



CU Boulder – Topaz Elements



PI & Associates Guide

Last Updated: 2018-10-24

Preface:

This guide provides an overview of how manage a research protocol.

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1. Lab/Classroom/Field Use Protocols

The following sections explain how to manage a research protocol in Topaz. The tutorials cover all of the submissions you will be required to submit throughout the lifetime of the study to include: an original protocol, interim review(s), amendment(s), and renewal(s).

- **New Protocol** – A **new protocol** is the first submission of your study. In an original protocol you are submitting new research for its first approval period. You will only have one original protocol throughout the lifetime of a study.

Submission Interval: Once – upon initial research proposal or upon the expiration of “Transition” protocol.

- **Interim Review** – An **interim review** protocol is used to provide an annual progress report when the study is not due for its three-year renewal. At interim review it is possible to submit any amending changes to the original protocol.

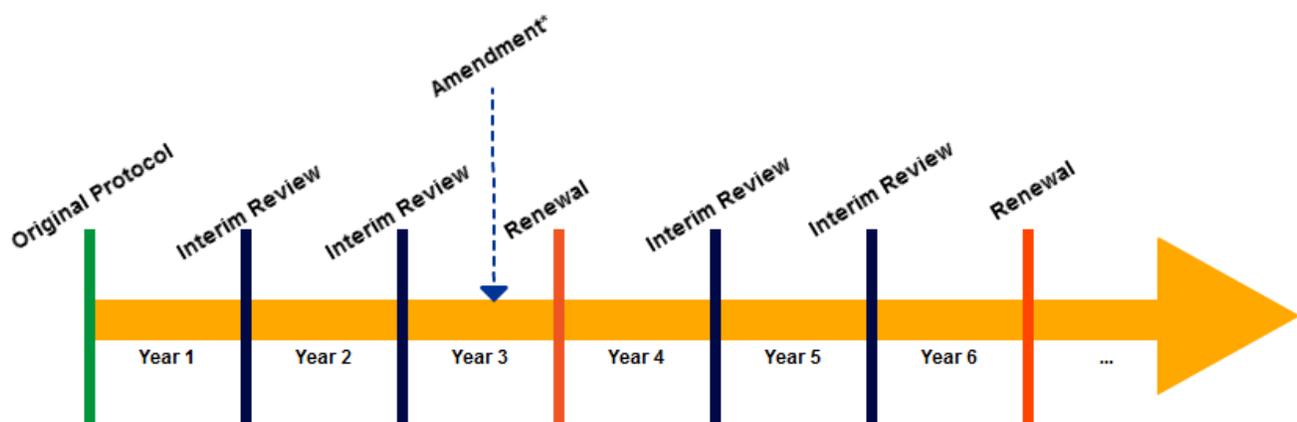
Submission Interval: Annually for the two years following initial approval or renewal.

- **Renewal** – A **renewal protocol** is submitted every three years following initial approval (i.e. year three of approval, year six of approval, year nine of approval, etc.). During renewal you can make amending changes to the original protocol, if desired.

Submission Interval: Every three years following initial approval.

- **Amendment** – An **amendment protocol** should be submitted if you need to make changes to an approved study. You can submit an amendment at any time during the lifetime of the study. If your study is nearing interim review, you can simultaneously submit any amending changes in that submission.

Submission Interval: No time constraints; submit as needed.



* An amendment can occur at any time during the lifetime of a study.

Original Protocol

A **new** protocol is the first submission for your study. In an original protocol you are submitting new research for its first approval period.

Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

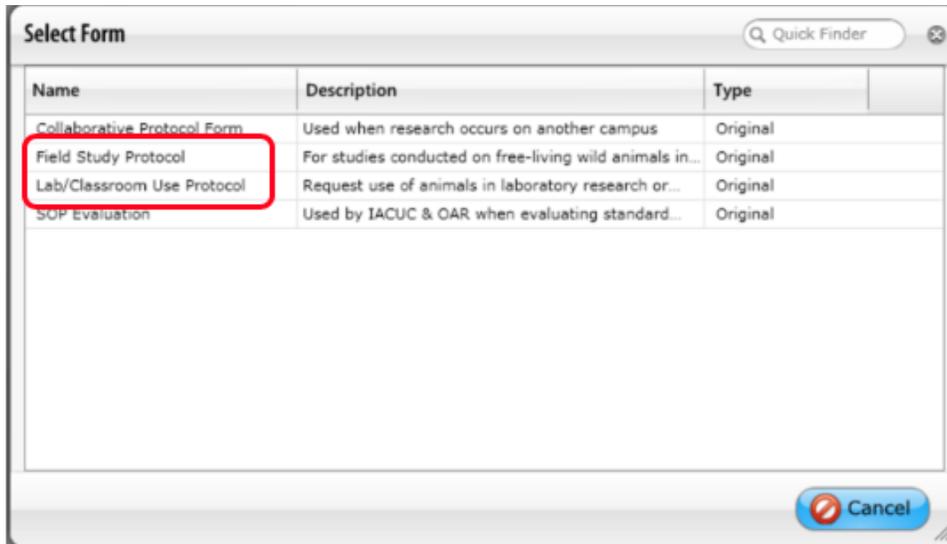
- **VPN:** To access Topaz from **off-campus**, you must **sign into the VPN** (i.e. [Cisco AnyConnect](#)).
- **PC Users:** On PCs, the browser still supporting the Silverlight plug-in necessary to run Topaz is **Internet Explorer**. – Also, do not confuse **Microsoft Edge** with **Internet Explorer**, see [Microsoft Edge is NOT Internet Explorer](#).
- **Mac OS users:** If you are a Mac user and require access to TOPAZ, you will need to use the [VMware Horizon Client](#).

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Original Protocol**.



Step 4: The screen will refresh. In the *Select Form* window, select **Field Study Protocol** or **Lab/Classroom Use Protocol**.



Name	Description	Type
Collaborative Protocol Form	Used when research occurs on another campus	Original
Field Study Protocol	For studies conducted on free-living wild animals in...	Original
Lab/Classroom Use Protocol	Request use of animals in laboratory research or...	Original
SOP Evaluation	Used by IACUC & OAR when evaluating standard...	Original

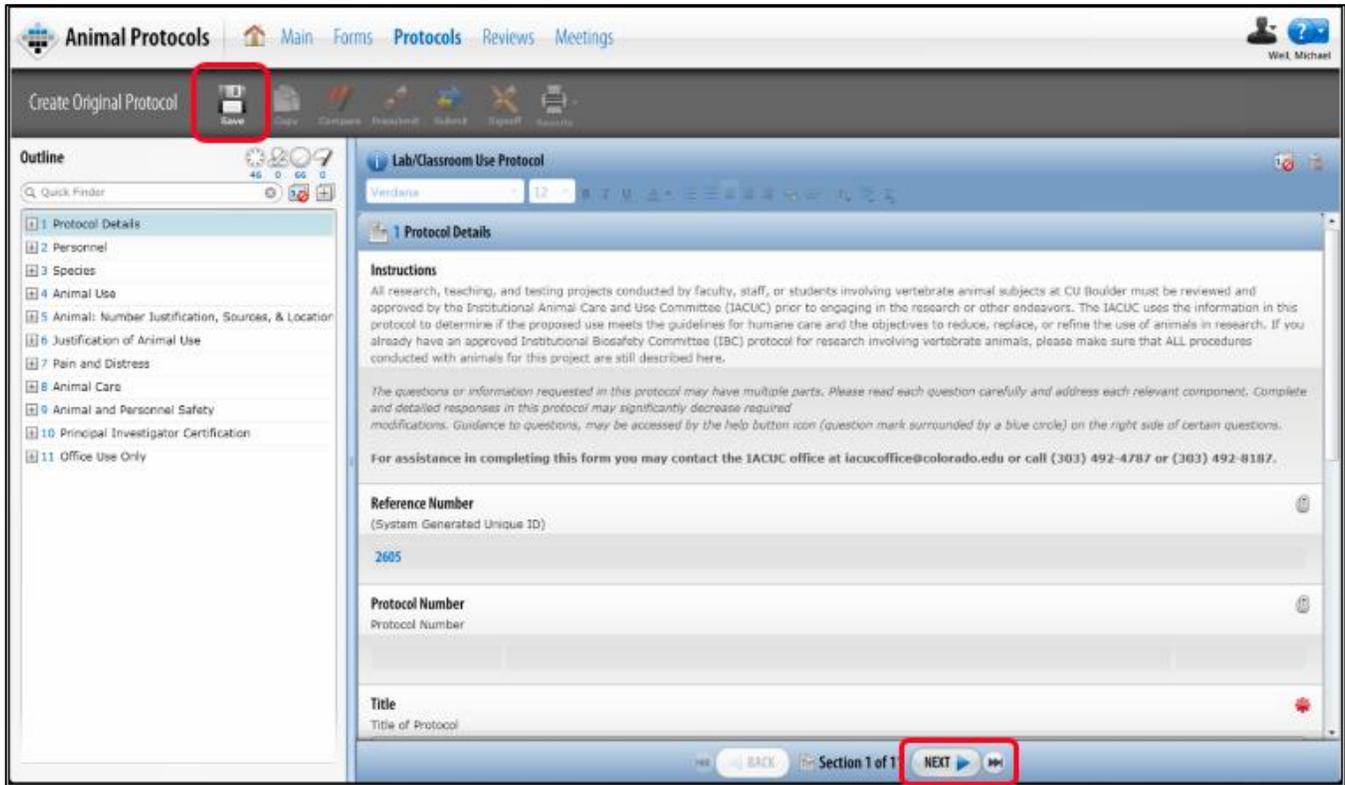
Quick Finder

Cancel

Navigating the Form

Step 1: Once you have selected the form, the protocol screen will display with an Outline of the sections and the corresponding questions.

Step 2: Complete the questions in each section. Some sections will include segments that must be completed, they are denoted with a red asterisk . Click on the **Next** button to advance to the next section. When finished, click the **Save** button.

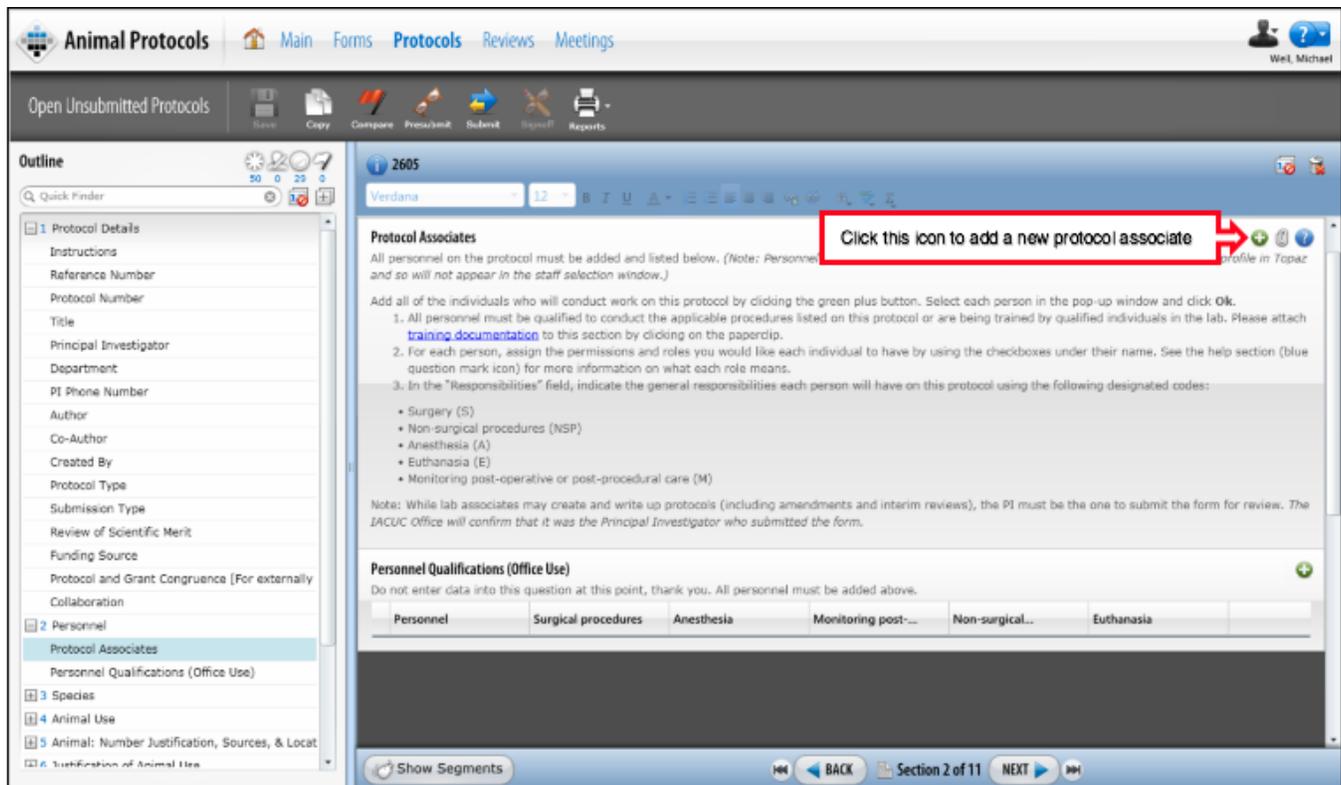


Step 3: Complete the questions in each section. Some sections will include segments that must be completed. Click on the **Next** button to advance to the next section. When finished, click the **Save** button.

