TBC User Guidelines

Document Overview

This document is intended to provide guidelines for all users to create an account, add funds, and place an order on the Partners Core Management system and submit samples to CAMD TBC.

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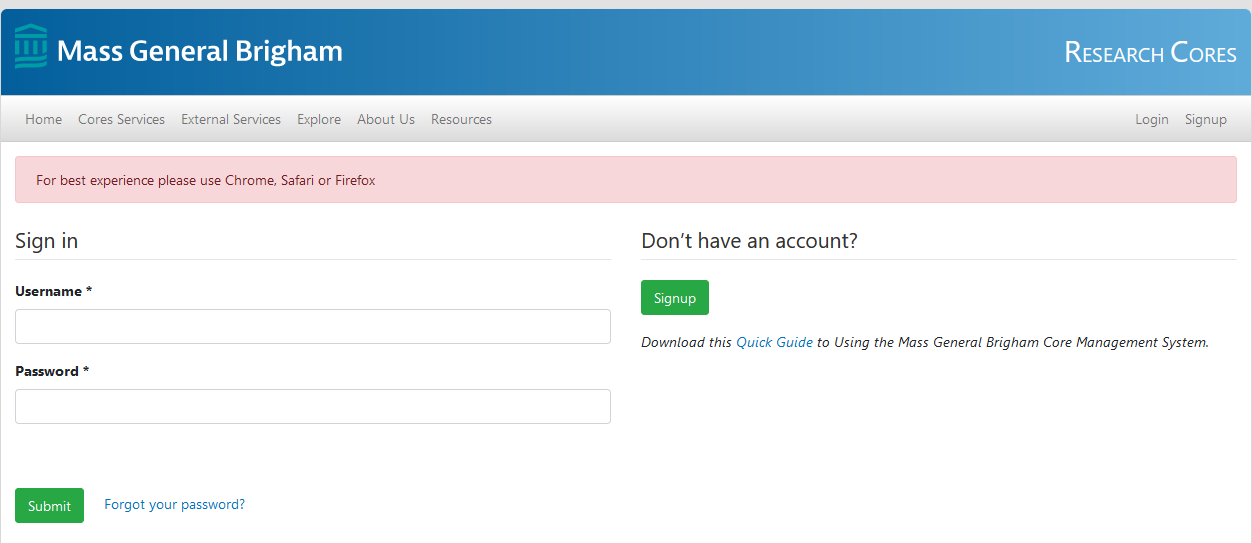
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# **Step 1** | Creating and Logging into an Account

1. Visit <https://researchcores.partners.org/camd/about>
   1. For **New Users**, createan account by choosing ***Signup*** in the upper right corner; once the account is established, follow the *Login* instructions.
   2. For **Current Users**, login to your account by choosing ***Login***to either place a new order or update an existing service request.



# **Step 2** | Adding Fund(s) Information

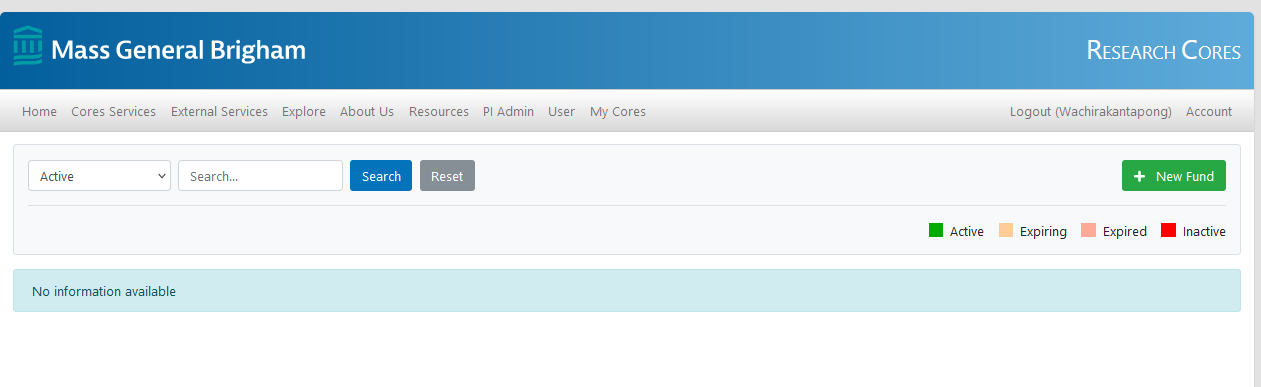
## Adding a New Fund

1. Click ***Funds*** under ***User****.* If you are unable to view the page below, please use this link:<https://researchcores.partners.org/my/funds>

