3) Open the task to assess the donor information.
- 4) If required, request cancellation of the Verification Typing (VT) as per section 12.1 Request a cancellation.
- 5) Complete the task once the donor information assessment is completed.

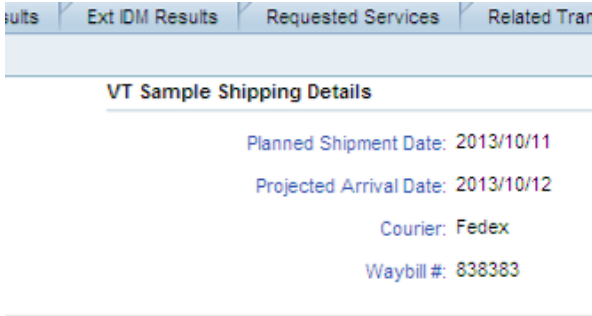
### 7.3 Receiving registrant VT shipping details

- 1) Receive task “VT- Shipping Details available”.



VT – Shipping Details Available

- 2) Assign task and open Verification Typing (VT) activation.
- 3) Click on the ‘VT Shipping’ tab to view the Verification Typing (VT) Sample Shipping Details.



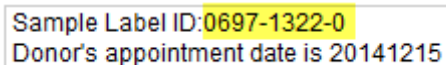
Results | Ext IDM Results | Requested Services | Related Tran

**VT Sample Shipping Details**

Planned Shipment Date: 2013/10/11  
Projected Arrival Date: 2013/10/12  
Courier: Fedex  
Waybill #: 838383

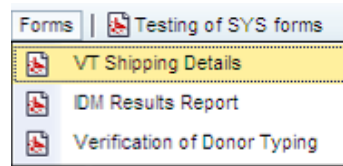
**Note:** For EMDIS registrants, *Sample Label ID* provided in the shipping details via EMDIS message can be viewed in the ‘VT Shipping’ tab of the Verification Typing (VT) activation itself under Special Instructions:

#### Special Instructions



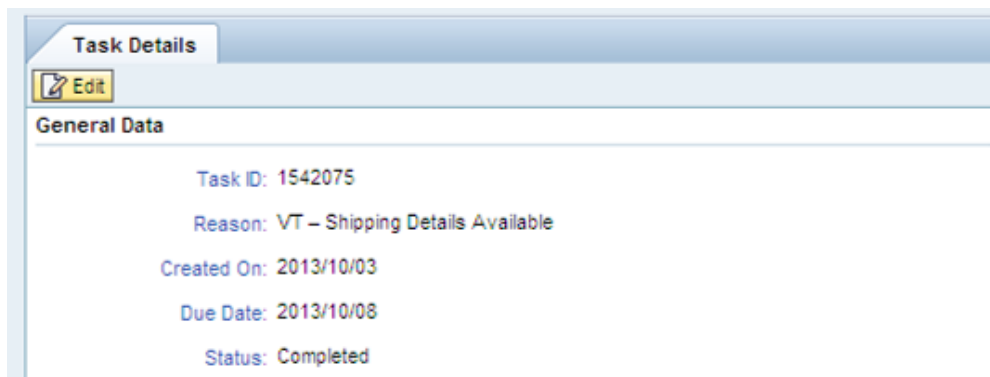
Sample Label ID: 0697-1322-0  
Donor's appointment date is 20141215

- 4) Click “Forms” button and select “VT Shipping details” to print the details.



**Note:** For EMDIS registrants, *Sample Label ID* provided in the shipping details via EMDIS message is not included in the ‘VT Shipping Details’ printable form.

- 5) Return to task and click “Set to Complete”.



### 7.4 Entering registrant Verification Typing results

**Note:** If Verification Typing (VT) results are not going to be provided for a registrant, request via a follow-up task that the Activation Team terminate the Verification Typing (VT) by setting the reservation ends on date to the current date.

If previously reported HLA results are amended for a registrant, a follow-up task will need to be created to the Search Analysts indicating that results have been altered.

If How to Proceed of Reserve was previously requested and the activation status is Fulfilled, the Verification Typing (VT) reservation can be terminated by changing How to Proceed to Release.

Once the Verification Typing (VT) sample has been received and tested, the results need to be entered into the activation. A reminder task “Activation – Results Reminder” will be sent 45 days after the projected arrival date if results have not been provided.

- 1) Open the Verification Typing (VT) Activation.
- 2) Click on the ‘HLA Typing’ tab.
- 3) Click “Edit”.

The screenshot shows a software interface with a tabbed menu at the top. The 'HLA Results' tab is selected. Below the menu is a toolbar with an 'Edit' button. The main area contains two columns of input fields. The left column has fields for A\*, B\*, C\*, DRB1\*, DRB3\*, DRB4\*, and DRB5\*. The right column has fields for DQA1\*, DQB1\*, DPA1\*, DPB1\*, HLA Test Date (with a calendar icon), and HLA Lab.

4) Enter the typing results and testing method.

Sample Request | VT Shipping | Kit/DM Shipping | CBS IDM Results | **HLA Results** | Ext

Edit

A\*: 01:VYJT | 01:VYJT  
 B\*: 08:WCNZ | 27:WCPF  
 C\*: 02:WDPD | 07:XFVC  
 DRB1\*: 03:TEYM | 04:04  
 DRB3\*: |  
 DRB4\*: |  
 DRB5\*: |

SBT | PCR-SSP | PCR-SSO | Other

Class I:      
 Class II:

5) Enter the 'HLA Test Date' and 'HLA Lab'.

HLA Test Date: 2013/10/03

HLA Lab: ABC Lab

6) In the 'Conclusion' area, enter how to proceed.

**Conclusion**

How to proceed:

Release Reason:

Other Reason:

Reserve Comments:

Timeline:

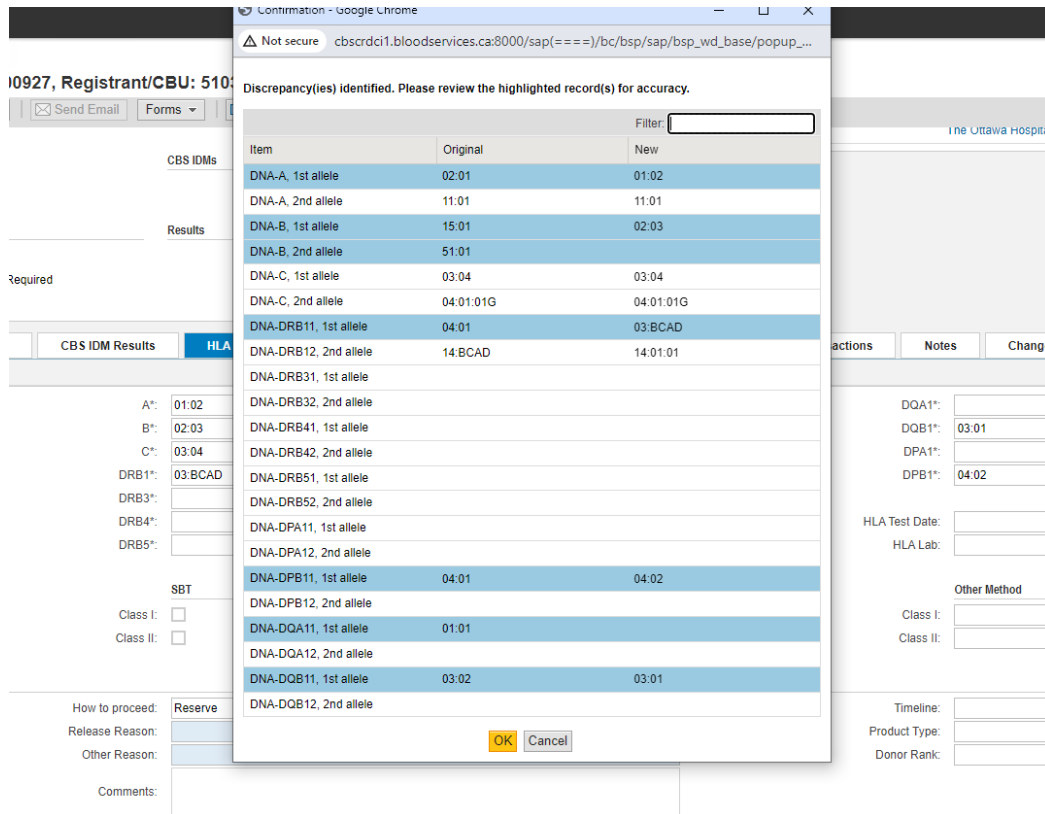
Product Type:

Donor Rank:

If 'How to proceed' is...	Then...
Reserve,	Timeline, Product Type and Donor Rank should be entered. <b>Note: Canadian Registrants will be reserved for an additional 3 months.</b> Enter any reservation comments.
Release,	Select "Release Reason"

**Note: If planning to proceed with a Work-up request, select to "Reserve" the registrant and make a note that you will be proceeding to work-up.**

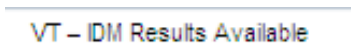
- 7) Attach any Infectious Disease Marker (IDM) results completed by your laboratory that you need to report to the activation. Send a follow up task to the registry Case Manager to notify them of the reported results.
- 8) Click “Save”.
- 9) A confirmation screen will appear to verify the HLA data entry. Any discrepancies between the values entered and the current donor/CBU HLA will be highlighted, for example:



- 10) Click “OK” if the information is correct or “Cancel” if changes need to be made.

### 7.5 Receiving Infectious Disease Marker (IDM) results

- 1) Receive task “VT – IDM Results Available”.

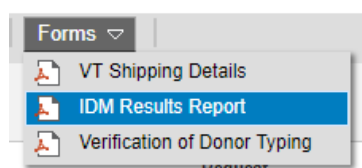


- 2) Assign and open task.
- 3) Open activation.
- 4) Review results:

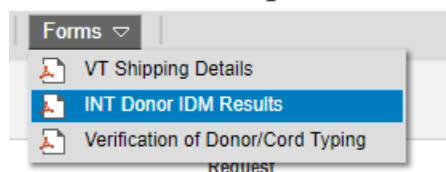
<b>If results from...</b>	<b>Then review results in...</b>
Canadian Blood Services	'CBS IDM Results' tab
EMDIS	'Ext IDM Results' tab
Fax International	'Attachments' tab

- 5) The Canadian Blood Services and EMDIS Infectious Disease Marker (IDM) results can be printed as per below. Fax International results must be printed using the Infectious Disease Marker (IDM) results report provided by the International Registry (located in the Attachments tab).
  - a. Click the Forms button
  - b. Select "IDM Results Report" for Canadian Blood Services results, or "Int IDM Results Report" for EMDIS Infectious Disease Marker (IDM) results

For Canadian:



For EMDIS:



**Note:** 'IDM Results Reports' are to be used only after the Infectious Disease Marker (IDM) results have been provided.

- 6) Set task to 'Completed'.

## **7.6 Receiving Cord Blood Unit (CBU) Verification Typing (VT) results**

When Cord Blood Unit (CBU) Verification Typing (VT) results are available, a notification task will be sent. If post-thaw testing was also requested with a Canadian Cord Blood Unit (CBU) Verification Typing (VT), a separate task will be issued when the post-thaw results are available.

- 1) Receive task "VT- HLA Results Available".

VT – HLA Results Available

- 2) Assign and open task.
- 3) Open the Verification Typing (VT) activation from the 'Related Transactions' tab.

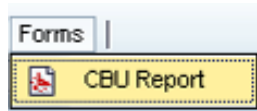


Related Transactions		
Transaction ID	Transaction Type	Description
8000004589	CDN VT, CBU	CDN VT, CBU

4) Canadian Cord Blood Unit (CBU) results can be viewed on the ‘VT Results’ tab.

VT Results	Requested Services	Related Transactions	Notes
		A*: 02:01	26:01
		B*: 07:02	40:06
		C*: 07:02	15:02
		DRB1*: 14:04	15:01
		DRB3*:	
		DRB4*:	
		DRB5*:	

Or can be printed using the Cord Blood Unit (CBU) Report found by clicking the “Forms” button and selecting “CBU Report”.



5) International Cord Blood Unit (CBU) results can be viewed in ‘Attachments’ tab.

## 8 Miscellaneous sample

Miscellaneous samples can be requested for Cord Blood Units (CBUs) or registrants when a Transplant Centre would like to perform additional typing or testing.

### 8.1 Requesting a miscellaneous sample

- 1) Open patient profile.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

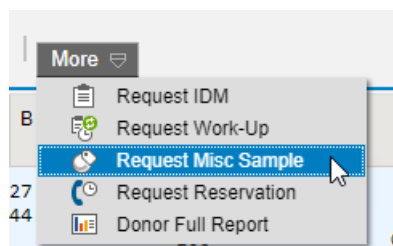
**Note: If donor does not have a GRID or donor or CBU is not available in the WMDA search results, use FAX International search request**

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 4) Search results will appear.
- 5) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the cord blood unit or registrant, if not already listed.
- 6) Highlight the registrant or Cord Blood Unit (CBU) for activation.

N	M/P/V	MC	Co	ION	GRID	Age	Sex	Race	Avail. Status	Since CMV	ABO Height	Weight	Match	A	pA	B	pB	C	pC	DRB1	pDR	DOB1	pDQ
34	0/0/0	CA	5103	5103	0001 0008 0390 827	49	F	CAU	2011-03	AV	173	59	0/0/55	(26:GKHG) 32:GPBM	0	27:GPXP 44:GPYG	100	0	12:EKFZ 15:GPHD	100	87		
1	0/0/-	DE	5525	6939	DKH0 0025 3262 533	66	F	CAU	AV				0/1/46	(25:XX) 29:AZRC	0	27:XX 44:XX	77	2	12:RDT 15:XX	95	90		

- 7) Click on “More” and select “Request Misc Sample”.



- 8) The ‘CDN Misc Sample’ activation screen opens.

- 9) For a CBU misc sample activation, select the requested Type of Sample from the “Request Type” field.

The screenshot shows a web form titled "CDN Misc. Sampl, CBU: New". It has a toolbar with "Save", "Cancel", "Cancel by OM", and "Follow-Up Task" buttons. Below the toolbar is an "Edit" button. The form is divided into two main sections: "General Data" and "Request".

**General Data:**

- Description: CDN Misc. Sample, CBU
- Request Method: Fax
- Com. Method: Internal
- Request Type: Attached Segment (selected from a dropdown menu)
- Request to Cancel: Attached Segment
- Status: Attached Segment
- Reason: Attached Segment
- Requested On: [empty field]

**Request:**

- Request Created On: 2013/12/09
- Acknowledged by IR On: [empty field]
- Reservation Ends On: 2014/02/07
- Sent On: [empty field]

**Note: Only 1 Type of Sample can be selected per request.**

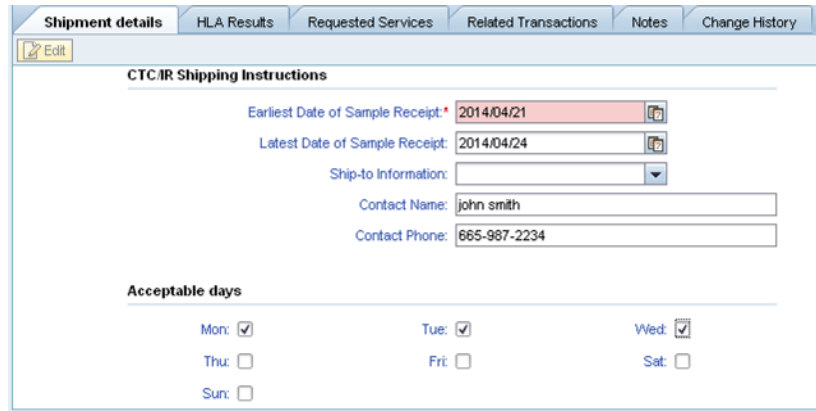
- 10) For a registrant miscellaneous sample activation, enter the volumes required in the ‘Sample Request’ tab.