	<p>The Required icon indicates that the question you are on must be completed in order to submit the form.</p>
	<p>The Attachment icon indicates a question that you can upload an attachment.</p>
	<p>The Add icon indicates an element that you can add additional information.</p>
	<p>The Add Image icon indicates that you can attach an image to the corresponding section.</p>

Completing the Original Protocol

Step 1: Sections 1 and 2: Protocol Details and Personnel – In these sections you will enter information about study personnel and funding. Adding personnel under **Protocol Associates** (section 2) allows you to specify staff members who will be working on the protocol. You will use the Staff Select grid to designate whether a staff member is **co-investigator**, **key associate**, or **authorized to order animals**. The people entered here will be available for selection later in the form.



The screenshot shows the 'Animal Protocols' software interface. The main content area is titled 'Protocol Associates' and contains instructions for adding personnel. A red box highlights a green plus icon in the top right corner of the main content area, with the text 'Click this icon to add a new protocol associate' pointing to it. Below the instructions is a table for 'Personnel Qualifications (Office Use)' with columns for 'Personnel', 'Surgical procedures', 'Anesthesia', 'Monitoring post...', 'Non-surgical...', and 'Euthanasia'. The interface also includes a navigation bar at the top with 'Main', 'Forms', 'Protocols', 'Reviews', and 'Meetings', and a sidebar on the left with an 'Outline' section.

Co-investigators have the same access privileges as the PI. If none of the boxes are checked then the staff member is considered an “other associate”; other associates are only able to view the approved protocol.

Step 2: Section 3: Species – Complete this section to report the species that will be used in the study. **The numbers in this section must match what you will enter per pain category or the highest level pain category an animal will experience.**

Example: If you order 300 animals at Category C but 100 of them will start at B then eventually end in D. You cannot pick experimental Pain Category B for those 100.

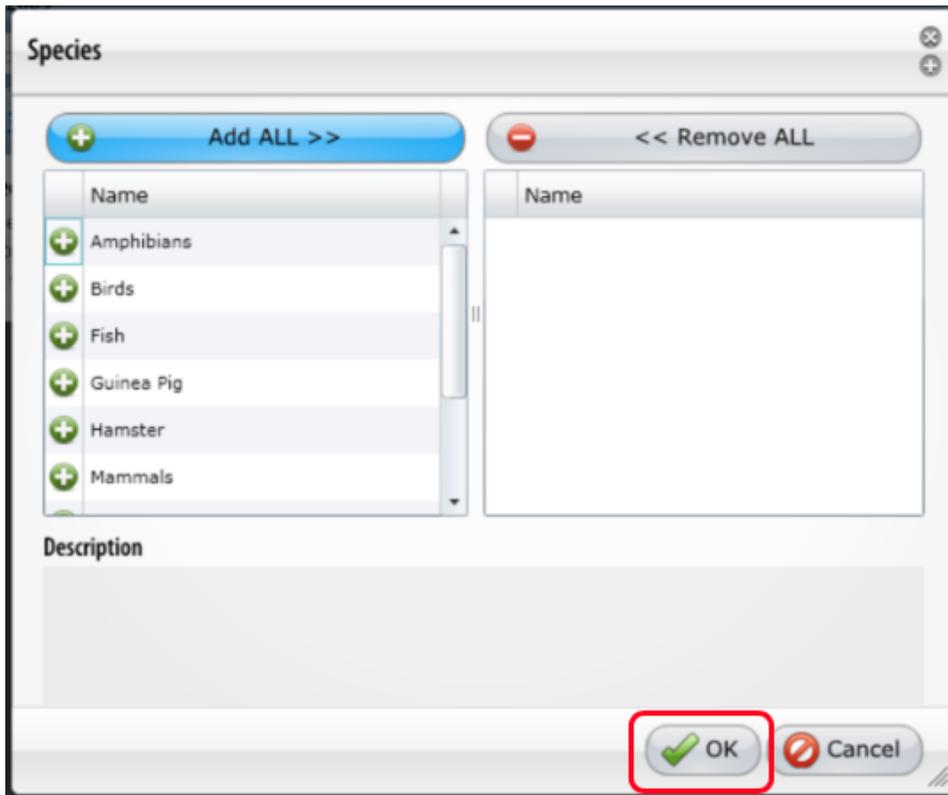
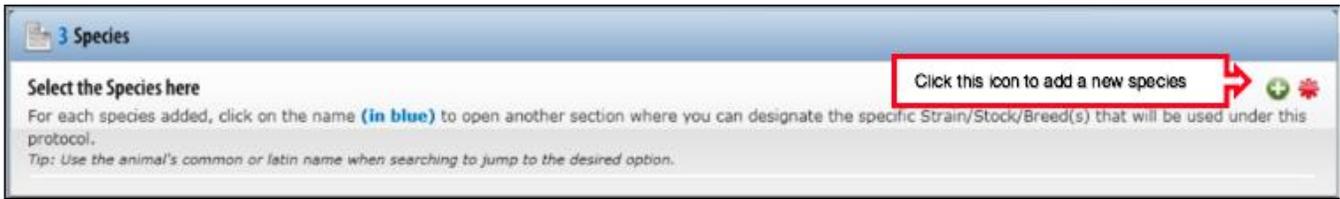
- **Scenario 1:** Only experience Category B
- **Scenario 2:** Only experience Category C
- **Scenario 3:** Will Experience B then C

In Topaz:

- Choose the highest category
- Explain transition in Sequence and Timing in Experimental Group

Select animals at highest pain category they will experience throughout the experiment.

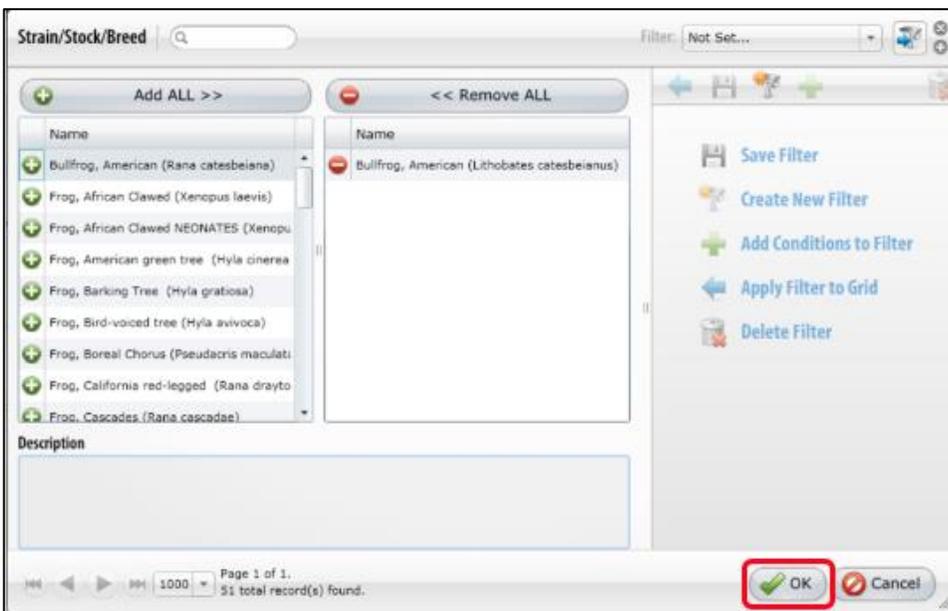
Under the **Species Selection** click the  icon. A Species selection window will appear. Locate the desired species in the list and click the  icon to add it to the keep list. When your list is complete, click the **OK** button. – The Species selection window will close.



On the protocol screen, you will see a list of species you selected. Click the **Show Segments** button. The first segment (i.e. the first species listed) will load. Complete all fields, as appropriate.

a. **Strain/Stock Breed**

- i. For each species you must select a Strain/Stock/Breed. The Strain/Stock/Breed subsection is the first question of the segment.
- ii. Click the  icon. The Strain/Stock/Breed selection window will appear. Locate the desired strain/stock/breed in the list and click the  icon to add it to the keep list. When your list is complete, click the **OK** button. – The Strain/Stock/Breed selection window will close.



- b. Click the **Save** icon. Click the **Show Sections** button. Complete any remaining segments (i.e. additional species segments). Click the **Next** button.

Step 3: Section 4: Animal Use – Enter the Abstract, any agents, breeding and more. Click the **Save** button. Click the **Next** button.

Step 4: Section 5: Animal: Number Justification, Sources & Location – Enter the facility where animals will be housed and answer the remaining questions. Click the **Save** button. Click the **Next** button.

Step 5: Section 6: Justification of Animal Use – Complete all fields to explain the rationale for animal use in this study. Click the **Save** button. Click the **Next** button.

Step 6: Section 7: Pain and Distress – Complete all fields to explain the and pain and distress during this study. Click the **Save** button. Click the **Next** button.

Step 7: Section 8: Animal Care – Enter the personnel responsible for the daily care of the animals, if it will be the OAR staff please state that. In the Special Care section select and of the check boxes that will be required for this protocol. – Click the **Save** button. Click the **Next** button.

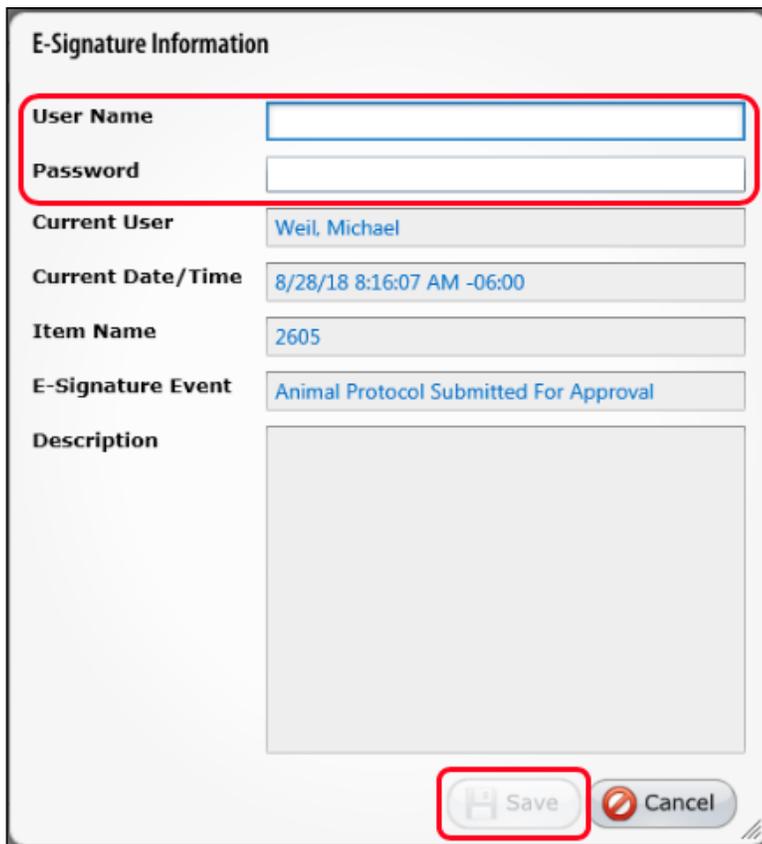
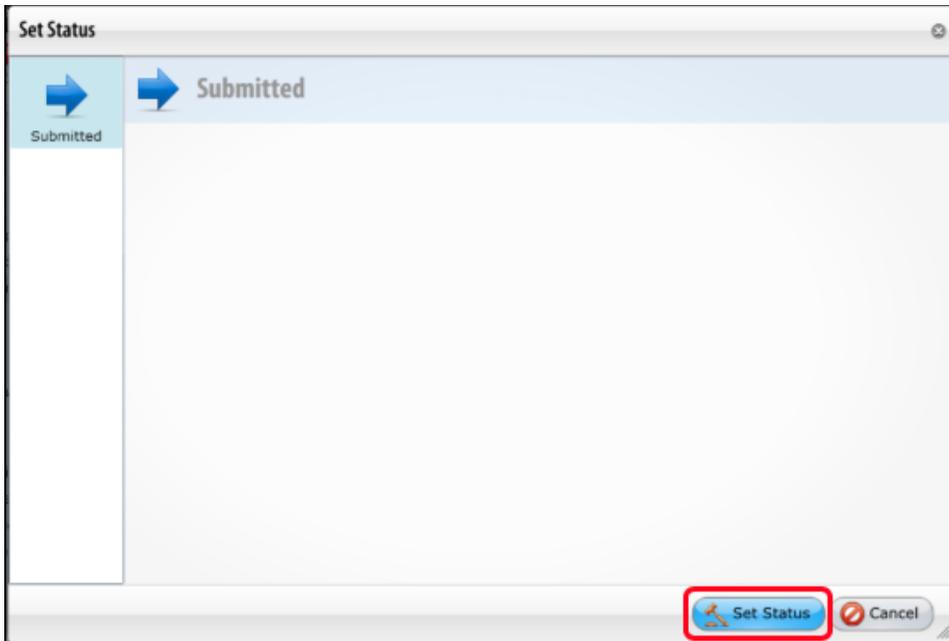
Step 8: Section 9: Animal and Personnel Safety – Disclose any concerns or procedures that may affect animal or personnel safety as well as the status of you and your research team’s conflict of Interest disclosures. In the “Additional Safety and Regulatory Reviews” select all that apply. – Click the **Save** button. Click the **Next** button.

