

Managing Your Master CDOS File as a Team

Document control tips for labs where more than one person edits the compendium

WHY THIS MATTERS - The CDOS loader replaces your entire compendium with whatever file is submitted. If two people edit separate copies at the same time, whichever one is submitted last will silently overwrite the other person's changes. A few simple habits prevent that.

Recommended approaches

Pick one or combine a few — these are ordered roughly from simplest to set up to most robust for larger teams.

1. Assign one owner per submission cycle

Designate a single person who does the actual file prep and submits the ticket. Others can request changes to that person directly, but only one person touches the live Master CDOS file and clicks submit. This avoids two people editing separate copies and one submission silently wiping out the other's work.

Best for: Small teams; the simplest fix and often all that's needed.

2. Treat the last submitted file as the only source of truth

Because the loader overwrites everything, the file that was last submitted — not whatever is sitting on someone's desktop — is the real master. Before starting new edits, pull the file from the most recently submitted ticket rather than a local copy that may be out of date.

Best for: Any team; a good habit regardless of what else is in place.

3. Use a staging file name while work is in progress

The loader only cares about the file name at the moment it's submitted (root name unchanged, date updated). Teams editing collaboratively can work in a clearly-marked staging copy — for example XYZ_STAGING_WIP — and only rename it to the required submission format right before sending. This keeps in-progress edits from accidentally being attached to a ticket early.

Best for: Teams that edit over multiple days before submitting.

4. Add an internal change-log tab

The loader only reads your lab's specific tab and its required columns — it doesn't care about extra tabs. Add a simple, internal-only tab where anyone editing logs their initials, date, and what they changed. It's cheap insurance against “wait, who added this test?” confusion, and it travels with the file even if it's shared over email.

Best for: Teams of 3 or more, or infrequent submitters who need a paper trail.

5. Co-author in real time instead of emailing copies

If your team works in SharePoint, OneDrive, or Google Sheets, real-time co-authoring avoids the “three people, three versions” problem entirely — everyone edits the same live file. One caution: exporting from Google Sheets can sometimes drop formatting (for example, a leading “00” on LabCorp order codes). Double-check formatting after exporting and before submitting.

Best for: Teams already using shared drives; removes version conflicts almost entirely.

6. Set a short freeze window before submitting

A quick heads-up to the team — for example, “submitting the compendium at 3pm, no new edits after 2:45” — prevents a last-minute change from being missed because it wasn't in the copy that got attached.

Best for: Any team, especially right before a submission deadline.

QUICK RECAP - One clear owner, always start from the last submitted file, and a simple log or freeze window to catch last-minute changes. Any one of these on its own meaningfully reduces the risk of lost edits.

Questions about setting this up for your team? Contact your hc1 Client Success representative? or submit a request through the hc1 Support Portal.