The screenshot shows a software interface with a "Sample Request" tab selected. Below the tab is an "Edit" button. The main area contains a table with the following data:

Product Type	Quantity	Volume (ml)
Clotted Blood:	0	0
ACD-A:	0	0
EDTA:	0	0
Heparin:	0	0
Total Volume:		0
Total Allowed for Registry:		50

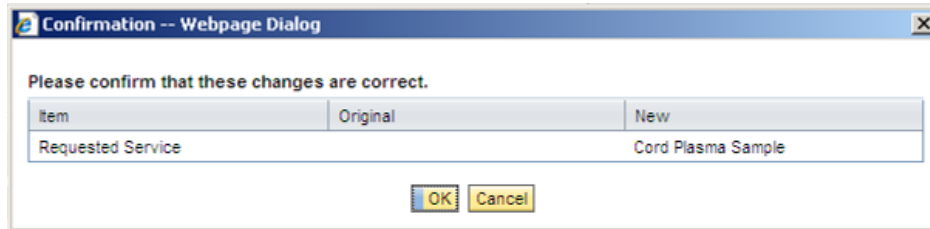
**Note: “Total volume” cannot exceed “Total Allowed for Registry”.**

- 11) In the “Shipping Details” tab, enter the ‘CTC/IR Shipping Instructions’:
- a. Earliest Date of Sample Receipt
  - b. Latest Date of Sample Receipt, if applicable
  - c. Contact Name (Canadian Cord only)
  - d. Contact Phone (Canadian Cord only)
  - e. Acceptable days, if applicable.



The screenshot shows a web application interface with a tabbed menu at the top: 'Shipment details', 'HLA Results', 'Requested Services', 'Related Transactions', 'Notes', and 'Change History'. The 'Shipment details' tab is active, and there is an 'Edit' button. Below the tab, the section is titled 'CTC/IR Shipping Instructions'. It contains several input fields: 'Earliest Date of Sample Receipt' (2014/04/21), 'Latest Date of Sample Receipt' (2014/04/24), 'Ship-to Information' (a dropdown menu), 'Contact Name' (john smith), and 'Contact Phone' (665-987-2234). Below these fields is a section titled 'Acceptable days' with checkboxes for each day of the week: Mon (checked), Tue (checked), Wed (checked), Thu (unchecked), Fri (unchecked), and Sat (unchecked). Sun is also present but unchecked.

- 12) Click “Save”.
- 13) A confirmation window opens to have the user verify the entry. If this is correct click “OK” if it is not and changes need to be made, click “Cancel”.



The screenshot shows a dialog box titled 'Confirmation -- Webpage Dialog'. It contains the text 'Please confirm that these changes are correct.' Below this is a table with three columns: 'Item', 'Original', and 'New'. The table has one row with the following data: 'Requested Service', 'Original', and 'Cord Plasma Sample'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- 14) Status will change to “On Hold” with reason as “Ship-to not Confirmed”.

Status: On Hold  
Reason: Ship-To Not Confirmed

- 15) In the ‘Partners’ section, click on the “Ship-To Party” to verify that the shipping address matches the one on the activation request.

Partner Function	Partner Name
Created By	Jody Leece
CTC/IR	Vancouver General
OM Assigned Team	Activation Team
Patient	Susie Stemcell
Registrant/CBU	CBU CAC1000364986
Registry/CBB	OneMatch
Ship-To Party	Immunology Lab, Vancouver G...

- 16) Click the “Back” button.
- 17) If the address displayed is correct, select “Confirmed” in the ‘Ship-to Information field’ in the ‘Shipping Details’ tab.
- 18) If the ship-to party displayed is not correct,
  - a. Select the ‘Ship-To party’ Line.

Partner Function	Partner Name
Created By	Jody Leece
CTC/IR	Vancouver General
OM Assigned Team	Activation Team
Patient	Susie Stemcell
Registrant/CBU	CBU CAC1000364986
Registry/CBB	OM
Ship-To Party	Immunology Lab, Vancouver G...
Created By	

- Click the “Propose Alternatives” button.

Default	Name	City	Street	Street 2	Postal Code	Comments	ID
<input checked="" type="checkbox"/>	CBS c/o Vancouver General...	Vanc...	Immunology Lab JP...	910 West 10th Avenue	I V5Z 1M9		4000029788
<input type="checkbox"/>	VANCOUVER GENERAL, GO...	VAN...	2775 LAUREL ST., 1...	LESLIE DIAMOND HEALT...	I V5Z 1M9	http://vch.ca	30000001
<input type="checkbox"/>	Vancouver General Hospital	Vano...	910-West 10th Ave.	Immunology Lab	I V5Z 4E3	Workup precollects	4000031632
<input type="checkbox"/>	CBS c/o BC Cancer Researc...	Vanc...	Room 13-206, 675...	Clinical Cell Therapy Lab	I V5Z 1L3		4000031479

- If the address is not listed, click “Cancel”
- If the address is listed, select the address.

- 19) Click the “Edit” button in the ‘Shipping Details’ tab.

20) Select:

- a. “Create/Update Required” if address was not listed and the registry needs to add it
- b. “Confirmed” if the correct address is in the system.

Earliest Date of Sample Receipt: 2013/01/29  
Latest Date of Sample Receipt: 2013/02/09  
Ship-to Information:  
Contact Name: Confirmed  
Create/Update Required  
Contact Phone:

21) Enter the Contact Name and Contact Phone number of the shipping contact person.

22) Click “Save”.

## 8.2 Receiving miscellaneous sample shipping details

1) Receive task “Misc Sample- Shipping Details Available”.

Misc Sample – Shipping Details Available

2) Assign task and open ‘Misc sample’ activation.

3) Click on the ‘Misc Sample Shipping Details’ tab to view the shipping details.

Misc. Sample Shipping Details  
Planned Shipment Date: 2013/12/16  
Projected Arrival Date: 2013/12/17  
Courier: World Courier  
Waybill #: 5656

4) Click “Forms” button and select “Sample Shipping details” to print a copy of the details.

Forms |  
Sample Shipping Details  
Verification of Cord Typing

- 5) Return to task and click “Set to Complete”.

**Task Details**

[Edit](#)

**General Data**

Task ID: 1733763

Reason: Misc Sample – Shipping Details Available

Created On: 2013/12/12

Due Date: 2013/12/17

Status: Completed

### 8.3 Entering miscellaneous sample results

HLA typing results from a miscellaneous sample can be entered directly into the misc sample activation. All other test results are to be attached.

#### 8.3.1 HLA typing results

- 1) Open activation.
- 2) Click on the “HLA Results” tab.
- 3) Click “Edit”.
- 4) Enter the HLA results, HLA typing method, ‘HLA Test Date’ and ‘HLA Lab’.

**HLA Results** | Requested Services | Related Transactions | Notes

A*:	<input type="text" value="02:01"/>	<input type="text" value="11:01"/>	DQA1*:	<input type="text"/>
B*:	<input type="text" value="15:01"/>	<input type="text" value="15:01"/>	DGB1*:	<input type="text"/>
C*:	<input type="text" value="03:04"/>	<input type="text" value="03:04"/>	DPA1*:	<input type="text"/>
DRB1*:	<input type="text" value="04:01"/>	<input type="text" value="04:01"/>	DPB1*:	<input type="text"/>
DRB3*:	<input type="text"/>	<input type="text"/>		
DRB4*:	<input type="text"/>	<input type="text"/>	HLA Test Date:	<input type="text" value="2014/01/06"/>
DRB5*:	<input type="text"/>	<input type="text"/>	HLA Lab:	<input type="text"/>

	SBT	PCR-SSP	PCR-SSO	Other	Other Method
Class I:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Class II:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

- 5) Click “Save”.
- 6) A confirmation window will appear for the user to verify the entries. Any discrepancies between the values entered and the current donor/CBU HLA will be highlighted, for example:

Discrepancy(ies) identified. Please review the highlighted record(s) for accuracy.