Step 9: Section 10: Principal Investigator Certification – Read and complete the certification. Click the **Save** button.

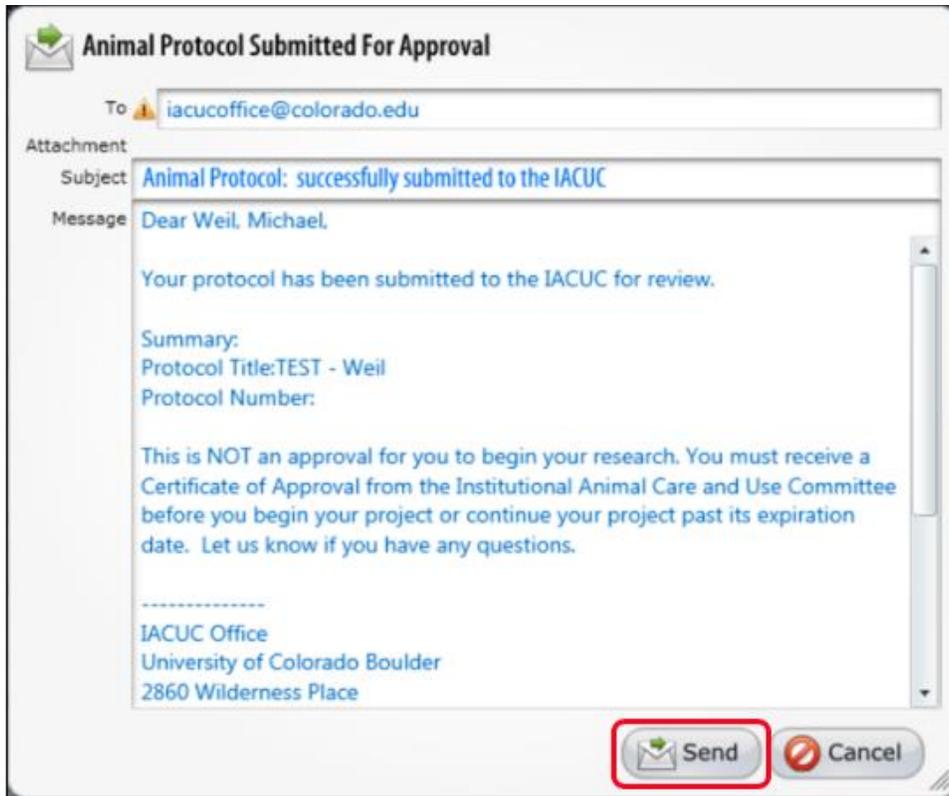
Step 10: You have completed the original protocol application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the 🚩 button in the Outline to address any problem areas.]



Step 11: Click **Set Status**. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.



Step 12: In the *Animal Protocol Submitted for Approval* window, click **Send** to email your protocol to the IACUC office.



Annual/Interim Review

An **interim review** protocol is used to provide an annual progress report when the study is not due for its three-year renewal. At interim review, it is possible to submit any amending changes to the original protocol.

Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

- For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- User experience is *greatly influenced* by the browser in use.
- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

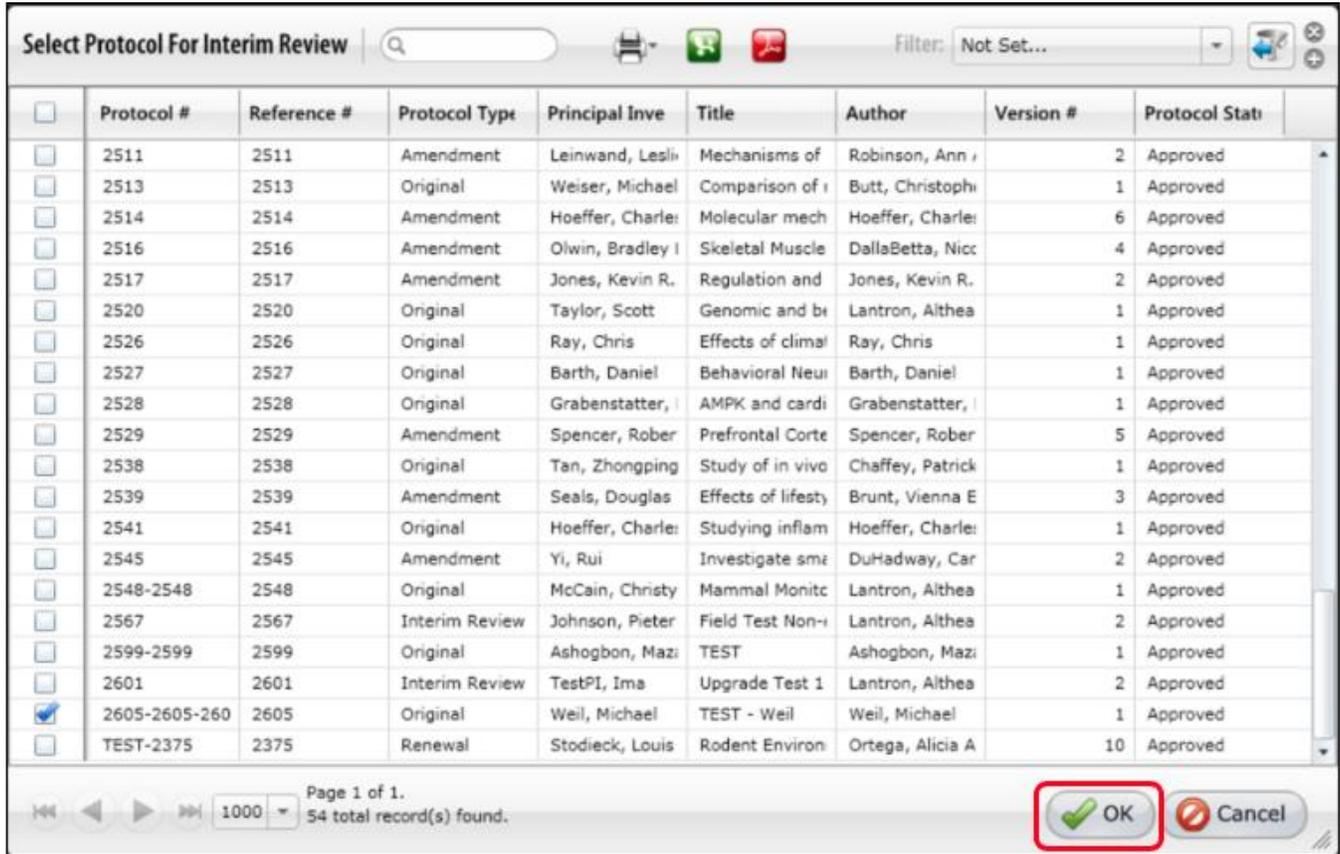
Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Interim Review Protocol**. – The screen will refresh and display the *Select Protocol For Interim Review* window with a list of your protocols that are eligible for an annual review.

- **Troubleshooting Tip:** If your protocol does not display, it is likely that a review or amendment has already been started. To check, click **Open Unsubmitted Protocols** from the *Protocols* menu.



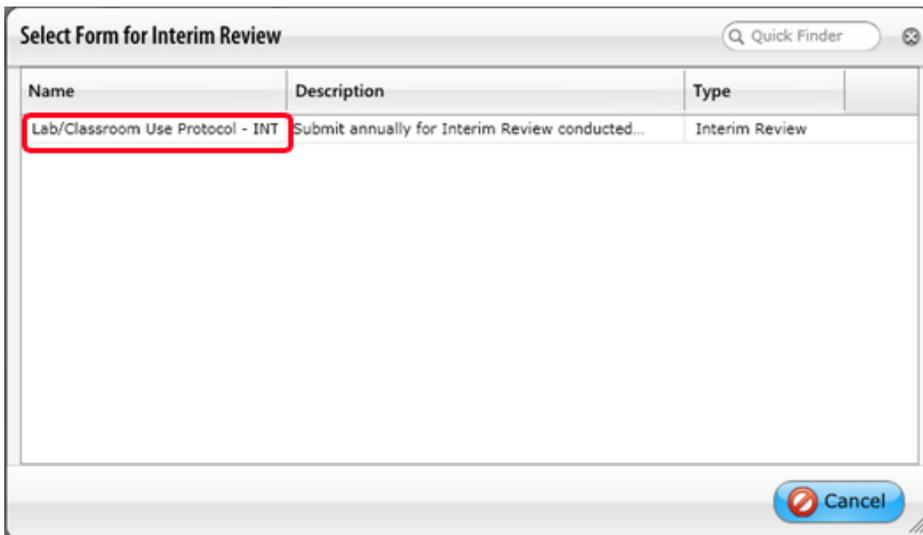
Step 4: Select the desired protocol and click the **OK** button. – The window will close and a *Select Form for Interim Review* window will appear.



The screenshot shows a window titled "Select Protocol For Interim Review" with a search bar and a filter dropdown set to "Not Set...". Below is a table with columns: Protocol #, Reference #, Protocol Type, Principal Inve, Title, Author, Version #, and Protocol Stati. The table contains 20 rows of protocol data. At the bottom, there are navigation controls, a page indicator "Page 1 of 1. 54 total record(s) found.", and two buttons: "OK" (highlighted with a red box) and "Cancel".

<input type="checkbox"/>	Protocol #	Reference #	Protocol Type	Principal Inve	Title	Author	Version #	Protocol Stati
<input type="checkbox"/>	2511	2511	Amendment	Leinwand, Lesli	Mechanisms of	Robinson, Ann	2	Approved
<input type="checkbox"/>	2513	2513	Original	Weiser, Michael	Comparison of	Butt, Christoph	1	Approved
<input type="checkbox"/>	2514	2514	Amendment	Hoeffler, Charle	Molecular mech	Hoeffler, Charle	6	Approved
<input type="checkbox"/>	2516	2516	Amendment	Olwin, Bradley I	Skeletal Muscle	DallaBetta, Nicc	4	Approved
<input type="checkbox"/>	2517	2517	Amendment	Jones, Kevin R.	Regulation and	Jones, Kevin R.	2	Approved
<input type="checkbox"/>	2520	2520	Original	Taylor, Scott	Genomic and bi	Lantron, Althea	1	Approved
<input type="checkbox"/>	2526	2526	Original	Ray, Chris	Effects of clima	Ray, Chris	1	Approved
<input type="checkbox"/>	2527	2527	Original	Barth, Daniel	Behavioral Neu	Barth, Daniel	1	Approved
<input type="checkbox"/>	2528	2528	Original	Grabenstatter, I	AMPK and cardi	Grabenstatter, I	1	Approved
<input type="checkbox"/>	2529	2529	Amendment	Spencer, Rober	Prefrontal Corte	Spencer, Rober	5	Approved
<input type="checkbox"/>	2538	2538	Original	Tan, Zhongping	Study of in vivo	Chaffey, Patrick	1	Approved
<input type="checkbox"/>	2539	2539	Amendment	Seals, Douglas	Effects of lifesty	Bruno, Vienna E	3	Approved
<input type="checkbox"/>	2541	2541	Original	Hoeffler, Charle	Studying inflam	Hoeffler, Charle	1	Approved
<input type="checkbox"/>	2545	2545	Amendment	Yi, Rui	Investigate smi	DuHadway, Car	2	Approved
<input type="checkbox"/>	2548-2548	2548	Original	McCain, Christy	Mammal Monitc	Lantron, Althea	1	Approved
<input type="checkbox"/>	2567	2567	Interim Review	Johnson, Pieter	Field Test Non-i	Lantron, Althea	2	Approved
<input type="checkbox"/>	2599-2599	2599	Original	Ashogbon, Mazi	TEST	Ashogbon, Mazi	1	Approved
<input type="checkbox"/>	2601	2601	Interim Review	TestPI, Ima	Upgrade Test 1	Lantron, Althea	2	Approved
<input checked="" type="checkbox"/>	2605-2605-260	2605	Original	Weil, Michael	TEST - Weil	Weil, Michael	1	Approved
<input type="checkbox"/>	TEST-2375	2375	Renewal	Stodieck, Louis	Rodent Environ	Ortega, Alicia A	10	Approved

Step 5: Select **Lab/Classroom Use Protocol – INTERIM/ANNUAL REVIEW**. (If this applies to a Transition protocol, the form will be called Transition Protocol – INTERIM/ANNUAL REVIEW.)