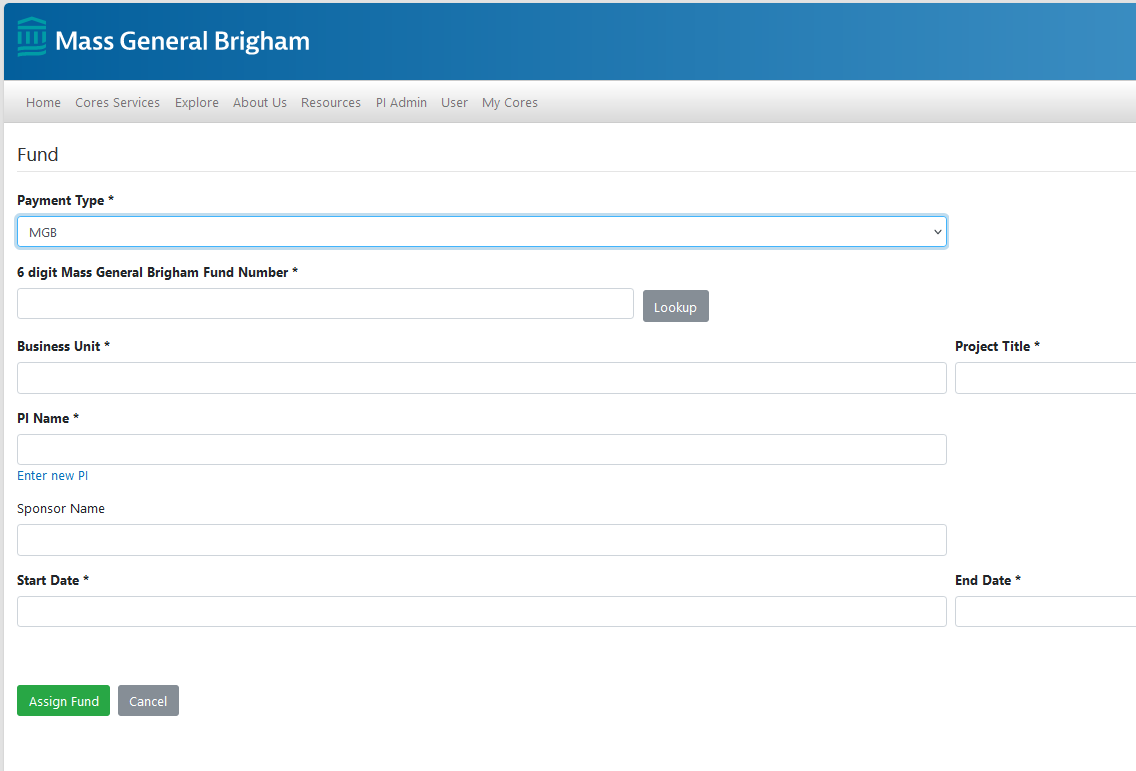
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1. Click the green ***New Fund*** button in the upper right.

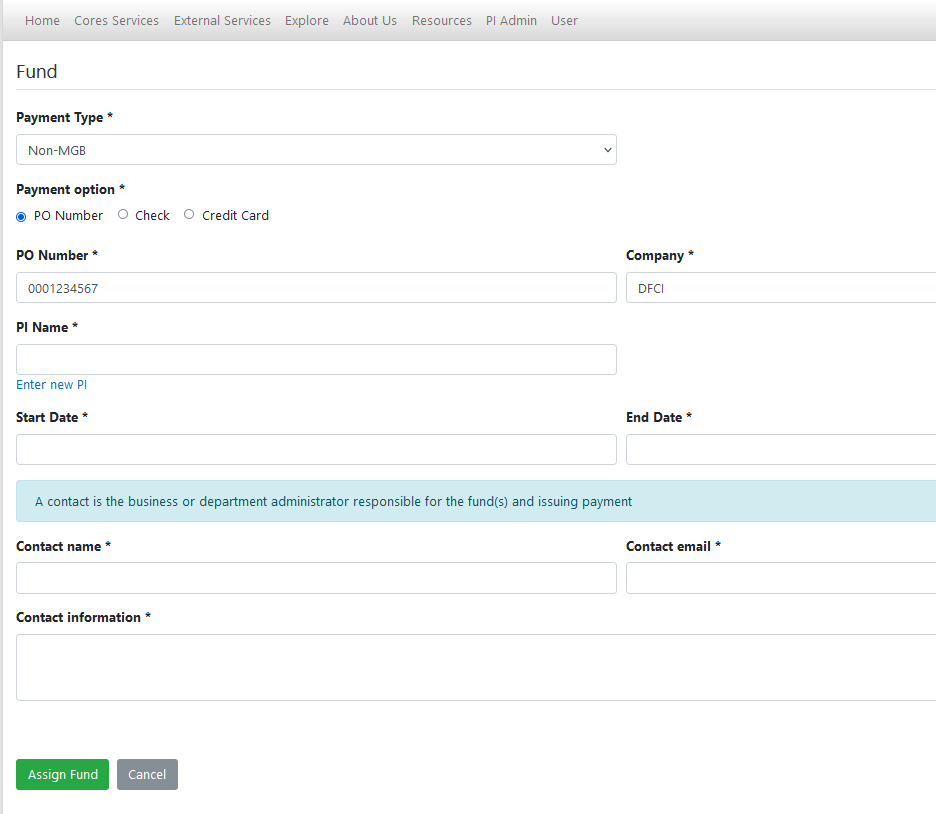


1. Fill in the Funding information.
   1. **MGB** users, under ***Payment Type*** please select ***MGB*** and provide a 6-digit Partners Fund Number, Business Unit, Project Title, PI Name, Start Date, and End Date(**please select a date in the future that exceeds the length of the study by at least 3 months)**.Click ***Assign Fund****.*



