Specimen Chain of Custody and Traceability Workshop

Workshop IndexDuration: 4 DAYS

Use the index to navigate the workshop sections and open quick reference modals for scope, audience, outcomes, delivery, policies, and FAQs.

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Quick Summary

Traceability SystemsWorkflow TrainingCompliance Ready

Strengthening Chain of Custody Controls Across Specimen Handling and Transfer

Understand the principles of chain of custody and why traceability is critical for specimen integrity, accountability, and defensible laboratory workflows.

TraceabilityIntegrity

Review documentation checkpoints from collection through transport, receipt, storage, testing, and archival or disposal actions.

DocumentationLifecycle Control

Learn how labeling, handoff records, timestamps, and authorized access support continuous specimen traceability.

LabelingAuthorized Access

Identify common gaps such as incomplete logs, broken seals, unclear custody transfer, and mismatched identifiers.

Custody TransferIdentifier Control

Connect custody protocols with quality assurance, audit readiness, incident investigation, and reporting reliability.

Audit ReadinessQuality Assurance

Build practical awareness for applying custody controls in routine specimen management environments.

Routine PracticeSpecimen Management

Overview

Custody ControlProcess BasedOperational Quality

Overview and Outcomes for Reliable Specimen Custody Documentation and Handoffs

Examine the full specimen custody pathway from collection point to final disposition with emphasis on uninterrupted traceability.

End To EndContinuous Traceability

Understand who should attend, including sample reception teams, laboratory staff, supervisors, and quality personnel.

Lab StaffQuality Personnel

Recognize the role of seals, signatures, identifiers, timestamps, and custody logs in maintaining defensible records.

Custody LogsDefensible Records

Clarify how transfer accountability supports root-cause review, discrepancy resolution, and incident documentation.

Transfer AccountabilityIncident Review

Develop outcome-oriented thinking for preventing traceability failures before they affect testing or reporting.

Failure PreventionReporting Protection

Strengthen awareness of compliant workflow behaviors that support secure specimen movement and controlled access.

Controlled AccessWorkflow Discipline

Agenda

Scenario BasedHands On ReviewTraceability Focused

Agenda and Hands-on Review of Custody Logs, Transfers, Seals, and Exception Handling

Cover agenda topics on specimen receipt, accessioning, transfer recording, storage assignment, and release authorization.

AccessioningRelease Authorization

Review chain of custody forms, seal checks, handoff validation, and error points during inter-person and inter-location transfers.

Seal ChecksHandoff Validation

Use case scenarios to examine missing records, damaged packaging, time gaps, and conflicting identifiers.

Gap AnalysisConflict Review

Practice documenting custody deviations, escalation steps, and corrective actions for traceability incidents.

Deviation RecordsCorrective Actions

Explore hands-on review of specimen labeling alignment, record matching, and accountability checkpoints.

Record MatchingAccountability

Reinforce workflows that preserve sample traceability even during high-volume processing or multi-step transfers.

High Volume Multi Step Transfers

Deliverables

Reference Material Documentation Guidance Process Output

Deliverables, Documentation Guidance, and FAQs for Specimen Traceability Programs

Receive practical guidance on custody forms, transfer records, specimen identification controls, and exception documentation.

Transfer Records Exception Logs

Gain reference points for secure handoffs, audit preparation, and traceability-focused quality reviews.

Secure Handoffs Audit Support

FAQ topics address broken custody chains, incomplete logs, responsibility assignment, and documentation corrections.

Broken Chains Corrections

Participants can adapt outcomes to improve traceability performance and reduce sample handling ambiguity.

Performance Improvement Ambiguity Reduction

Delivery recommendations support quality meetings, accessioning reviews, custody audits, and staff calibration.

Custody Audits Staff Calibration

Policies emphasize careful handling, accurate logging, restricted access, and transparent documentation discipline.

Accurate Logging Restricted Access

Quick View Who Should Attend Outcomes Delivery Policies FAQs