Item	Original	New
DNA-A, 1st allele	02:01	01:02
DNA-A, 2nd allele	11:01	11:01
DNA-B, 1st allele	15:01	02:03
DNA-B, 2nd allele	51:01	
DNA-C, 1st allele	03:04	03:04
DNA-C, 2nd allele	04:01:01G	04:01:01G
DNA-DRB11, 1st allele	04:01	03:BCAD
DNA-DRB12, 2nd allele	14:BCAD	14:01:01
DNA-DRB31, 1st allele		
DNA-DRB32, 2nd allele		
DNA-DRB41, 1st allele		
DNA-DRB42, 2nd allele		
DNA-DRB51, 1st allele		
DNA-DRB52, 2nd allele		
DNA-DPA11, 1st allele		
DNA-DPA12, 2nd allele		
DNA-DPB11, 1st allele	04:01	04:02
DNA-DPB12, 2nd allele		
DNA-DQA11, 1st allele	01:01	
DNA-DQA12, 2nd allele		
DNA-DQB11, 1st allele	03:02	03:01
DNA-DQB12, 2nd allele		

OK Cancel

7) Click “OK” if the information is correct or “Cancel” if changes need to be made.

### 8.3.2 Other test results

- 1) Open activation.
- 2) Click ‘Attachments’ tab.
- 3) Attach the HLA results.
- 4) Click “Save”.
- 5) Send a follow-up task to the Activations Team to notifying them of the attached non-HLA test results.

**Note: The registrant or Cord Blood Unit (CBU) is released upon reporting of the miscellaneous sample results.**



## 9 Reservation

### 9.1 Requesting a reservation

- 1) Open Patient profile.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

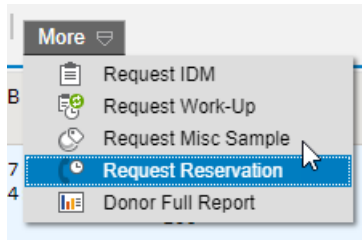
**Note: If donor does not have a GRID or donor or CBU is not available in the WMDA search results, use FAX International search request**

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

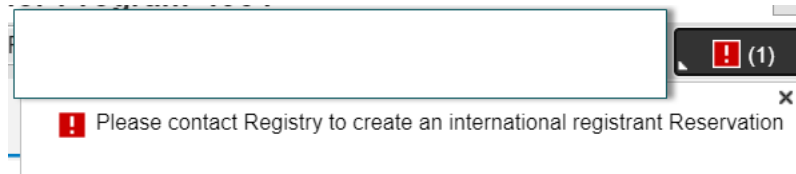
- 4) Search results will appear.
- 5) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the cord blood unit or registrant, if not already listed.
- 6) Highlight the registrant or Cord Blood Unit (CBU) for activation.

N	MP/V	MC	Co	ION	GRID	Age	Sex	Avail. Since	ABO	Match	A	pA	B	pB	C	pC	DRB1	pDR	DQB1	pDQ
34	0/0/0	CA	5103	5103 0001 0008 0390 827	49	F	2011-03	AV	173	0/0/55	(26:GKHG) 32:GPHH	0	27:GPXP 44:GPYG	100	0	12:EKFZ 15:GPHD	100		87	
1	0/0/-	DE	5525	6939 DKH0 0025 3262 533	66	F	AV		0/1/46	(25:XX) 29:AZRC	0	27:XX 44:XX	77	2	12:RDT 15:XX	95		90		

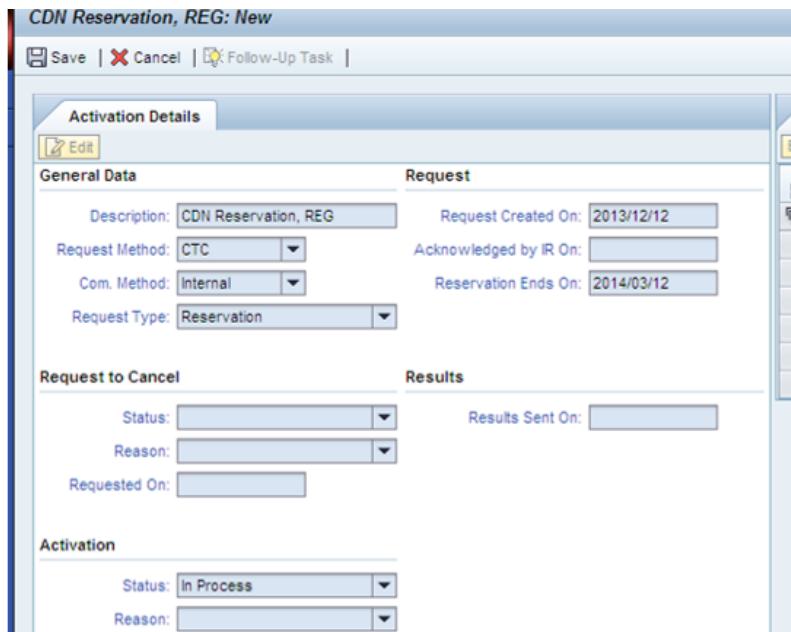
7) Click on “More” and select “Request Reservation”.



**Note:** For international registrant reservation requests, send a follow-up task to the Activations team. Otherwise, the following error will be returned:



8) Reservation Screen will open.



9) Click “Save”.

## 9.2 Reservation notification

- 1) Receive task ‘Activation – Reservation Confirmed’.

Activation – Reservation Confirmation

- 2) Assign and open task.
- 3) From the ‘Related Transactions’ tab, open the Reservation activation.

Related Transactions		
Transaction ID	Transaction Type	Description
8000006154	INT Reservation, CBU	INT Reservation, CBU

- 4) Review the ‘Reservation Ends On’ date in the ‘Request’ section of the ‘Details’ tab.

**Note: For international reservations the period may be different than 3 months.**

### Request

Request Created On: 2013/12/09

Request Sent On: 2013/12/09

Acknowledged by IR On: 2013/12/09

Reservation Ends On: 2014/03/09

## 9.3 Extending a reservation

Reservations cannot be extended. If you need to reserve a registrant/ Cord Blood Unit (CBU) for a longer time period, a new reservation will need to be initiated.

A task “Activation- Reservation Expiry Reminder” will be sent 1 week prior to the reservation end date.

## 10 Infectious Disease Markers (IDM)

### 10.1 Requesting ‘IDM Only’

- 1) Open Patient profile.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

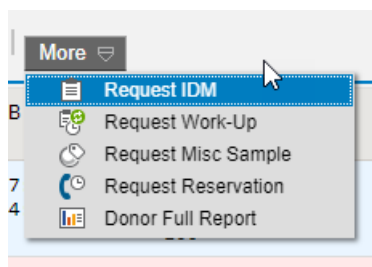
**Note: If donor does not have a GRID or donor or CBU is not available in the WMDA search results, use FAX International search request**

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 4) Search results will appear.
- 5) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the cord blood unit or registrant, if not already listed.
- 6) Highlight the registrant or Cord Blood Unit (CBU) for activation.

N	M/P/V	MC	Co	ION	GRID	Age	Sex	Race	Avail. Since	Status	CMV	ABO	Height	Weight	Match	A	pA	B	pB	C	pC	DRB1	pDR	DOB1	pDQ	
34	0/0/0	CA	5103	5103	0001 0008 0390 827	49	F		2011-03	AV		173	59		M P P P P (26:GKHG) 0/0/55 32:GPBH		27:GPXP 44:GPYG		100			12:EKFZ 15:GPHD		100		87
1	0/0/-	DE	5525	6939	DKH0 0025 3262 533	66	F			AV					M P P P P (25:XX) 0/1/46 29:AZRC		27:XX 44:XX		77		2	12:RDT 15:XX		95		90

- 7) Click on “More” and select “Request IDM”.



- 8) For International Registry requests select the type of Infectious Disease Marker (IDM) typing required.