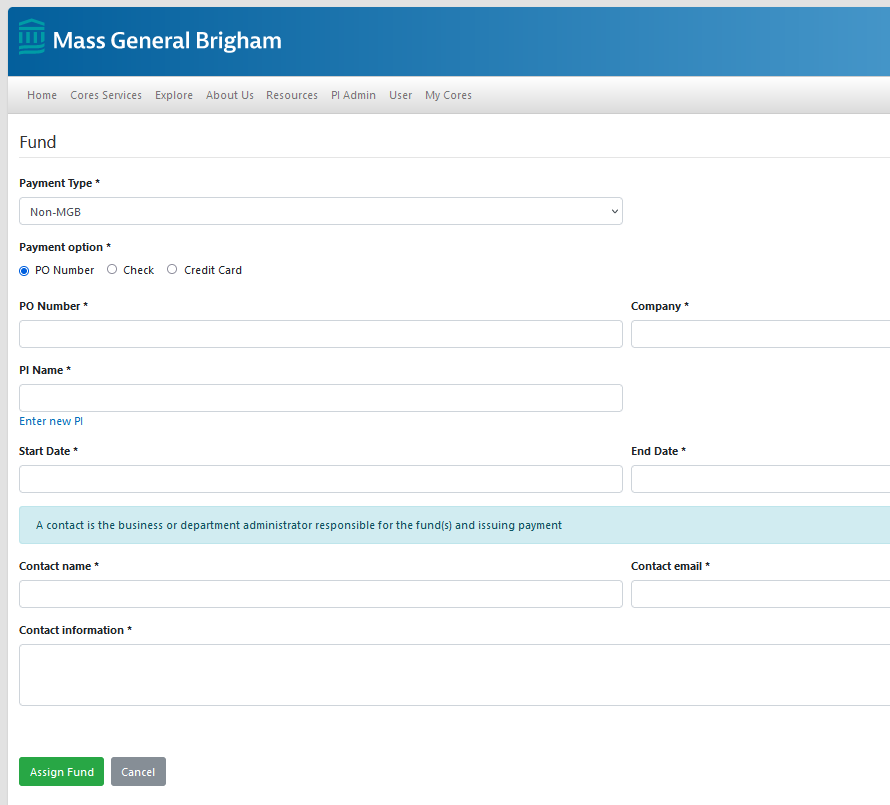
* 1. **DFCI** users, please note that **we** **are unable to accept DFCI Internal Cost Center numbers** since we cannot direct charge for services. The preferred payment method is a **Purchase Order (PO),** which must be requested from your grant or financial administrator; if you need a quote in order to request the PO, please contact us at [BWHCAMDResearchCore@bwh.harvard.edu](mailto:BWHCAMDResearchCore@bwh.harvard.edu). We accept the following four payment options:
     + 1. For **Purchase Order (PO)**, under ***Payment Type*** please select ***Non-MGB****,* check***PO Number*** and fill in the information. The PO# **must start with three zeros** (000#######) or the payment will not be drawn properly.
       2. For **Check**, under *Payment Type* please select *Non-MGB,* Check and [click here for instructions under Next Steps, 4b](#CreditCard) regarding how to remit payment.
       3. For **Credit card**, under *Payment Type* please select *Non-MGB,* check *Credit Card* and [click here for instructions under Next Steps, 4b](#CreditCard) regarding how to remit payment.
       4. If you are a DFCI user **affiliated with an MGB funding source**, under ***Payment Type*** please select ***MGB*** and provide a 6-digit Partners Fund Number and Business Unit. [Click here for instructions.](#MGBInternalFunding)

Once the funding information is completed, enter the Project Title, PI Name, Start Date, and End Date**(please select a date in the future that exceeds the length of the study by at least 3 months)**.Click ***Assign Fund.***



* 1. **External Non-MGB** users, the preferred payment method is a **Purchase Order (PO)**; please contact us at [BWHCAMDResearchCore@bwh.harvard.edu](mailto:BWHCAMDResearchCore@bwh.harvard.edu) if you need a quote in order to request the PO. We accept the following three payment options:
     + 1. For **Purchase Order (PO)**, under ***Payment Type****,* please select ***Non-MGB****,* select***PO Number****,* and fill in the information.
       2. For **Check**, under ***Payment Type*** please select ***Non-MGB****,* ***Check*** and [click here for instructions under Next Steps, 4b](#CreditCard) regarding how to remit payment.
       3. For **Credit card**, under ***Payment Type*** please select ***Non-MGB****,* check***Credit Card*** and [click here for instructions under Next Steps, 4b](#CreditCard) regarding how to remit payment.