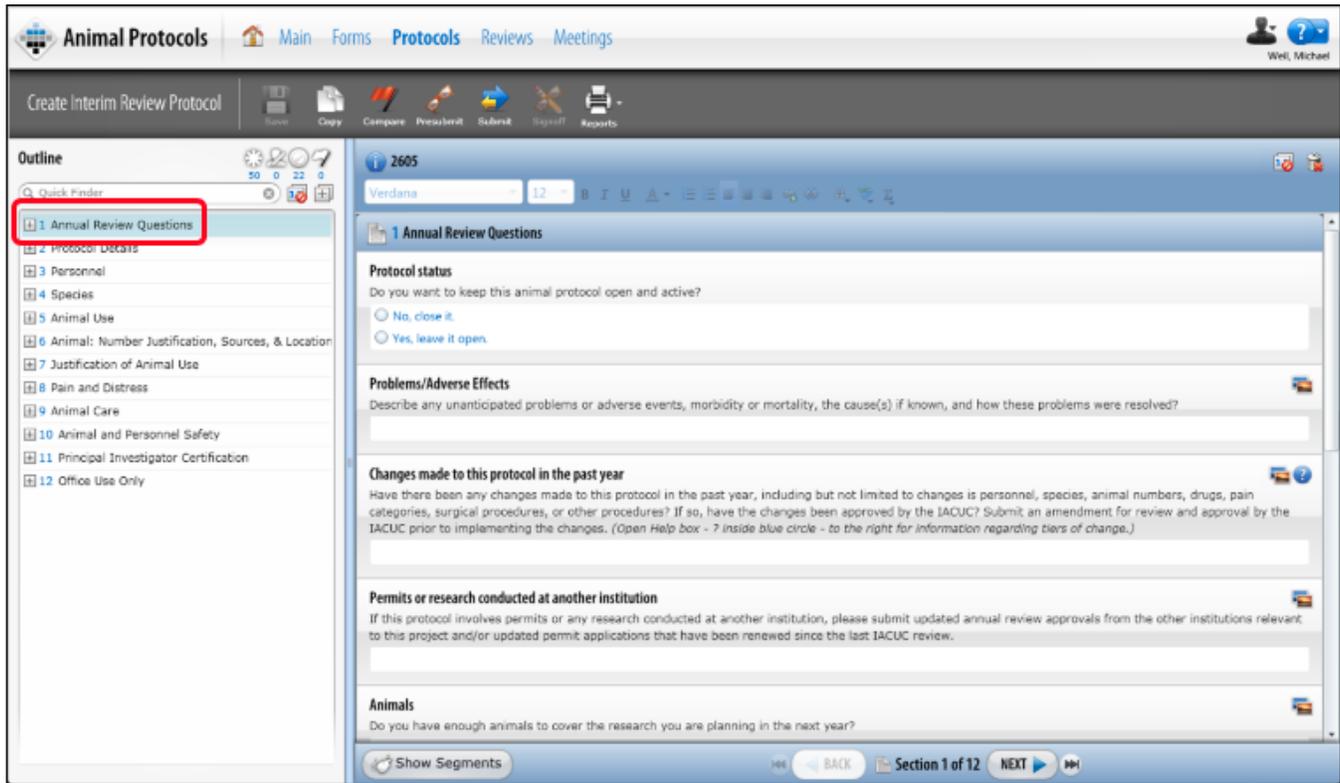


The screenshot shows a window titled "Select Form for Interim Review" with a "Quick Finder" search bar. Below is a table with columns: Name, Description, and Type. The first row is highlighted with a red box. At the bottom right, there is a "Cancel" button.

Name	Description	Type
Lab/Classroom Use Protocol - INT	Submit annually for Interim Review conducted...	Interim Review

- The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. The interim review will include the information you submitted with any previous submissions. It will also include a new section called *Annual Review Questions*.

Step 6: Complete the questions in **Section 1: Annual Review Questions**.



	<p>The Required icon indicates that the question you are on must be completed in order to submit the form.</p>
	<p>The Attachment icon indicates a question that you can upload an attachment.</p>
	<p>The Add icon indicates an element that you can add additional information.</p>
	<p>The Add Image icon indicates that you can attach an image to the corresponding section.</p>

- If you submitted an annual review for this protocol for the previous year, this field will populate with the previous content. It is expected that you **OVERWRITE** the former content. (The content from the previous review is **SAVED** as another version of this protocol, so you will not be losing this content if deleted.)

- If there were any changes that are considered an administrative change, edit any of the original sections that are affected. Administrative changes include:
 - Less than 15% change in animal numbers from original protocol, strain, or variety if there are no animal health issues
 - funding source
 - typographical
 - personnel other than PI
 - animal source
 - IACUC approved location
- a. **Protocol Status:** Confirm whether you wish to continue the study or permanently close it. If this is your third annual review, do not complete this form. Go to **Protocols > Create Renewal Protocol** in the top navigation bar to complete the renewal form instead.
- b. **Problems/Adverse Effects:** Describe if there were any unanticipated problems or adverse events, morbidity or mortality, the cause(s) if known, and how these problems were resolved.
- c. **Changes made to this protocol in the past year:** Explain whether there had been any changes made to the protocol within the past year.
- d. **Permits or research conducted at another institution:** If this protocol involves permits or any research conducted at another institution, attach annual review approvals or updated permits to this section.
- e. **Animals:** Confirm if you have enough animals for the research you are planning in the coming year.

Step 7: You have completed the interim review application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the 🌸 button in the Outline to address any problem areas.]

Step 8: Click **Set Status**. Then click **Submit**, again. [Fix any required items.]

Step 9: Click **Set Status**, again. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.

Step 10: In the *Animal Protocol Submitted for Approved* window, click **Send** to email your protocol to the IACUC office.

Amendment

An **amendment** should be submitted if you need to make changes to an approved study. You can submit an amendment at any time during the lifetime of the study. If your study is nearing interim review, you can simultaneously submit any amending changes in that submission.

Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

- For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- User experience is *greatly influenced* by the browser in use.
- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

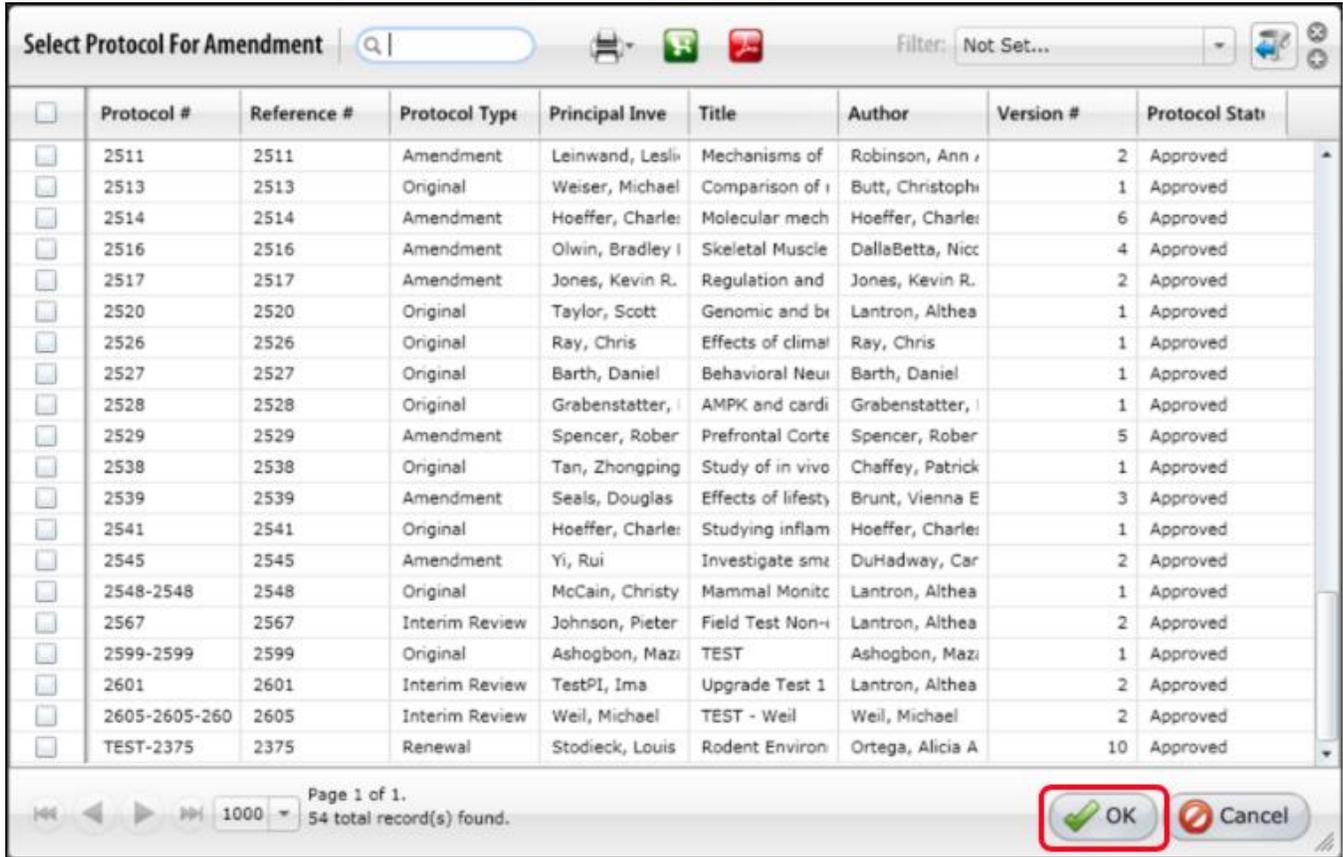
Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Amendment Protocol**. – The screen will refresh and display the *Select Protocol For Interim Review* window with a list of your protocols that are eligible for an annual review.

- **Troubleshooting Tip:** If your protocol does not display, it is likely that a review or amendment has already been started. To check, click **Open Unsubmitted Protocols** from the *Protocols* menu.



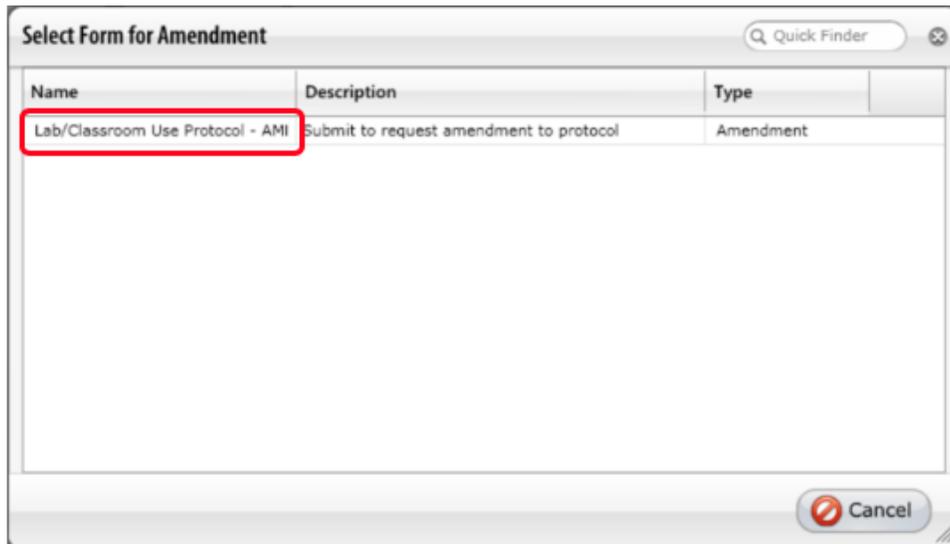
Step 4: Select the desired protocol and click the **OK** button. – The window will close and a *Select Form for Amendment* window will appear.



The screenshot shows a window titled "Select Protocol For Amendment" with a search bar and a filter set to "Not Set...". Below is a table with columns: Protocol #, Reference #, Protocol Type, Principal Inve, Title, Author, Version #, and Protocol Stati. The table lists 20 protocols, all with a status of "Approved". At the bottom right, the "OK" button is highlighted with a red box.