The screenshot shows a web application window titled "INT IDM, REG: New". At the top, there are "Save" and "Cancel" buttons. Below is a section titled "IDM Requests" with two columns of options:

For Registrant/Cord	For Cord only
IDMs: <input type="checkbox"/>	TOXOPLASMOSIS: <input type="checkbox"/>
CMV: <input type="checkbox"/>	EPSTEIN BARR VIRUS: <input type="checkbox"/>
ABO-Rh: <input type="checkbox"/>	AST & ALT: <input type="checkbox"/>
	NAT HIV: <input type="checkbox"/>
	NAT HCV: <input type="checkbox"/>
	NAT HBV: <input type="checkbox"/>

**Note:** The “IDMs” option is used to request the registry’s full Infectious Disease Marker (IDM) package.

**Note:** The options available will depend on type of activation (Cord Blood Unit (CBU) or Registrant) and the registry supported services.

- 9) Click “Save”.
- 10) A confirmation window will appear. Click “Ok” to confirm or “Cancel” to make modifications.

The screenshot shows a "Confirmation - Webpage Dialog" window. It contains the following text and table:

Please confirm that these changes are correct.

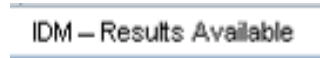
Item	Original	New
IDMS		X

At the bottom of the dialog are "OK" and "Cancel" buttons.

**10.2 Receiving Infectious Disease Marker (IDM) results**

A task will be sent when Infectious Disease Marker (IDM) results are available.

- 1) Receive task “IDM – results available”.



- 2) Assign and open task.
- 3) From the ‘Related Transactions’ tab, open the ‘IDM’ activation.

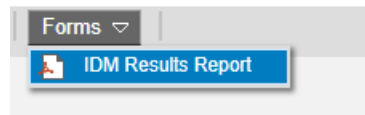
Related Transactions		
Transaction ID	Transaction Type	Description
800005528	INT IDM, CBU	INT IDM, CBU

- 4) Canadian or EMDIS Infectious Disease Marker (IDM) results can be viewed in the ‘IDM Results’ tab.

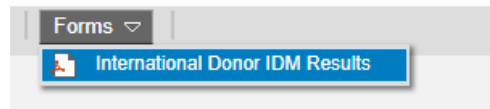
IDM Results	Requested Services	Related Transactions	Notes
	ABORh: AB+		anti-CMV: Both IgG and IgM negative
	CMV:		anti-CMV Date: 2020/03/17
	CMV Date:		CMV NAT:
	Toxoplasmosis: Both IgG and IgM negative		CMV NAT Date:
	EBV: IgG or IgM positive		anti-HIV:
	HIV:		HIV NAT:
	HIV p24 antigen: Negative		HBV NAT:
	HBsAg: Negative		HCV NAT:
	anti-HBs:		anti-HEV:
	anti-HBc: Negative		HEV NAT:
	anti-HCV: Negative		WNV NAT:
	Syphilis: Negative		anti-Chagas:
	ALT (u/l): 13		Chagas NAT:
	anti-HTLV I/II: Positive		CCR5:
			Parvo B19 NAT:
	Remarks		

Canadian or EMDIS Infectious Disease Marker (IDM) results can be printed using the applicable 'IDM Results Report' found by clicking the "Forms" button and selecting the "IDM Results Report" for Canadian results or the "International IDM Results Report" for EMDIS results.

For Canadian:



For EMDIS:



**Note: 'IDM Results Reports' are to be used only after the Infectious Disease Marker (IDM) results have been provided.**

- 5) Results from a non-EMDIS International Registry (IR) will be in an attached document reviewed and printed in the 'Attachments' tab.



## 11 Post-thaw

### 11.1 Requesting post-thaw

- 1) Open patient profile.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

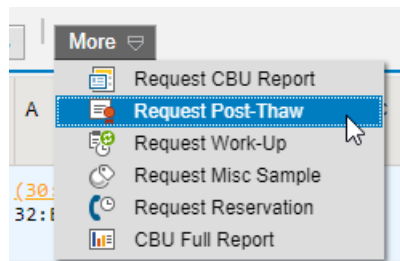
**Note: If CBU is not available in the WMDA search results, use FAX International search request**

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 4) Search results will appear.
- 5) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the cord blood unit the post-thaw is requested for, if not already listed.
- 6) Highlight the cord blood unit.

N	VT	MC	Co	ION	ID	Status	MNC	TNC	Age	Vol.	Match	A	B	C	pC	DRB1	pDR	DQB1
1	-	FR	1804	FRCEH0B0000001642	AV	AV	2.6	123.1	11	26	0 / 1 / 2 (%)	(30:BSXX)	27:REDU			12:PYnD		
2	-	US	8691	204681	AV	P 2002-10		66.0	21	25	0 / 0 / 59	(24s)	27s	44s	81	15:01	12:01	100

- 7) Click on the “More” button and select “Request Post-Thaw”.





- 8) The post-thaw activation screen will appear.

The screenshot shows a web-based form titled "CDN Post-Thaw, CBU: New". At the top, there are navigation buttons: Save, Cancel, Cancel by OM, Cancel by Registry/CBB, and Follow-Up Task. Below this is a tabbed interface with "Activation Details" selected. The form is organized into several sections:

- General Data:** Includes fields for Description (CDN Post-Thaw, CBU), Request Method (Fax), Com. Method (Internal), and Request Type (POST THAW).
- Request:** Includes fields for Request Created On (2013/12/09), Acknowledged by IR On, and Reservation Ends On (2014/01/08).
- Request to Cancel:** Includes fields for Status, Reason, and Requested On.
- Results:** Includes a field for Results Sent On.
- Activation:** Includes fields for Status (In Process) and Reason.

- 9) For an international Cord Blood Unit (CBU), enter the 'Requested Tests' in the 'Requested Details' tab.

The screenshot shows a web-based form with three tabs: "Request Details", "Requested Services", and "Related Transactions". The "Request Details" tab is active. Below the tabs is an "Edit" button. The main section is titled "Requested Tests" and contains a large text input field with the placeholder text "Enter requested tests here."

**Note: This activation types can be used to request any unusual requests that the International Registry / Cord Blood Bank (IR/CBB) agrees to perform (for example fungal cultures).**

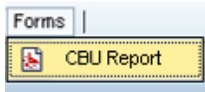
- 10) Click "Save".

**11.2 Receiving post-thaw results**

- 1) Receive task “Post-Thaw – Post-Thaw Results Available”.

**Post-Thaw – Post-Thaw Results Available**

- 2) Assign task to yourself.
- 3) Open task.
- 4) Open related transactions – Post-Thaw, Verification Typing (VT) or Work-up request.
- 5) Review results:

For:	Then view results:
Canadian Cord Blood Unit (CBU)	In the ‘CBU Report’ found in the forms tab. 
International Cord Blood Unit (CBU)	In the ‘Attachment’ tab

- 6) Set task to completed.

## 12 Work-Up

### 12.1 Requesting a registrant work-up

**Note:** If the work-up request is for an additional donation for the same registrant/patient refer to Step 11.2 for instructions.

- 1) If a Verification Typing (VT) was requested for this donor, ensure that the HLA typing results have been entered.
- 2) Open patient profile.
- 3) Click on the ‘Search Requests’ tab.
- 4) Click on the ‘SR ID’ of the desired search request.

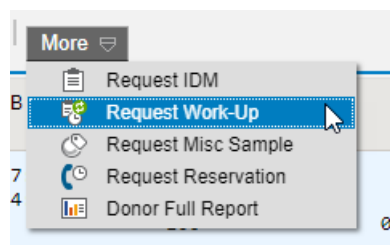
**Note:** If donor does not have a GRID or is not available in the WMDA search results, use FAX International search request

SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 5) Search results will appear.
- 6) For FAX international search requests, refer to **3.9 Managing entries on Fax International searches** to add the registrant, if not already listed.
- 7) Highlight the registrant for activation.