Once the funding information is completed, enter the Project Title, PI Name, Start Date, and End Date**(please select a date in the future that exceeds the length of the study by at least 3 months)**.Click ***Assign Fund.***

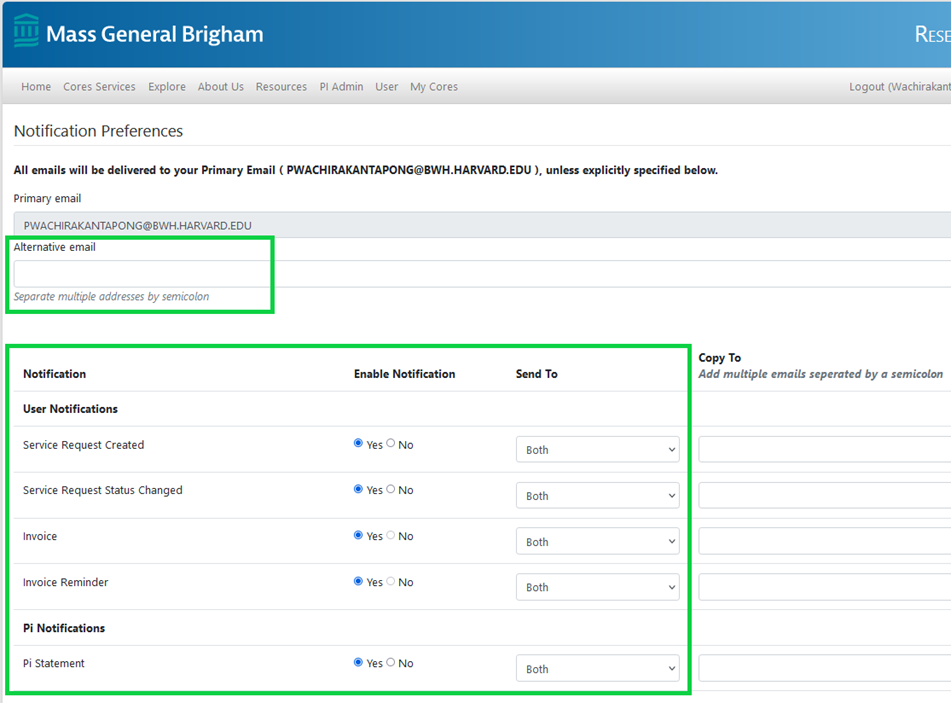


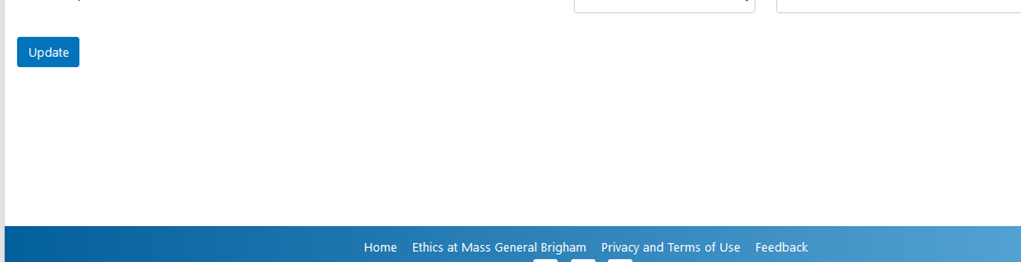
For more information about funding guidelines, please visit <https://researchcores.partners.org/forms_resources>.

# **Step 3** | Notification Preferences

## Adding additional email recipients to your user account.

1. Visit <https://researchcores.partners.org/my/notification_preference>
2. Provide an alternative email if you have more than one account or have colleagues that must receive notifications regarding service requests (separate multiple addresses by semicolon).
3. Provide either a Finance or Grant Administrator email address to facilitate payment of invoices.
   * For **DFCI users paying with a PO**, please include the email address **GHXODAP.DFCI@na.firstsource.com** under ***Invoice*** *and* ***Invoice Reminder.***
4. Ensure to select ***Both*** under ***Send To.***
5. Click ***Update.***





