Void/Delete Samples

Background:

At least once a year, review and address Sample Records without a contract. Some samples can be removed from the system, while others need to be voided. Typically you will address samples without contracts but you can follow the below procedure for samples that were created incorrectly as well.

Roles:

CM Admin

Navigation:

Materials > Sample Records >

1. From the Sample Record Overview page, toggle the **Advanced Filter** to **Samples No Contract**
   Note: this filter should filter Sample Records that do not have a Contract Associate that are not in the status Void.
2. Click on the **Sample ID** for the sample to be removed.
3. In the **General** tab review the **Authorized By** field, if it is empty move to Step 6.
4. If it is populated open the **Component Actions Menu** and click **Unauthorize.**
5. To void or delete a sample, all **Tests** in the Sample Record need to be removed. In the **Tests** tab click the **Row Actions Menu** of the Test that you need to remove and click **Delete**

6. Click **Save**
7. To void or delete a sample, all **Associations** in the sample record need to be removed. In the **Associations** tab click the **Row Actions Menu** of the Association that you need to remove and click **Delete**
8. Click **Save**

Voiding a Sample:

Materials > Sample Records >

1. On the Sample Record Overview page, toggle the **Advanced Filter** to **Samples No Contract**
2. Click on the **Sample ID** for the sample
3. Open the **Component Actions Menu** and click **Void**

Deleting a Sample:

Materials > Sample Records >

1. From the Sample Record Overview page, toggle the **Advanced Filter** to **Sample No Contract**
2. In the **Row Actions Menu** for the Sample Record select **Delete**
3. Click **Save**