N	M/P/V	MC	Co	ION	GRID	Age	Sex	Race	Avail	Since	Status	CMV	ABO	Height	Weight	Match	A	pA	B	pB	C	pC	DRB1	pDR	DQB1	pDQ	
34	0/0/0		CA	5103	5103 0001 0000 0390 827	49	F	CAU	2011-03	AV	173	59		0/1/2 (%)	0/0/55	(26:GKHG)	27:GPXP	44:GPYG		100			12:EKFZ	15:GPIID		100	87
1	0/0/-		DE	5525	6939 DKM0 0025 3262 533	66	F	CAU		AV				0/1/46	29:AZRC	(25:XX)	27:XX	44:XX		77		2	12:RDT	15:XX		95	90

- 8) Click on “More” and select “Request Work-Up”.



9) In the ‘Request Type’ field, select the 1<sup>st</sup> choice of product requested.

**Note: If the product to be collected changes, the ‘Request Type’ needs to be updated accordingly.**

10) In the ‘Work-up Details’ tab, complete the ‘Requested Details’ as appropriate.

- ‘Additional Work-Up’ – check if this is a second/ subsequent donation request
- ‘Simultaneous VT’ – check if a Verification Typing (VT) will be performed with the work-up using the precollect samples
- ‘Research Request’ – check if research request is included
- ‘Cryo Request’ – check if cryopreservation of the entire product is requested.

11) Click on ‘Patient HLA’ tab.

- 12) Verify the Patient HLA reflects the verification typing completed and the HLA test date is entered. Update any typing changes for the patient in the patient profile.

Patient HLA	Reg VT Results	IDMs	Post-Collection	Requested Services	Related Transactions	Notes
A*	01:01		02:06			DQA1*:
B*	35:03		51:01			DQB1*:
C*	01:02		04:01			DPA1*:
DRB1*	01:01		14:04			DPB1*:
DRB3*:						
DRB4*:						
DRB5*:						
						HLA Test Date: 2014/02/03

- 13) Click on ‘Reg VT Results’ tab.  
 14) The last Verification Typing (VT) results for the Registrant will appear. If a simultaneous Verification Typing (VT) was requested, these values will be removed once the activation is saved. If no previous Verification Typing (VT) was completed, this tab will be blank.

Reg VT Results	IDMs	Post-Collection	Requested Services	Related Transactions	Notes	
A*	01:VYJT		01:VYJT		DQA1*:	
B*	08:WNCNZ		27:WCPF		DQB1*:	
C*	02:WDPD		07:XFVC		DPA1*:	
DRB1*	03:TEYM		04:04		DPB1*:	
DRB3*:						
DRB4*:						
DRB5*:						
						HLA Test Date: 2013/10/03
						HLA Lab: ABC Lab
		<b>SBT</b>	<b>PCR-SSP</b>	<b>PCR-SSO</b>	<b>Other</b>	<b>Other Method</b>
Class I:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Class I: <input type="text"/>
Class II:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Class II: <input type="text"/>

- 15) Click “Save”.  
 16) Generate the applicable work-up request form from the Work-Up by clicking the “Forms” button and selecting:  
 a. ‘Work-Up Request and Prescription’ to generate the ‘Work-Up Request and Prescription for HPC-Marrow; HPC-Apheresis and/or MNC, Apheresis’ .  
 b. ‘Previous Transplant History’ to generate the ‘Previous Transplant History’ .  
 17) Click the ‘Attachments’ tab and attach completed work-up documents.  
 18) Click “save”.

**Note: If an assessment is required for Low Match Grade, the status will be “On Hold” until a Registry Search Analyst can complete the assessment.**

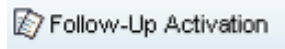
### 12.2 Requesting a subsequent/ additional registrant work-up

When a donor has one of the following statuses, it is not possible to request a work-up using the regular method. In this case, the request would have to be made through a previously completed activation with the same patient and registrant.

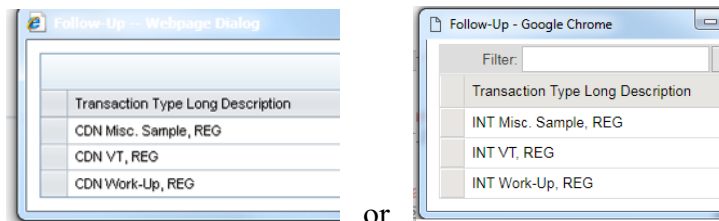
- Temporarily unavailable - Donated
- Unavailable – Donated Twice
- Unavailable – Overage
- Open completed activation

**If no previous activation exists, send request to the registry by fax.**

- 1) Click on the “Follow-Up Activation” button.



- 2) Select ‘CDN Work-Up, Reg’ or INT Work-Up Reg’.



- 3) The work-up will open. Continue with work-up request by following **Instruction 11.1 Steps 8-15**.

### 12.3 Requesting a Cord Blood Unit (CBU) work-up

- 1) Open patient profile.
- 2) Click on the ‘Search Requests’ tab.
- 3) Click on the ‘SR ID’ of the desired search request.

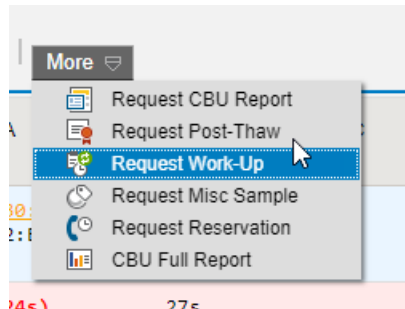
**Note: If CBU is not available in the WMDA search results, use FAX International search request**

Search Requests						
SR ID	SR Type	Requested IR/CBB	Status	Owner	Created On	Created By
1736238	WMDA Donor		Results Received	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA
1736619	WMDA CBU		In Process	Joeann Jimenez / Toronto ON M2J 3X1	2024/02/14	TSTCBUSA

- 4) Search results will appear.
- 5) For FAX International search requests, refer to **3.9 Managing entries on Fax International searches** to add the Cord Blood Unit, if not already listed.
- 6) Highlight the Cord Blood Unit (CBU) for activation.

N	VT	F	MC	Co	ION	ID	Status	CMV	Race	MNC	CD34+	CD34+*kg	TNC	TNC/kg	Age	Sex	ABO	Vol.	Viab.	Seg.	Match	A	pA	B	pB	C	pC	DRB1	pDR	DQB1
1	-	-	FR	1804	FRCBM080000001642	AV				2.6		123.1	11	M	A+	26					(30:BSXK)	27:REDU						12:PYND		100
2	-	-	US	8691	204681	AV				66.0		66.0	21	M	A+	25					(24s)	27s						15:01		100

- 7) Click on “More” and select “Request Work-Up”.



- 8) The Work-up screen appears. Complete the 'Request Details' in the 'Work-Up Details' tab.
- a. 'Multiple CBU transplant' – check if more than 1 Cord Blood Unit (CBU) is to be transplanted
  - b. '# of cords to be transplanted'- (editable if 'Multiple CBU transplant' is checked)
  - c. 'Requested Shipment Date'
  - d. 'Planned Infusion Date'
  - e. 'Planned Patient Prep Date'
  - f. 'Samples to be shipped with CBU'- check if requesting surplus available samples should be shipped with the Cord Blood Unit (CBU).

The screenshot shows a software interface with a tabbed menu at the top. The 'Work-Up Details' tab is selected and highlighted. Below the tabs is a toolbar with an 'Edit' button. The main content area is titled 'Request Details' and contains the following fields:

- Multiple CBU Transplant?:
- # of cords to be transplanted:
- Requested Shipment Date:
- Planned Patient Prep Date:
- Planned Infusion Date:
- Samples to be Shipped with CBU:

- 9) Click on 'Patient HLA' tab.



- 10) Verify the Patient HLA reflects the verification typing completed and the HLA test date is entered.