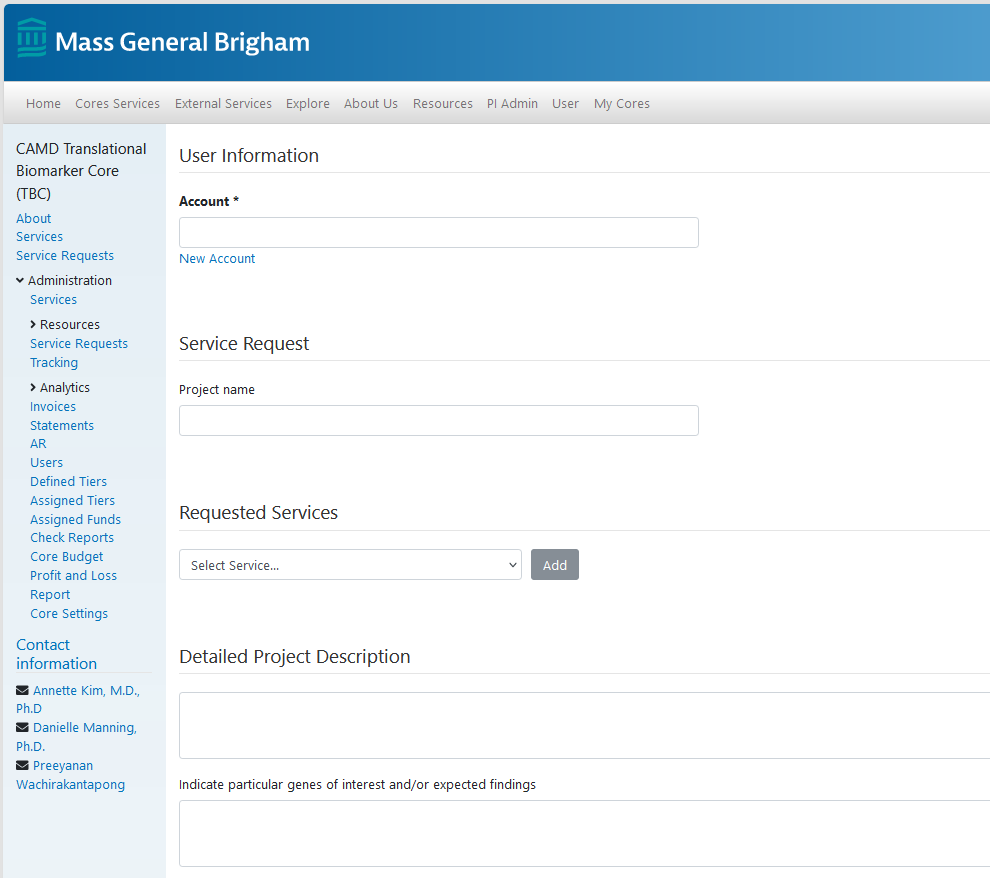
# **Step 4** | Creating a Service Request

1. Click ***Services***in the upper left *or* visit <https://researchcores.partners.org/camd/services>
2. Check any services you would like to place an order and click the blue button in the upper left, ***Order Services***.

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1. Provide the **Project name** under **Service Request**.



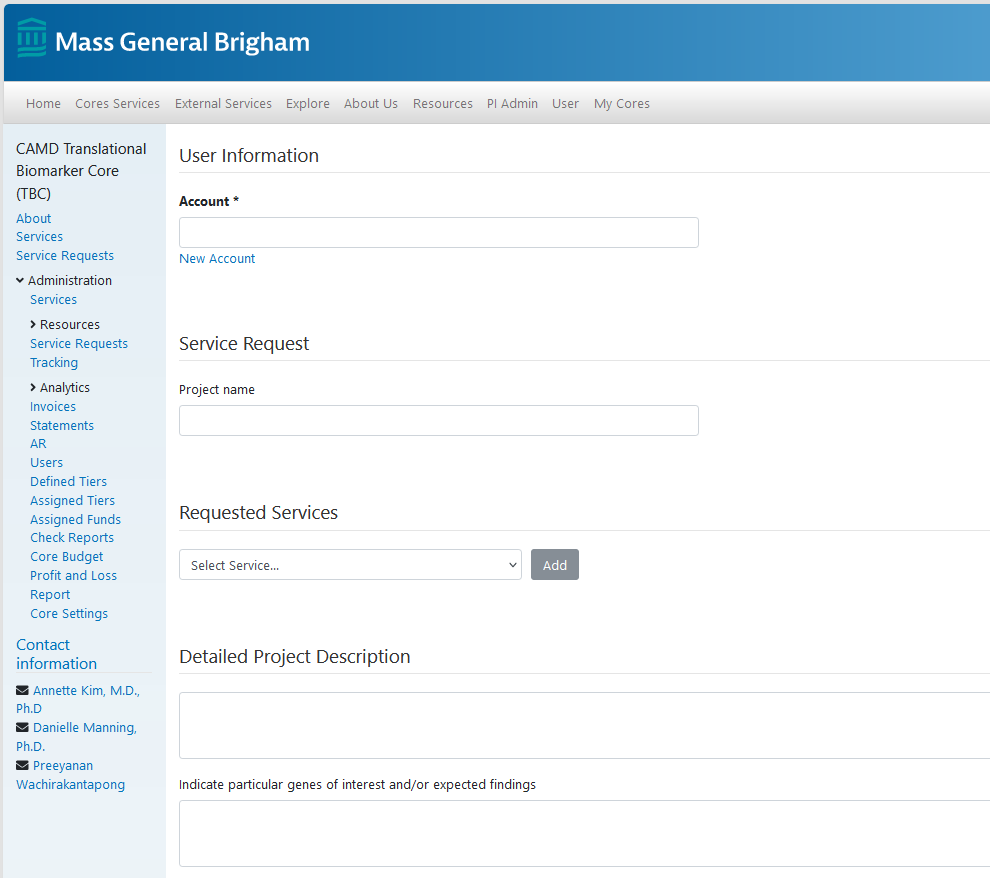
1. Enter the total number of units for the project. If the total number of units is not finalized when the requisition is opened, please add an estimated unit for each service you selected.
   1. For **Single Projects/Studies**, add the number of units/samples for each service.
   2. For **Longitudinal Studies**, please provide the number of expected units for each service.