Protocol #	Reference #	Protocol Type	Principal Inve	Title	Author	Version #	Protocol Stati
2511	2511	Amendment	Leinwand, Leslie	Mechanisms of	Robinson, Ann	2	Approved
2513	2513	Original	Weiser, Michael	Comparison of	Butt, Christoph	1	Approved
2514	2514	Amendment	Hoeffler, Charles	Molecular mech	Hoeffler, Charles	6	Approved
2516	2516	Amendment	Olwin, Bradley I	Skeletal Muscle	DallaBetta, Nicc	4	Approved
2517	2517	Amendment	Jones, Kevin R.	Regulation and	Jones, Kevin R.	2	Approved
2520	2520	Original	Taylor, Scott	Genomic and bi	Lantron, Althea	1	Approved
2526	2526	Original	Ray, Chris	Effects of clima	Ray, Chris	1	Approved
2527	2527	Original	Barth, Daniel	Behavioral Neu	Barth, Daniel	1	Approved
2528	2528	Original	Grabenstatter, I	AMPK and cardi	Grabenstatter, I	1	Approved
2529	2529	Amendment	Spencer, Rober	Prefrontal Corte	Spencer, Rober	5	Approved
2538	2538	Original	Tan, Zhongping	Study of in vivo	Chaffey, Patrick	1	Approved
2539	2539	Amendment	Seals, Douglas	Effects of lifesty	Brunt, Vienna E	3	Approved
2541	2541	Original	Hoeffler, Charles	Studying inflam	Hoeffler, Charles	1	Approved
2545	2545	Amendment	Yi, Rui	Investigate smz	DuHadway, Car	2	Approved
2548-2548	2548	Original	McCain, Christy	Mammal Monitc	Lantron, Althea	1	Approved
2567	2567	Interim Review	Johnson, Pieter	Field Test Non-i	Lantron, Althea	2	Approved
2599-2599	2599	Original	Ashogbon, Mazi	TEST	Ashogbon, Mazi	1	Approved
2601	2601	Interim Review	TestPI, Ima	Upgrade Test 1	Lantron, Althea	2	Approved
2605-2605-260	2605	Interim Review	Weil, Michael	TEST - Weil	Weil, Michael	2	Approved
TEST-2375	2375	Renewal	Stodieck, Louis	Rodent Environ	Ortega, Alicia A	10	Approved

Step 5: Select **Lab/Classroom Use Protocol – AMENDMENT**. (If you are submitting an amendment for a Transition protocol, the form will be called *Transition Protocol – AMENDMENT*.)

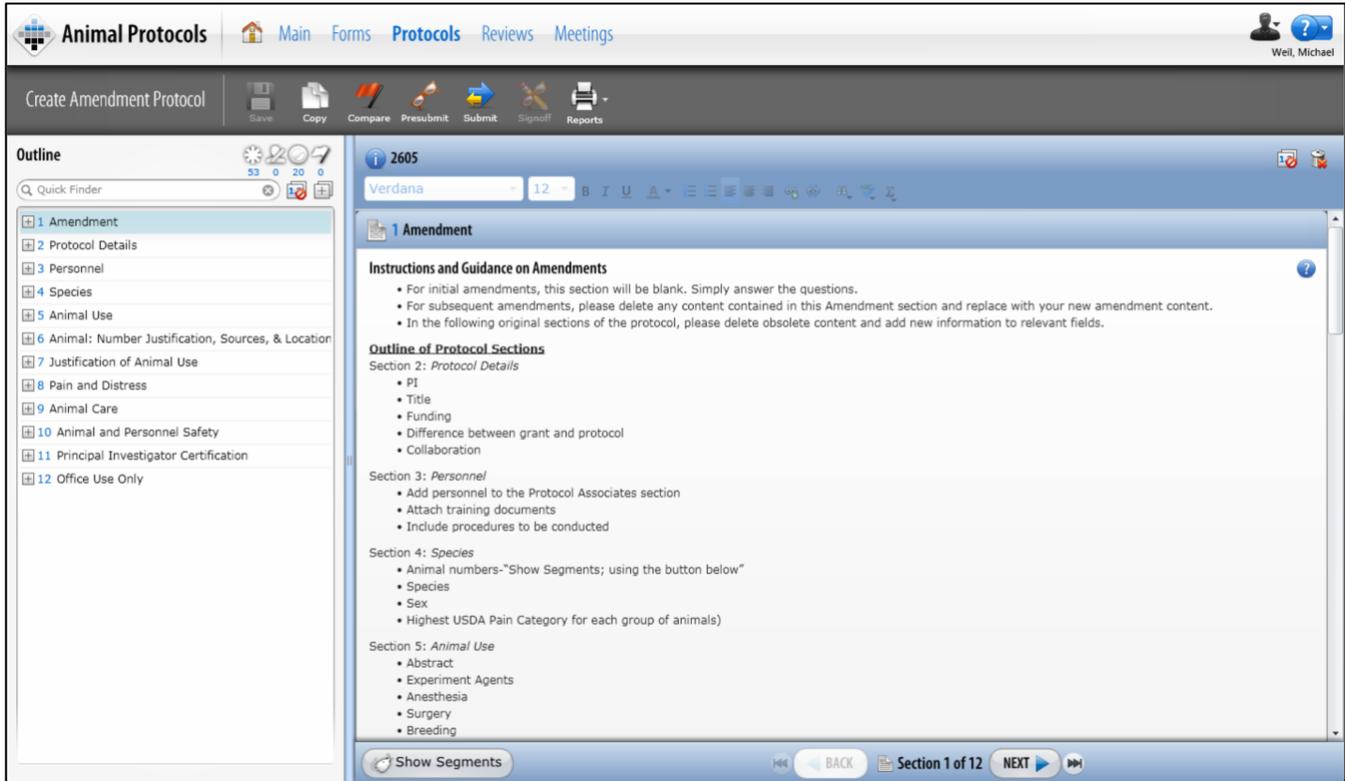


The screenshot shows a window titled "Select Form for Amendment" with a "Quick Finder" search bar. Below is a table with columns: Name, Description, and Type. The first row is highlighted with a red box.

Name	Description	Type
Lab/Classroom Use Protocol - AMI	Submit to request amendment to protocol	Amendment

- The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. The amendment will include the information you submitted with your Original protocol. It will also include a new section called *Amendment*.

Step 6: Complete the questions in **Section 1: Amendment**.



	<p>The Required icon indicates that the question you are on must be completed in order to submit the form.</p>
	<p>The Attachment icon indicates a question that you can upload an attachment.</p>
	<p>The Add icon indicates an element that you can add additional information.</p>
	<p>The Add Image icon indicates that you can attach an image to the corresponding section.</p>

- If you have submitted an amendment to this protocol in the past, this field will populate with the previous content. It is expected that you **OVERWRITE** the former content. (The content from the previous amendment is **SAVED** as another version of this protocol, so you will not be losing this content when deleted.)

- a. **List the proposed changes to the protocol** – Briefly list each proposed change. Only enter one change per line (i.e. hard return after each listed item). Do not describe changes here. Edit any of the original sections if it will be affected by the addendum.
- b. **Clinical illness, pain, distress, or other health issues** – Confirm whether or not you expect the animals to experience illness, pain distress, or other health issues as a result of this addendum. If yes, you will need to modify **Section 6.5** of the *Study Objectives* to explain. If a new procedure, add a new pain Category D or E and you must conduct a new literature search for the new procedure. Report the databases used in your literature search.
- c. **Other concerns**
- d. **Potentially adverse events**

Step 7: Update the remaining protocol sections as needed.

NOTE: Do NOT delete any previous information from these sections UNLESS you are removing it from the protocol. If anything is deleted, it will no longer be approved.

Step 8: You have completed the renewal application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the  button in the Outline to address any problem areas.]

Step 9: Click **Set Status**. Then click **Submit**, again. [Fix any required items.]

Step 10: Click **Set Status**, again. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.

Step 11: In the *Animal Protocol Submitted for Approved* window, click **Send** to email your protocol to the IACUC office.

Submit A Renewal (Every 3 Years)

A **renewal** protocol is submitted every three years following initial approval (i.e. year three of approval, year six of approval, year nine of approval, etc.). During renewal you can make amending changes to the original protocol, if desired.

NOTE: If the expiring protocol is a **Transition** protocol, i.e. created outside of Topaz and converted from a PDF, you must submit an [Original Protocol](#). You cannot renew transition protocols because the converted form only contains basic identifying information.

Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

- For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
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- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

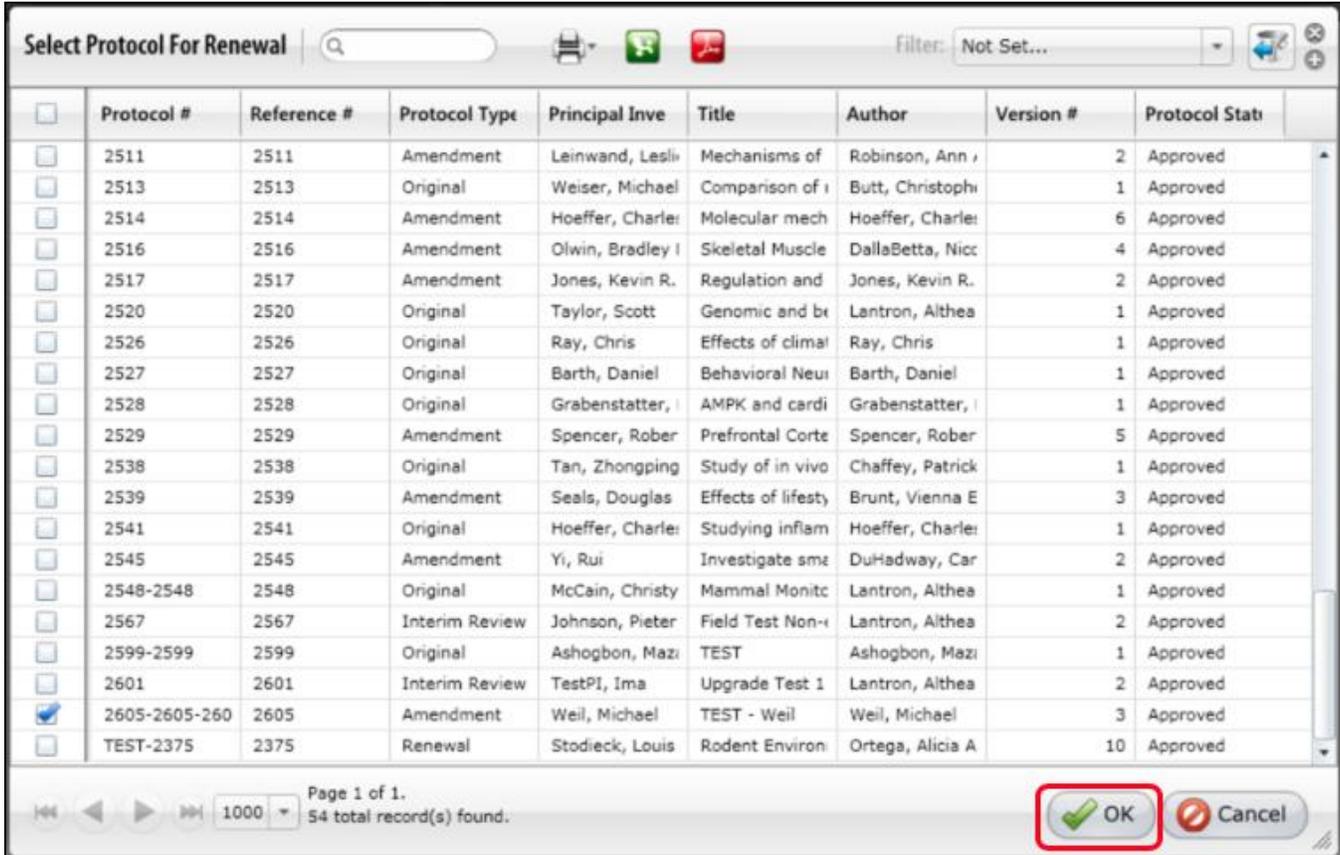
Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Renewal Protocol**. – The screen will refresh and display the *Select Protocol For Interim Review* window with a list of your protocols that are eligible for an annual review.

- **Troubleshooting Tip:** If your protocol does not display, it is likely that a review or amendment has already been started. To check, click **Open Unsubmitted Protocols** from the *Protocols* menu. If so, you must delete or submit the form in progress before creating a new protocol.