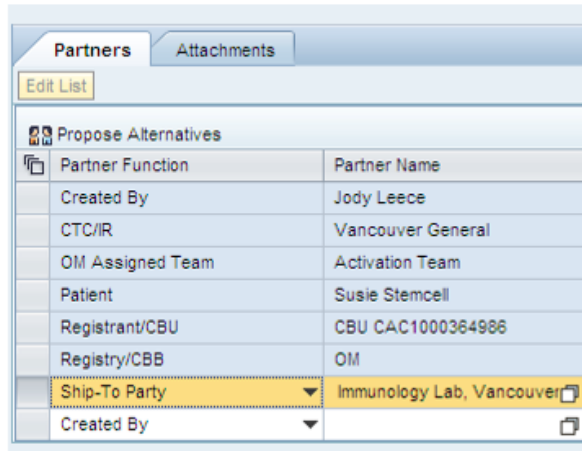
Patient HLA		Reg VT Results	IDMs	Post-Collection	Requested Services	Related Transactions	Notes
A*:	01:01		02:06				DQA1*:
B*:	35:03		51:01				DQB1*:
C*:	01:02		04:01				DPA1*:
DRB1*:	01:01		14:04				DPB1*:
DRB3*:							
DRB4*:							HLA Test Date: 2014/02/03
DRB5*:							

- 11) Click “Save”.
- 12) Generate the shipment request for a Canadian Cord Blood Unit (CBU) form from the Work-Up by clicking the “Forms” button and selecting:
- ‘Request for Shipment of CBU’ to generate the ‘Request for Shipment of Cord Blood Unit’ form.
- 13) Click the ‘Attachments’ tab and attach the completed work-up documents.
- 14) Click “Save”.
- 15) In the ‘Partners’ section, click on the “Ship-To Party” to verify that the shipping address matches the one on the request form.

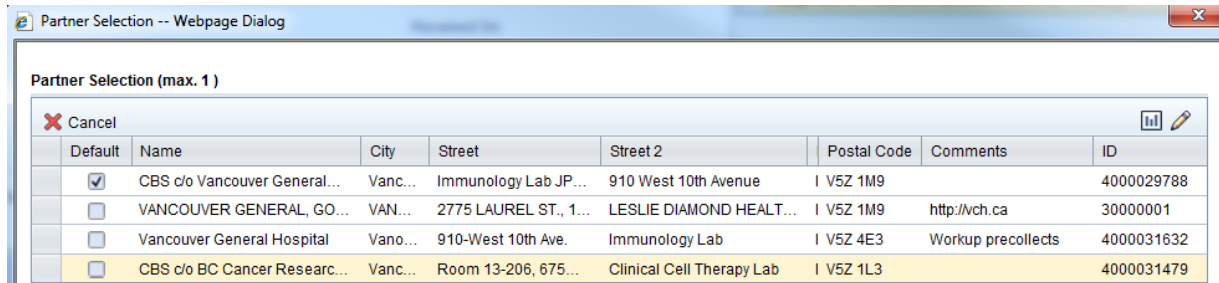
Partners		Attachments
<a href="#">Edit List</a>		
Partner Function	Partner Name	
Created By	Jody Leece	
CTC/IR	Vancouver General	
OM Assigned Team	Activation Team	
Patient	Susie Stemcell	
Registrant/CBU	CBU CAC1000364986	
Registry/CBB	OneMatch	
Ship-To Party	Immunology Lab, Vancouver G...	

- 16) Click the “Back” button.

- 17) If the ship-to party displayed is not correct,  
 a. Select the ‘Ship-To party’ Line



- Click the “Propose Alternatives” button

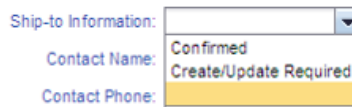


- If the address is listed, select address
- If address not listed, close window.

18) Click the “Edit” button in the ‘Shipment Details’ tab.

19) Select:

- “Create/Update Required” if address was not listed and the registry needs to add it
- “Confirmed” if the correct address is in the system.



20) Enter the Contact Name and Contact Phone number of the shipping contact person.

21) Click “Save” and close.

**Note: If an assessment is required for Low Match Grade, the status will be “On Hold” until a Registry Search Analyst can complete the assessment.**

### 12.4 Receive Work-up – Donor Information task

- 1) Receive task ‘Work-up – Donor Information’ if information is obtained from a registrant that requires vetting by the Canadian Transplant Centre (CTC).
- 2) Assign task.
- 3) Open the task to assess the donor information.
- 4) If required, request cancellation of the Work-up as per section 12.1 Request a cancellation.
- 5) Complete the task once the donor information assessment is completed.

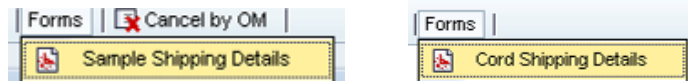
### 12.5 Receive shipping details

- 1) Receive task ‘Work-Up – Shipping Details Available’.
- 2) Open the related transaction.
- 3) Canadian registrant shipping details are found on the ‘Pre-Collect Shipping’ tab.

- 4) Cord Blood Unit (CBU) and International registrant shipping details are found on the ‘Shipment Details’ tab of the work-up for CBU and of the related Precollect transaction for registrant.

- 5) To view the details in a report format:
  - Click “Forms” button
  - Select “Sample Shipping Details” or “Cord Unit Shipping Details”.

**Note:** This will open a separate window that does not automatically pop up on your screen.



- 6) Return to task.
- 7) Complete task.

### ***12.6 Receiving facility qualification form***

- 1) Receive task “Work-Up – Facility Qualific. Available”.

Work-Up – Facility Qualific. Available

- 2) Assign task and open the task.
- 3) From the ‘Related Transactions’ tab, open the Work-Up activation.

Related Transactions		
Transaction ID	Transaction Type	Description
8000007883	CDN Work-Up, REG	CDN Work-Up, REG

- 4) The Facility Qualification Form is found in the ‘Attachments’ tab.
- 5) Set task to completed.

### ***12.7 Receive and confirm Work-up collection schedule (registrants)***

- 1) Receive task “Work-Up- Schedule Confirmation”.

**Note:** At this point, the Collection Date on the Work-up Details tab will reflect the Collection Day 1 date from the collection schedule.

- 2) Assign and open task.

Task Notification: 1841738, Patient: CAP7000000695, Registrant/CBU: CAR1000084285

Save and Back | Save | Cancel | Set to Completed | Follow-Up Task | Assign Owner

**Details**

Edit

**General Data**

Task ID: 1841738

Reason: Work-Up – Schedule Confirmation

Created On: 2014/02/06

Due Date: 2014/02/11

Status: In Process

**Description**

**Related Transactions** | Change History

Transaction ID	Transaction Type	Status
8000007266	CDN Work-Up, REG	In Process

- 3) Open the work-up activation from the ‘Related Transactions’ tab.
- 4) Click on ‘Forms’ and select ‘Work-up Schedule’ to produce the work-up collection schedule form.

**Note: Printing work-up schedules from the Forms button is only for Canadian registrant work-ups; for International registrant work-ups, obtain work-up schedule from the work-up Attachments.**

To confirm the schedule is acceptable:

- 1) Click “Edit” in the ‘Details’ tab.
- 2) Enter ‘Patient Prep On:’ date.
- 3) Enter the ‘Planned Infusion On:’ date.

**CTC Dates**

Patient Prep On: 2014/03/11

Planned Infusion On: 2014/02/20

Px Verific. Provided On:

- 4) Click “Save”.
- 5) Click the “Back” button to return to the task.
- 6) Click “Set to Complete”.

Set to Completed

### 12.8 Work-up courier instructions

- 1) Receive task “Work-Up – Courier Instructions Available”.

Work-Up – Courier Instructions Available

- 2) Assign and open task.
- 3) From the ‘Related Transactions’ tab, open the work-up activation.

Related Transactions		
Transaction ID	Transaction Type	Description
800007883	CDN Work-Up, REG	CDN Work-Up, REG

- 4) Obtain the courier instructions in the ‘Attachments’ tab.

Partners				
Attachments				
Acti...	File Name	Folder	Created By	Created On
	Courier instructions.pdf		TSTCBUCM	2019/07/11 1...

- 5) Set task to completed.

### 12.9 Enter registrant Verification Typing (VT) results (for simultaneous Verification Typing (VT))

- 1) Open the work-up activation.
- 2) Click on the ‘HLA Typing’ tab.
- 3) Click “Edit”.
- 4) Enter the typing results.