**PLEASE NOTE**: **OncoPanel-without Pathology sign-out** is only permitted if a BWH Pathology faculty member will sign out the cases; if selected, please **provide your** **Collaborating Pathologist’s Name**in the **Detailed Project Description**below.

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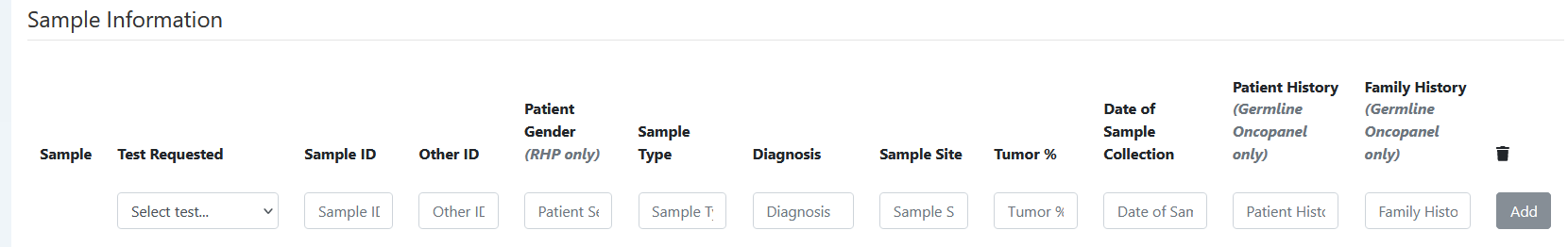
1. Fill in the **Detailed Project Description**and **Expected Findings**.
   1. **Detailed Project Information** must include:
      1. The **study PI** information (Name, Last Name) or the **study ID.**
      2. A brief description of the project, including project rationale and goals.
      3. If the sample type is Formalin-Fixed Paraffin-Embedded (FFPE) and **an H&E will not be submitted** with the slides, please note that we should **scrape all tissue.**
   2. **Expected findings** may be indicated for diagnostic testing, if applicable (i.e., genes of interest for OncoPanel or RHP).



1. Select **Yes**if the project is ongoing/longitudinal. Select **No** for a single project.



1. Provide the specimen information. **PLEASE NOTE:** We require **2 matching identifiers** on the physical sample(s) and the submission form.
   1. Physical Sample Requirements:
      1. The provided **Sample ID** **must match one ID** on the material submitted and the **other ID must** **match an additional identifier**. For FFPE samples, **both IDs on H&E and USS must match**.
      2. Acceptable **sample identifiers** include subject number, block number (FFPE), surgical case number, SHL accession, DOB or YOB, and initials.
   2. Submission Form Requirements:
      1. Acceptable **sample information** documentation:
         1. *CAMD TBC Service Request* – complete the Sample Information section on the TBC website.

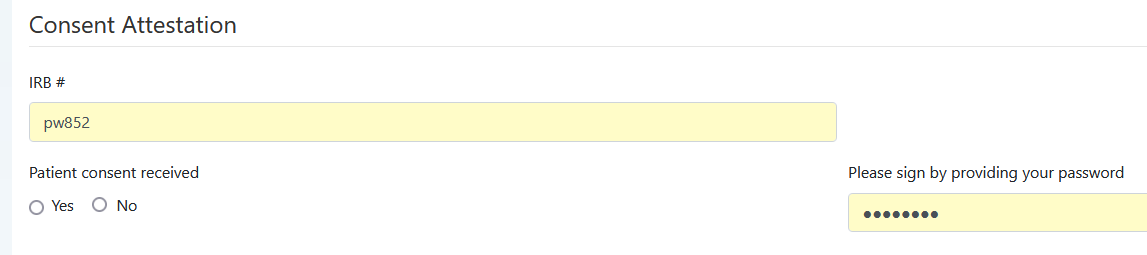


* + - 1. *Sample Manifest Excel File* – in lieu of typing into the website, complete a sample manifest and upload it to the Service Request in the Documents section.