Step 4: Select the desired protocol and click the **OK** button. – The window will close and a Select Protocol for Renewal window will appear. (The window will be empty if you try to renew a Transition protocol because you cannot renew a transition protocol. please submit an [Original Protocol.](#))

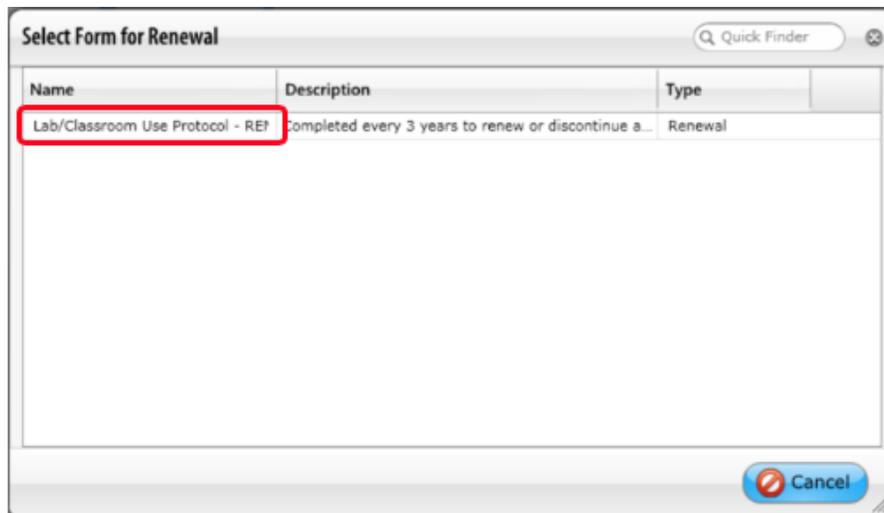


<input type="checkbox"/>	Protocol #	Reference #	Protocol Type	Principal Inve	Title	Author	Version #	Protocol Stati
<input type="checkbox"/>	2511	2511	Amendment	Leinwand, Lesli	Mechanisms of	Robinson, Ann	2	Approved
<input type="checkbox"/>	2513	2513	Original	Weiser, Michael	Comparison of i	Butt, Christoph	1	Approved
<input type="checkbox"/>	2514	2514	Amendment	Hoeffler, Charle	Molecular mech	Hoeffler, Charle	6	Approved
<input type="checkbox"/>	2516	2516	Amendment	Olwin, Bradley I	Skeletal Muscle	DallaBetta, Nicc	4	Approved
<input type="checkbox"/>	2517	2517	Amendment	Jones, Kevin R.	Regulation and	Jones, Kevin R.	2	Approved
<input type="checkbox"/>	2520	2520	Original	Taylor, Scott	Genomic and br	Lantron, Althea	1	Approved
<input type="checkbox"/>	2526	2526	Original	Ray, Chris	Effects of clima	Ray, Chris	1	Approved
<input type="checkbox"/>	2527	2527	Original	Barth, Daniel	Behavioral Neu	Barth, Daniel	1	Approved
<input type="checkbox"/>	2528	2528	Original	Grabenstatter, I	AMPK and cardi	Grabenstatter, I	1	Approved
<input type="checkbox"/>	2529	2529	Amendment	Spencer, Rober	Prefrontal Corte	Spencer, Rober	5	Approved
<input type="checkbox"/>	2538	2538	Original	Tan, Zhongping	Study of in vivo	Chaffey, Patrick	1	Approved
<input type="checkbox"/>	2539	2539	Amendment	Seals, Douglas	Effects of lifesty	Brunst, Vienna E	3	Approved
<input type="checkbox"/>	2541	2541	Original	Hoeffler, Charle	Studying inflam	Hoeffler, Charle	1	Approved
<input type="checkbox"/>	2545	2545	Amendment	Yi, Rui	Investigate smz	DuHadway, Car	2	Approved
<input type="checkbox"/>	2548-2548	2548	Original	McCain, Christy	Mammal Monitc	Lantron, Althea	1	Approved
<input type="checkbox"/>	2567	2567	Interim Review	Johnson, Pieter	Field Test Non-i	Lantron, Althea	2	Approved
<input type="checkbox"/>	2599-2599	2599	Original	Ashogbon, Mazi	TEST	Ashogbon, Mazi	1	Approved
<input type="checkbox"/>	2601	2601	Interim Review	TestPI, Ima	Upgrade Test 1	Lantron, Althea	2	Approved
<input checked="" type="checkbox"/>	2605-2605-260	2605	Amendment	Weil, Michael	TEST - Weil	Weil, Michael	3	Approved
<input type="checkbox"/>	TEST-2375	2375	Renewal	Stodieck, Louis	Rodent Environ	Ortega, Alicia A	10	Approved

Page 1 of 1.
54 total record(s) found.

OK Cancel

Step 5: Select **Lab/Classroom Use Protocol – RENEWAL**. – The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. It will also include a new section called *Renewal*.

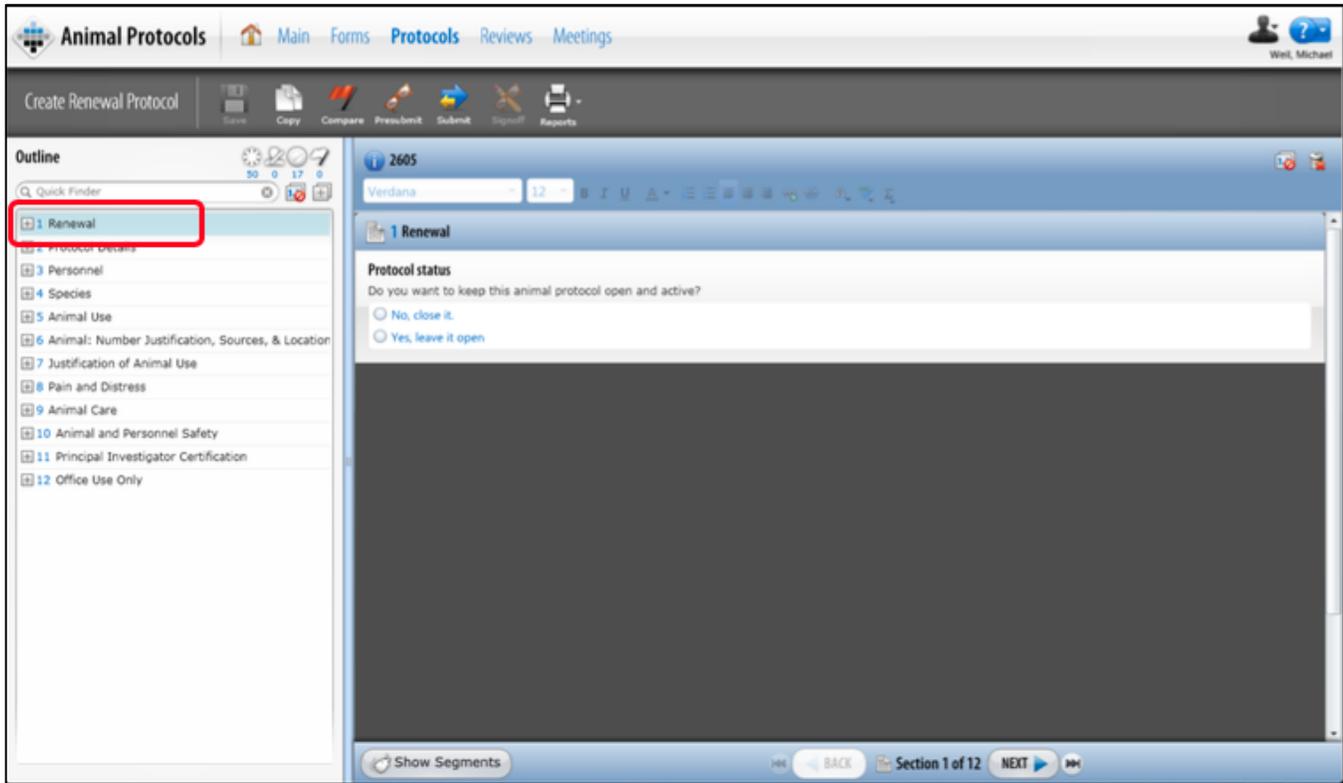


Name	Description	Type
Lab/Classroom Use Protocol - RE	completed every 3 years to renew or discontinue a...	Renewal

Cancel

- The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. The interim review will include the information you submitted with any previous submissions. It will also include a new section called *Annual Review Questions*.

Step 6: Complete the questions in **Section 1: Renewal**.



	<p>The Required icon indicates that the question you are on must be completed in order to submit the form.</p>
	<p>The Attachment icon indicates a question that you can upload an attachment.</p>
	<p>The Add icon indicates an element that you can add additional information.</p>
	<p>The Add Image icon indicates that you can attach an image to the corresponding section.</p>

- If you submitted an amendment to this protocol for the previous year, this field will populate with the previous content. It is expected that you **OVERWRITE** the former content. (The content from the previous review is **SAVED** as another version of this protocol, so you will not be losing this content if deleted.)

- a. **Protocol Status:** Confirm whether you wish to continue the study or permanently close it. Your selection will determine which follow-up questions will be displayed.
 - i. **If permanently closing:** Confirm whether the animals on this protocol are alive and being housed. You should also describe any unanticipated problems or adverse events, morbidity or mortality, the cause(s) if known, and how these problems were resolved. Lastly, provide information on the progress made during the approval period.
 - ii. **If requesting renewal:** Describe any unanticipated problems or adverse events, morbidity or mortality, the cause(s) if known, and how these problems were resolved. Explain any changes that were made in the last year and provide information on the progress made during the approval period.

Step 7: Update the remaining protocol sections as needed and click **Save**.

Step 8: You have completed the renewal application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the ❗ button in the Outline to address any problem areas.]

Step 9: Click **Set Status**. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.

Step 10: In the *Animal Protocol Submitted for Approved* window, click **Send** to email your protocol to the IACUC office.

2. Elicit Pre-Review Feedback via PDF (Do Not Use “Presubmit”)

You will have noticed the Presubmit button in the toolbar. Use this to provide **view-only access** to others for the life of your protocol. Please note, **they will NOT be able to provide comments within Topaz**. They can only view. **To elicit feedback, print a Protocol Detail Report (PDF) and email it to exchange comments offline.**

Create Protocol Detail Report (PDF)

Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

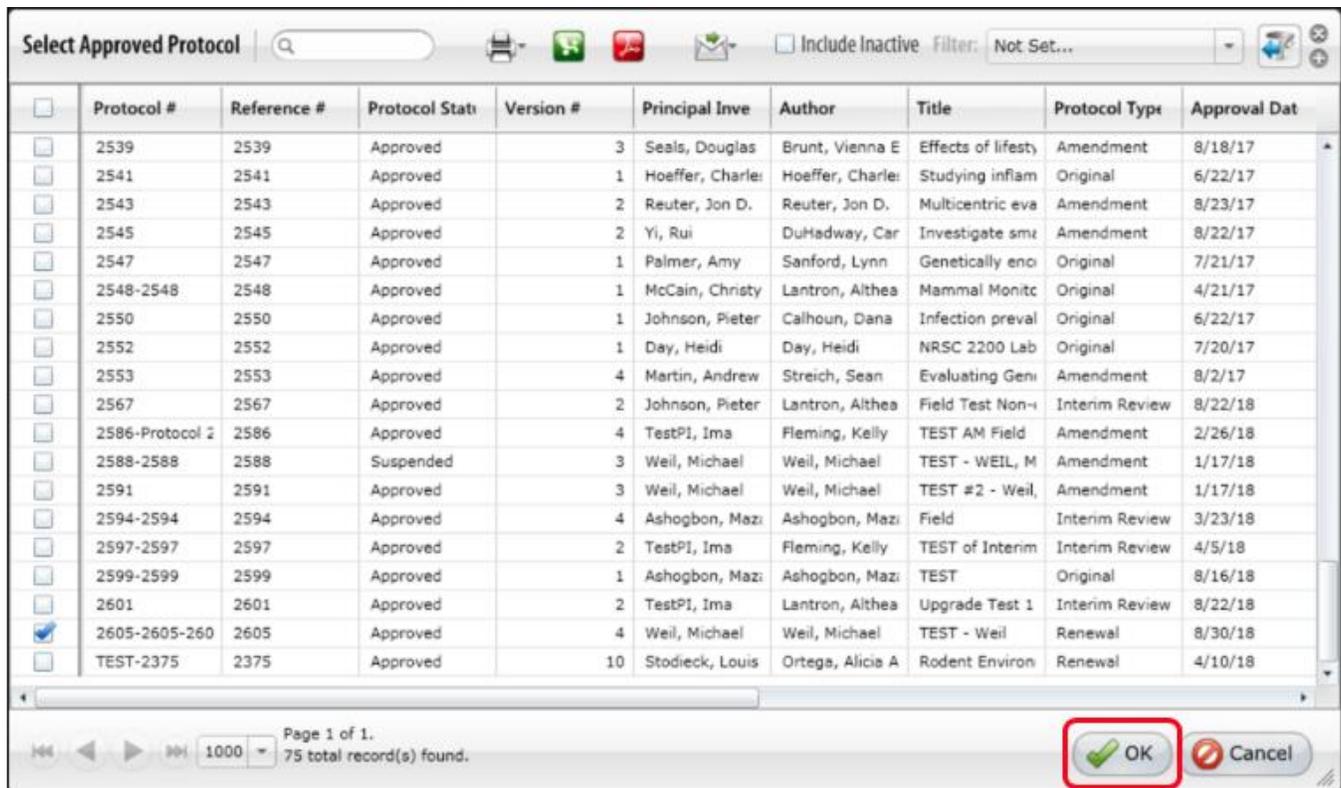
- For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- User experience is *greatly influenced* by the browser in use.
- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

Step 2: Under *Compliance* click on **Animal Protocols**.