Reg VT Results	IDMs	Post-Collection	Requested Services	Related Transactions	Notes
A*: 01:01		02:06			DQA1*: <input type="text"/>
B*: 35:03		51:01			DGB1*: <input type="text"/>
C*: <input type="text"/>					DPA1*: <input type="text"/>
DRB1*: 01:01		14:04			DPB1*: <input type="text"/>
DRB3*: <input type="text"/>					
DRB4*: <input type="text"/>					HLA Test Date: 2014/03/29 <input type="text"/>
DRB5*: <input type="text"/>					HLA Lab: ABC LAB <input type="text"/>

- 5) Enter the 'HLA Test Date' and 'HLA Lab'.

HLA Test Date:  

HLA Lab:

- 6) Click "Save".
- 7) A confirmation window will appear for the user to verify the entries. Any discrepancies between the values entered and the current donor/CBU HLA will be highlighted, for example:

Discrepancy(ies) identified. Please review the highlighted record(s) for accuracy.

Item	Original	New
DNA-A, 1st allele	02:01	01:02
DNA-A, 2nd allele	11:01	11:01
DNA-B, 1st allele	15:01	02:03
DNA-B, 2nd allele	51:01	
DNA-C, 1st allele	03:04	03:04
DNA-C, 2nd allele	04:01:01G	04:01:01G
DNA-DRB11, 1st allele	04:01	03:BCAD
DNA-DRB12, 2nd allele	14:BCAD	14:01:01
DNA-DRB31, 1st allele		
DNA-DRB32, 2nd allele		
DNA-DRB41, 1st allele		
DNA-DRB42, 2nd allele		
DNA-DRB51, 1st allele		
DNA-DRB52, 2nd allele		
DNA-DPA11, 1st allele		
DNA-DPA12, 2nd allele		
DNA-DPB11, 1st allele	04:01	04:02
DNA-DPB12, 2nd allele		
DNA-DQA11, 1st allele	01:01	
DNA-DQA12, 2nd allele		
DNA-DQB11, 1st allele	03:02	03:01
DNA-DQB12, 2nd allele		

OK Cancel

- 8) Click "OK" if the information is correct or "Cancel" if changes need to be made.

### 12.10 Clearance

- 1) Receive task” Work-Up - Clearance Available”.

Work-Up – Clearance Available

- 2) Assign and open task.
- 3) From the ‘Related Transactions’ tab, open the work-up activation.

Related Transactions		
Transaction ID	Transaction Type	Description
800007883	CDN Work-Up, REG	CDN Work-Up, REG

- 4) Click on the ‘Attachments’ tab to view the attached documents.
- 5) When the Physician has signed the prescription verification form, attach it to the work-up attachments tab.
- 6) Click “Edit” in the ‘Details’ tab.
- 7) Enter the ‘Px. Verific. Provided On’ date.

#### CTC Dates

Patient Prep On: 2014/05/20 

Planned Infusion On: 2014/05/29 

Px Verific. Provided On: 2014/04/30 

Courier Det. Provided On:  





- 8) Click “Save”.
- 9) Set task to completed.



### 12.11 Send courier details

- 1) Generate the 'Pre-Transplant Work-Up Courier Details' form from the Work-Up by clicking "Forms" and selecting 'Work-Up Courier Details'.
- 2) Attach the completed courier details to the work-up 'Attachments' tab.
- 3) Click "Edit" in the Details tab.
- 4) Enter the 'Courier Det. Provided On' date.

**CTC Dates**

Patient Prep On:	2014/05/20	
Planned Infusion On:	2014/05/29	
Px Verific. Provided On:	2014/04/30	
Courier Det. Provided On:	2014/05/01	

- 5) Click "Save".

### 12.12 Courier letter

- 1) Receive task "Work-Up – Courier Letter Available".

Work-Up – Courier Letter Available

- 2) Assign and open task.
- 3) From the 'Related Transactions' tab, open the work-up activation.

Related Transactions		
Transaction ID	Transaction Type	Description
8000007883	CDN Work-Up, REG	CDN Work-Up, REG

- 4) Click on the 'Attachments' tab to view the courier letter.
- 5) Set task to completed.

## 12.13 Postponing a work-up

### 12.13.1 Requesting a postponement of a work-up

- 1) Open the work-up.
- 2) Click the “Postpone” button.



- 3) Select the ‘Reason’.
- 4) Enter the ‘Plan Resume Date’.

A screenshot of a web application interface. At the top, there is a blue header bar with the text "Task Details" and a yellow "Edit" button. Below this is a section titled "General Data" with several input fields: "Task ID:" (empty), "Reason:" (dropdown menu with "Work-Up – Request to Postpone" selected), "Created On:" (text box with "2014/04/30"), "Due Date:" (text box with "2014/05/05"), and "Status:" (dropdown menu with "New" selected). Below this is a section titled "Request to Postpone Details" with two fields: "Reason:\*" (dropdown menu with "Patient Condition Deteriorated" selected) and "Plan Resume Date:\*" (text box with "2014/06/06" and a calendar icon). At the bottom is a section titled "Description" with a large empty text area.

- 5) Enter any other details in the description area.
- 6) Click “Save”.
- 7) The task “Work-Up – Postponement Confirmed” will be received once the request to postpone has been confirmed by the registry.

### 12.13.2 Resuming a work-up

To resume a work-up that has been postponed, a follow-up task needs to be sent from the work-up to the Case Manager with information such as:

- New requested collection date(s)
- Whether new pre-collect samples are required.

### ***12.14 Product report available***

- 1) Receive “Work-Up – Product Report Available” or a follow-up task for Canadian registrant.

Work-Up – Product Report Available

- 2) Assign task and open the work-up.
- 3) The product report will be available in attachments.
- 4) Set task to completed.

### ***12.15 Confirm receipt of the product & infusion***

- 1) Complete applicable forms to confirm receipt of the product. To generate the ‘Transplant Centre Product Infusion Report’ from the Work-Up, click the “Forms” button and select ‘TC Product Infusion Record’.
- 2) Click on ‘Attachment’ tab and attach the completed document(s).
- 3) Send a follow-up task to Case Manager to let them know the completed forms are available.

### ***12.16 Sending thawing and infusion report for Cord Blood Unit (CBU)***

- 1) Complete thawing and infusion report.
- 2) Open work-up.
- 3) Click on ‘Attachment’ tab and attach the documents.
- 4) Send a follow-up task to Case Manager to let them know the completed forms are available.

**Note: When the product has been infused, update the patient profile to the appropriate status as per Instruction 2.3.**

## 13 Cancelling an activation/ work-up

A request needs to be put in to cancel any activation/work-up that is in process. The cancellation requests for activations not requiring assessment will automatically be completed. All other activation cancellations requests will be investigated by the registry who will either Confirm or Deny the request.

### 13.1 Request a cancellation

- 1) Open activation.
- 2) Click “Edit” on the ‘Activation Details’ tab.
- 3) In the ‘Request to Cancel’ section:
  - a. Select the status as “Requested”
  - b. Select ‘Reason’.



The screenshot shows a form titled "Request to Cancel". It contains three fields: "Status" with a dropdown menu set to "Requested", "Reason" with a dropdown menu set to "Patient Died", and "Requested On" with a text box containing "2013/12/11".

- 4) Click “Save”.

### 13.2 Receiving cancellation notification

A task will be sent to notify you if the activation/ work-up was able to be cancelled or not.

“Activation – Cancelled”	Activation was successfully cancelled
“Work-Up – Cancelled”	Work-Up was successfully cancelled
“Activation – Unable to Cancel”	Activation was not able to be cancelled and will proceed.

**Note: If a work-up is not able to be cancelled, a follow-up task will be sent by the Case Manager.**

- 1) Assign and open task.
- 2) After reviewing, set task to completed.

# SUMMARY PAGE



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Patrick Eves;Final QA	Signature;2024-07-25	10:49:01	AM	EDT

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