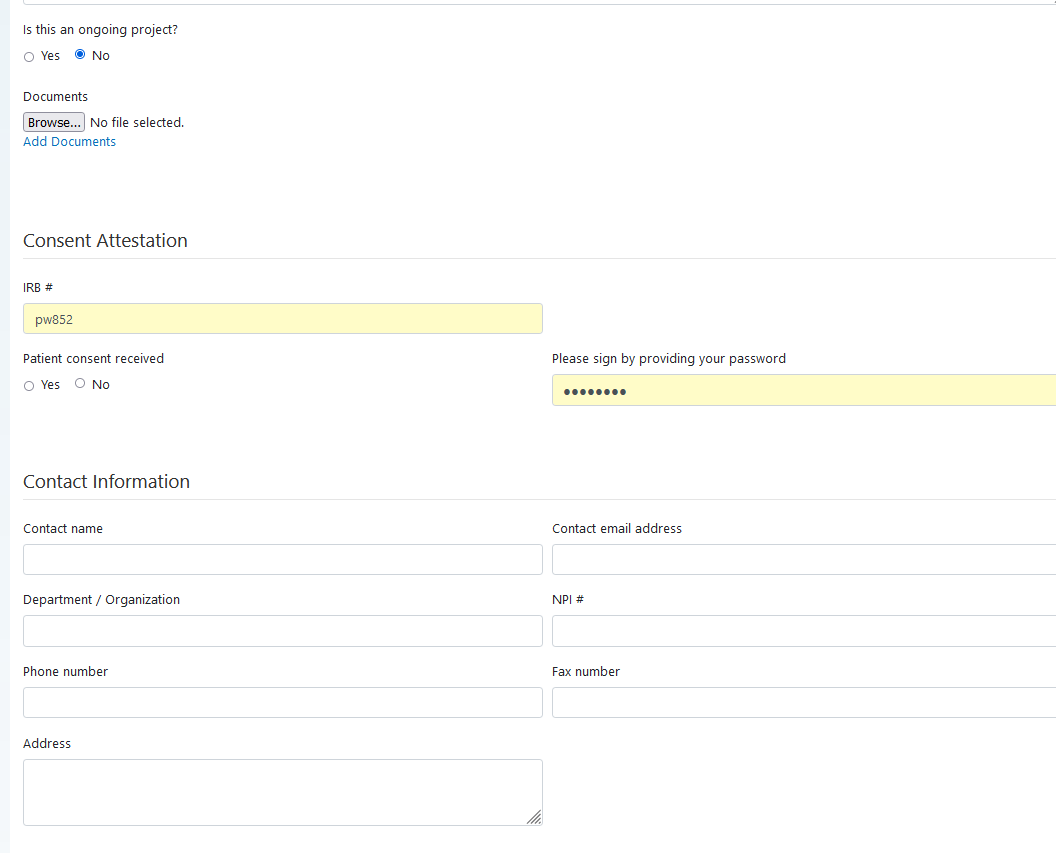


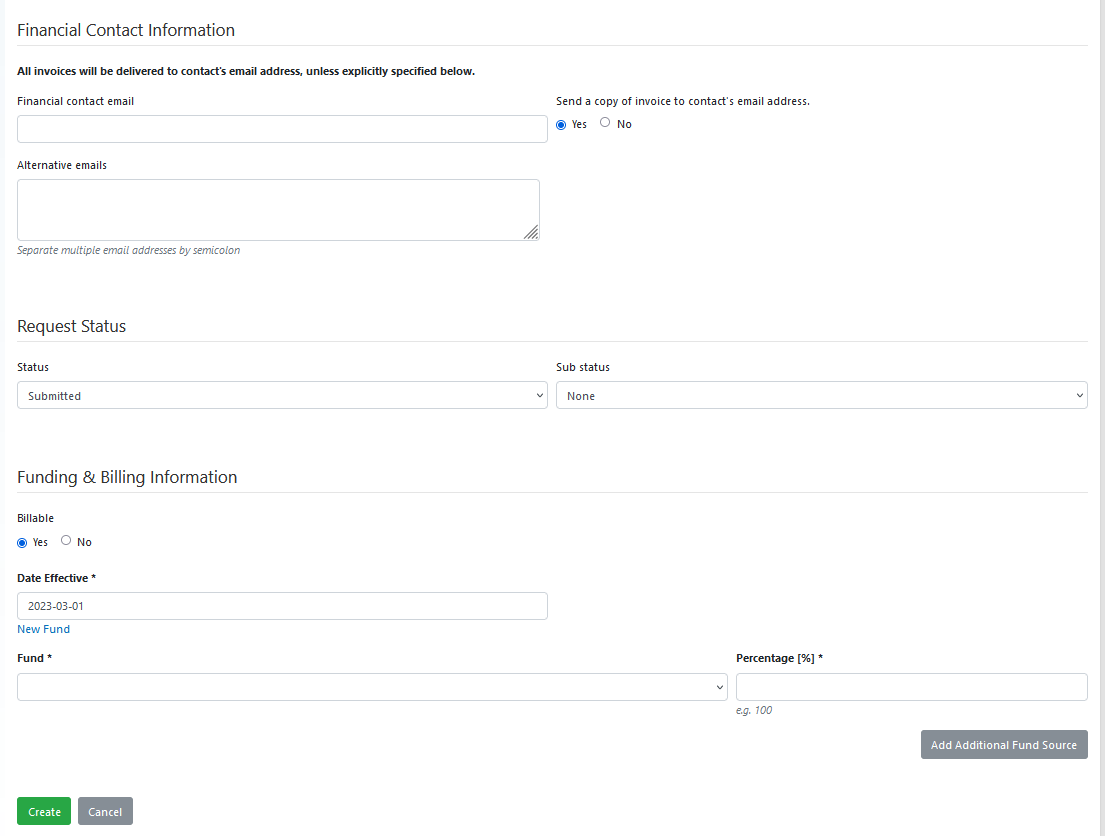
* + - 1. *Custom Submission Form* – for ongoing/longitudinal studies, TBC can assist in creating a custom requisition per project. Contact [BWHCAMDResearchCore@bwh.harvard.edu](mailto:BWHCAMDResearchCore@bwh.harvard.edu) for details.
    1. The **identifier information must be identical between the form and samples**; receipt of mismatched and/or incomplete sample information will delay processing.