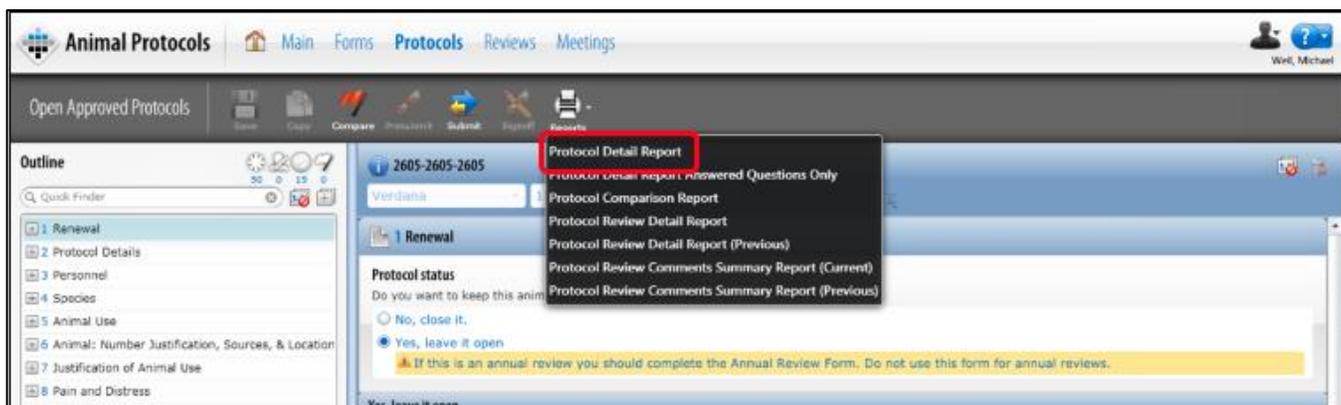
Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select the **appropriate type of protocol** – The screen will refresh and display the *according protocol* window with a list of your protocols that are eligible for an annual review.



Step 4: Select the desired protocol and click the **OK** button. – The window will close and a protocol window will appear.



Step 5: Click on **Reports** and select **Protocol Detail Report**. DO NOT select *Presubmit*.



Step 6: Download the report to your local hard drive. (The file will be in a PDF format. We recommend using Adobe's comment tool.)

Remove Pre-Submission Reviewer (if added previously)

Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

- For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- User experience is *greatly influenced* by the browser in use.
- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **the appropriate type of protocol** – The screen will refresh and display the *according protocol* window with a list of your protocols that are eligible for an annual review.



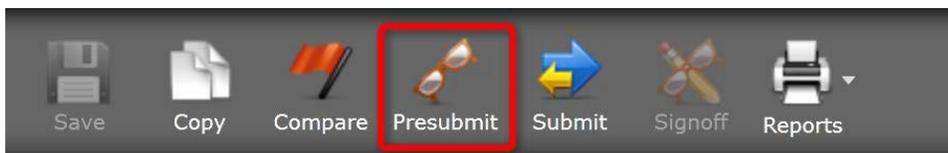
Step 4: Select the desired protocol and click the **OK** button. – The window will close and a protocol window will appear.

Select Approved Protocol

<input type="checkbox"/>	Protocol #	Reference #	Protocol Stat	Version #	Principal Inve	Author	Title	Protocol Type	Approval Dat
<input type="checkbox"/>	2539	2539	Approved	3	Seals, Douglas	Brunt, Vienna E	Effects of lifesty	Amendment	8/18/17
<input type="checkbox"/>	2541	2541	Approved	1	Hoeffler, Charle	Hoeffler, Charle	Studying inflam	Original	6/22/17
<input type="checkbox"/>	2543	2543	Approved	2	Reuter, Jon D.	Reuter, Jon D.	Multicentric eva	Amendment	8/23/17
<input type="checkbox"/>	2545	2545	Approved	2	Yi, Rui	DuHedway, Car	Investigate sm	Amendment	8/22/17
<input type="checkbox"/>	2547	2547	Approved	1	Palmer, Amy	Sanford, Lynn	Genetically enc	Original	7/21/17
<input type="checkbox"/>	2548-2548	2548	Approved	1	McCain, Christy	Lantron, Althea	Mammal Monitc	Original	4/21/17
<input type="checkbox"/>	2550	2550	Approved	1	Johnson, Pieter	Calhoun, Dana	Infection preval	Original	6/22/17
<input type="checkbox"/>	2552	2552	Approved	1	Day, Heidi	Day, Heidi	NRSC 2200 Lab	Original	7/20/17
<input type="checkbox"/>	2553	2553	Approved	4	Martin, Andrew	Streich, Sean	Evaluating Gen	Amendment	8/2/17
<input type="checkbox"/>	2567	2567	Approved	2	Johnson, Pieter	Lantron, Althea	Field Test Non-i	Interim Review	8/22/18
<input type="checkbox"/>	2586-Protocol 2	2586	Approved	4	TestPI, Ima	Fleming, Kelly	TEST AM Field	Amendment	2/26/18
<input type="checkbox"/>	2588-2588	2588	Suspended	3	Weil, Michael	Weil, Michael	TEST - WEIL, M	Amendment	1/17/18
<input type="checkbox"/>	2591	2591	Approved	3	Weil, Michael	Weil, Michael	TEST #2 - Weil,	Amendment	1/17/18
<input type="checkbox"/>	2594-2594	2594	Approved	4	Ashogbon, Mazi	Ashogbon, Mazi	Field	Interim Review	3/23/18
<input type="checkbox"/>	2597-2597	2597	Approved	2	TestPI, Ima	Fleming, Kelly	TEST of Interim	Interim Review	4/5/18
<input type="checkbox"/>	2599-2599	2599	Approved	1	Ashogbon, Maz	Ashogbon, Mazi	TEST	Original	8/16/18
<input type="checkbox"/>	2601	2601	Approved	2	TestPI, Ima	Lantron, Althea	Upgrade Test 1	Interim Review	8/22/18
<input checked="" type="checkbox"/>	2605-2605-260	2605	Approved	4	Weil, Michael	Weil, Michael	TEST - Weil	Renewal	8/30/18
<input type="checkbox"/>	TEST-2375	2375	Approved	10	Stodieck, Louis	Ortega, Alicia A	Rodent Environ	Renewal	4/10/18

Page 1 of 1.
75 total record(s) found.

Step 5: Click on **Presubmit**.



Save Copy Compare **Presubmit** Submit Signoff Reports

Step 6: Click on the **remove icon** .

3. Animal Orders

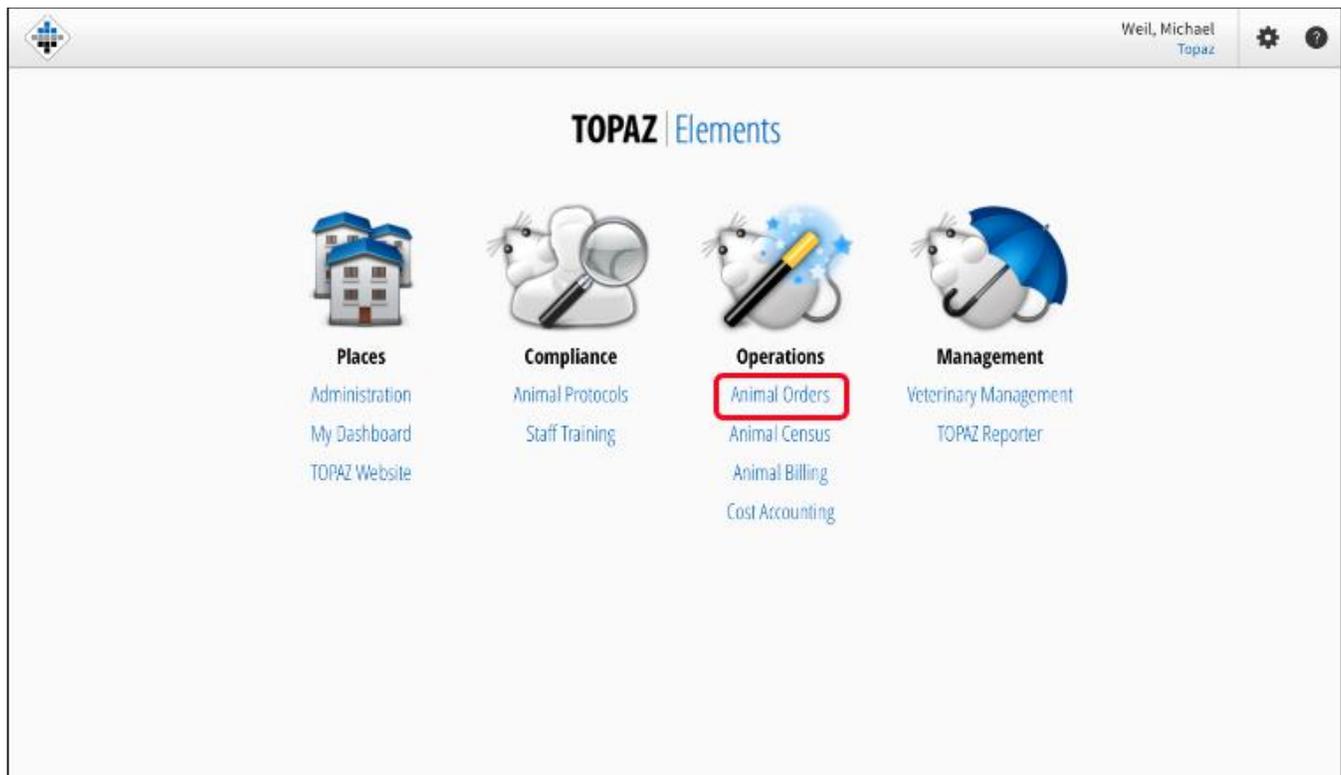
You can submit an animal order in Topaz for any approved protocol. Animal orders can be scheduled for a single delivery or a standing order. The following tutorials explain how to create an order and schedule delivery.

How To Order Animals

Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

- For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- User experience is *greatly influenced* by the browser in use.
- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

Step 2: Under *Operations* click on **Animal Orders**. [You may need to navigate to the *Topaz Elements* page.]



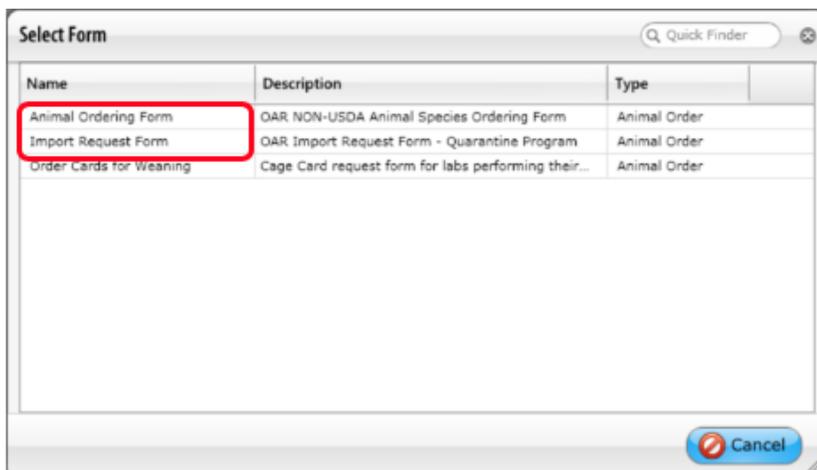
Step 3: Hover (with your cursor) over *Orders* and a menu will appear. Select **Create New Order** – The screen will refresh and a *Select Form* window is displayed.