1. Provide IRB# if required. If unknown or not required, fill in N/A under Content Attestation. Select **Yes or No** under Patient consent received. Provide your password.



1. Provide Contact name and Contact email address under **Contact Information** and Click ***Create****.*





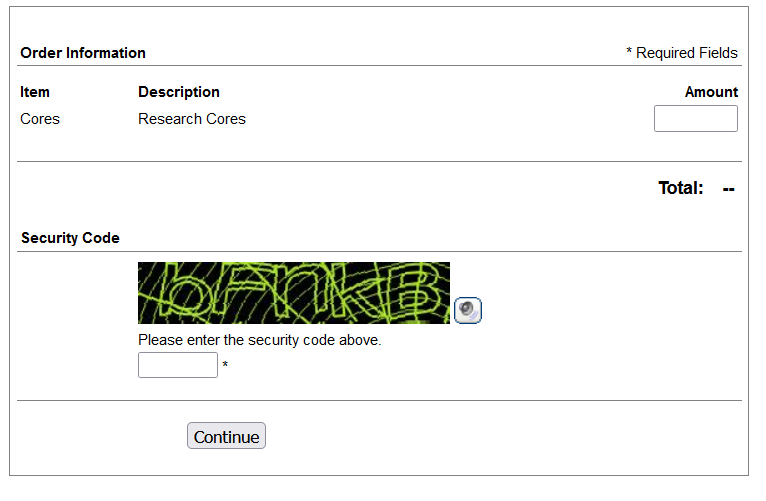
# Next Steps

1. Once you click ***Create****,* the unique identification number (CAMD-#####) will be assigned to your project.
2. Please **email us at** [BWHCAMDResearchCore@bwh.harvard.edu](mailto:BWHCAMDResearchCore@bwh.harvard.edu); include the **date and time** you would like to stop by if you are a walk-in user or send a **shipping notification** with tracking number for all sample shipments.
   1. Be sure to include the **PI name** or**Study ID** and the **CAMD-ID number (CAMD-#####)** in the subject line of the email for all correspondence.
   2. Include a **printed copy** of the completed Service Request, Sample Manifest, or Custom Sample Submission Form (for ongoing/longitudinal studies) with each drop-off or shipment to the appropriate address below.
      1. ***Walk-in Address*** | Monday - Friday 9:30am-4:00pm  
         ATTN: CAMD TBC Research Core (CAMD-#####)  
         70 Francis Street  
         BWH Shapiro building  
         CAMD Specimen Receiving Window, 5th floor, N Elevator (follow the arrow signs as you exit the elevator)
      2. ***Shipping Address*** | Monday - Friday 9:30am-4:00pm   
         ATTN: CAMD TBC Research Core (CAMD-#####)  
         Brigham and Women's Hospital  
         Center for Advanced Molecular Diagnostics, SH-5032  
         75 Francis Street, Boston, MA 02115

**PLEASE NOTE: We are unable to accept weekend deliveries, including holidays. Please only ship/drop off the materials with guaranteed delivery of Monday-Friday before 4:00pm. For MGB holidays, please** [click here](https://researchcores.partners.org/data/wiki_pages/97/MGB_Holiday_Calendar_2024.pdf)**.**

1. Reports
   1. For **OncoPanel**, reports will be delivered via OneDrive (approximately 4-8 weeks from the time we receive the sample). One of our TBC colleagues will reach out to you with a link to your project folder.
   2. For **all other assays**, reports will be delivered to the email address(es) provided via PowerPath.
2. Billing
   1. Once the project is completed, the invoice will be auto generated and sent from our system on the 7th of the following month to the email addresses provided.
   2. To pay by credit card, visit <https://researchcores.partners.org/forms_resources> and click ***Pay with Credit Card***then complete the information.





# References