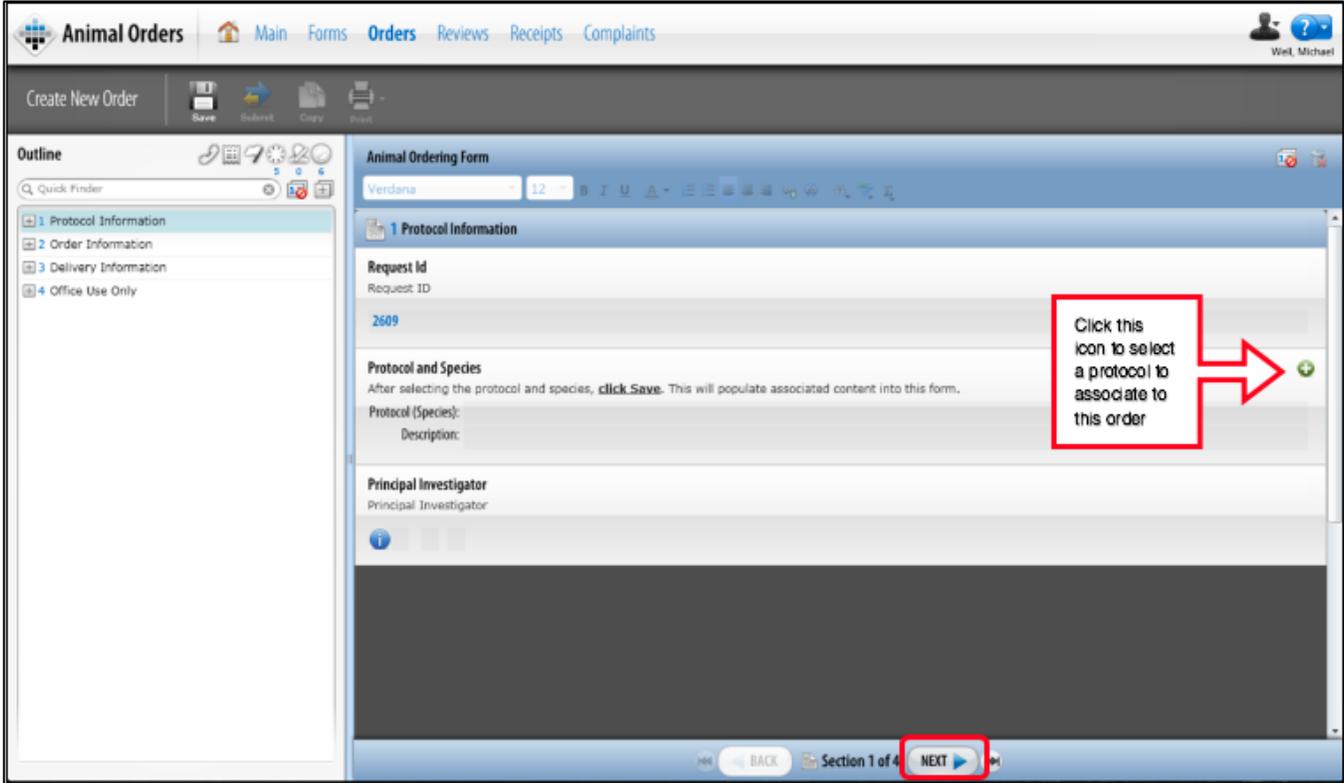
Step 4: Select either:

- **Animal Ordering Form** (the most commonly used form) if ordering from a commercial vendor.
- **Import Request Form** if acquiring animals from another source such as another University.

The menu will close and the screen will display the animal order screen with an Outline of the sections and corresponding questions.

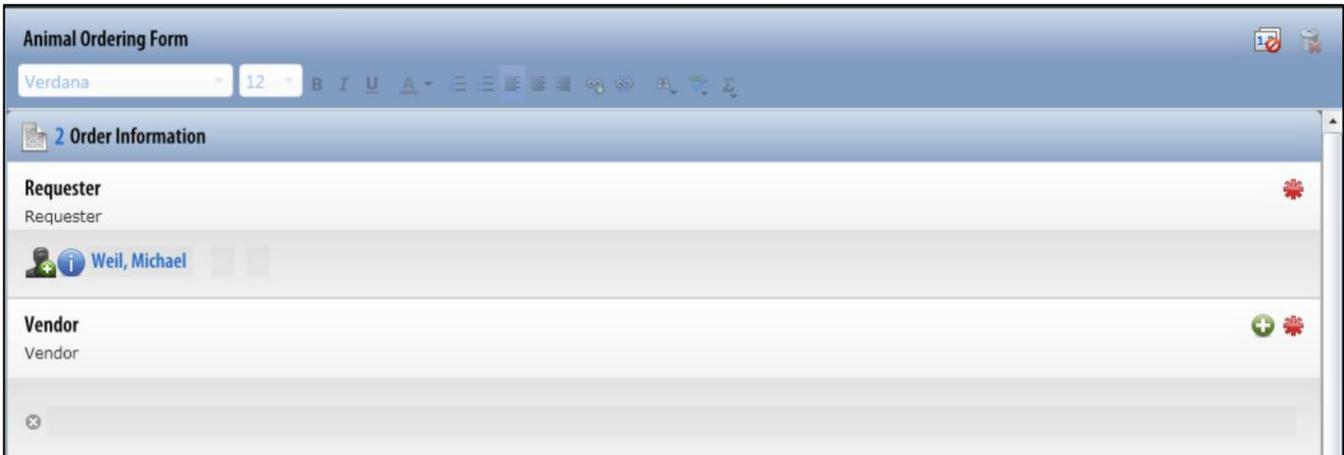


Step 5: Complete the questions in each section. Click on the **Next** button to advance to the next section.



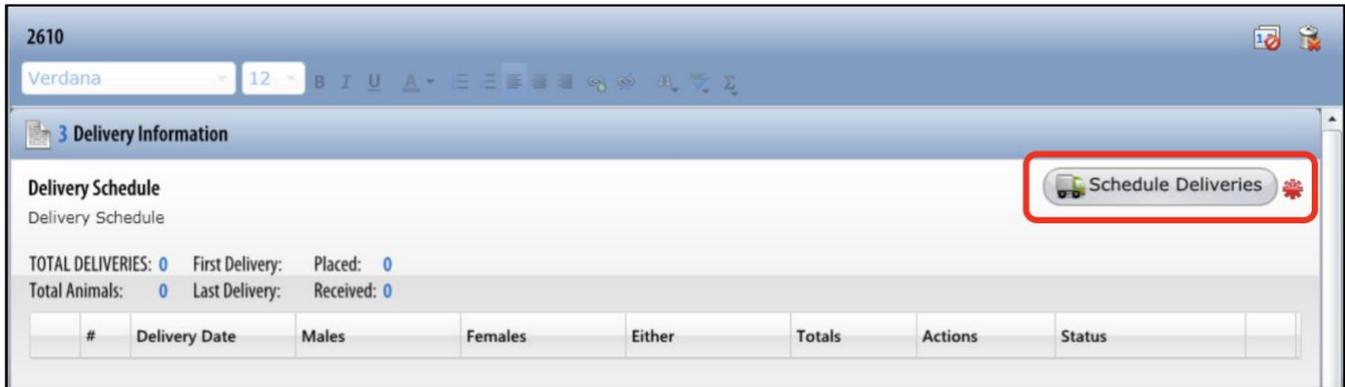
The screenshot shows the 'Animal Ordering Form' interface. The top navigation bar includes 'Animal Orders', 'Main', 'Forms', 'Orders', 'Reviews', 'Receipts', and 'Complaints'. The user is logged in as 'Weil, Michael'. The form is currently on 'Section 1 of 4'. The 'Protocol Information' section is active, showing a 'Request ID' of 2609. The 'Protocol and Species' section has a green plus icon next to it, which is highlighted by a red box and a callout box. The 'Principal Investigator' field is also visible. At the bottom right, the 'NEXT' button is highlighted with a red box.

- **Section 1: Protocol Information** – Under Protocol and Species click the  icon to select a protocol. A new Select Protocol/Species window will open. Select the desired protocol from the list. The window will close. Click the **Save** icon. **You must select a protocol and save for the remainder of the form to populate.** Click the **Next** button.
- **Section 2: Order Information** – Under Vendor click the  icon. A Select Vendor window will open. Click on the appropriate vendor. The window will close. Click the Next button.

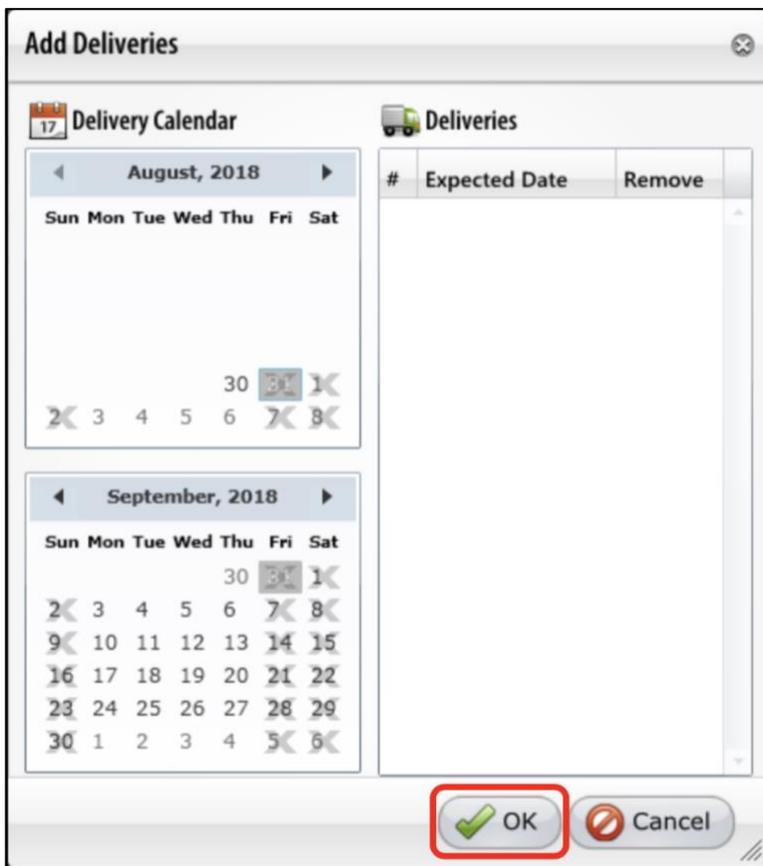


The screenshot shows the 'Animal Ordering Form' interface at 'Section 2 of 4'. The 'Order Information' section is active. The 'Requester' field is populated with 'Weil, Michael'. The 'Vendor' field is empty and has a green plus icon next to it, indicating it is ready to be selected. The 'NEXT' button is visible at the bottom right.

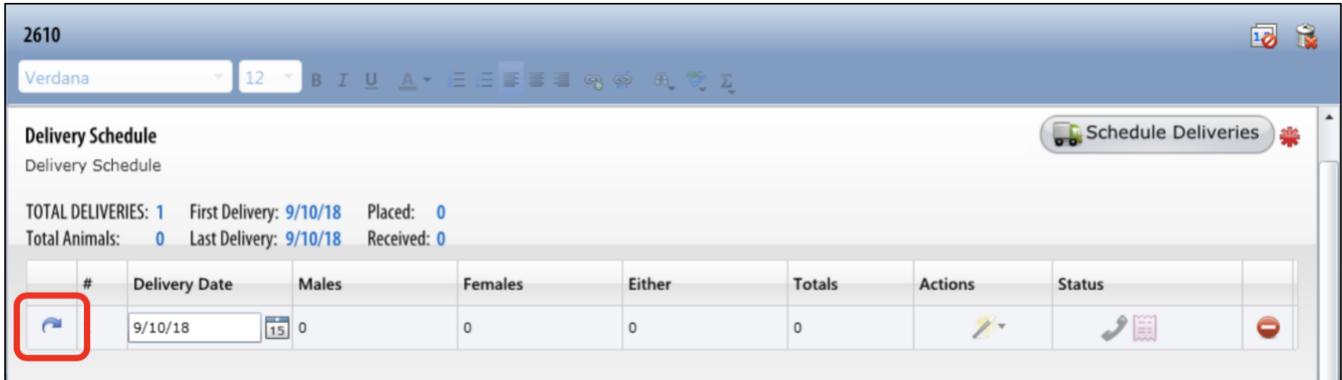
- **Section 3: Delivery Information** – In this section you will set the schedule for the animal delivery.
 - a. In the top right corner of the Delivery Schedule section, click the **Schedule Deliveries** button.



- b. A new Add Deliveries window will open. To select a date, click on the date in the calendar. Dates marked with an “x” are blackout dates upon which deliveries cannot be scheduled. You can schedule deliveries for a single date or multiple dates. For guidance for setting multiple dates, see [Recurring Order](#). When you have made your date selection, click the **OK** button.

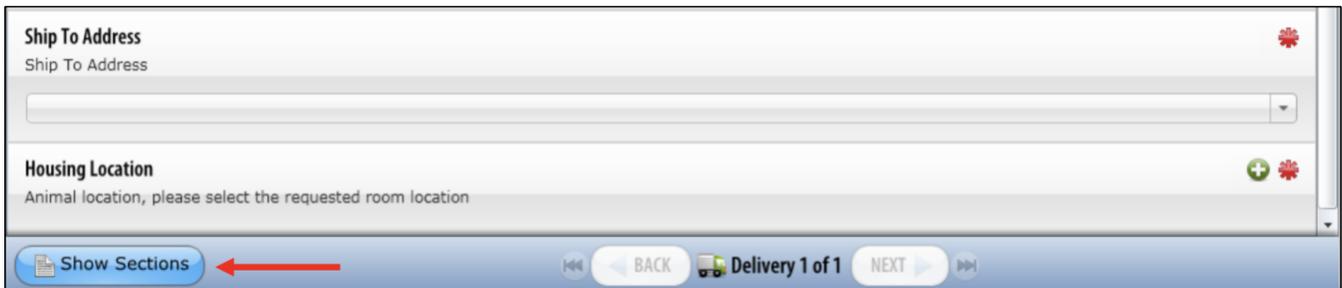


- c. The window will close and the new delivery date will be added to the Delivery Schedule. – Click the  icon (to the left of the Delivery Date) to edit the delivery details. The question section of the screen will refresh.



#	Delivery Date	Males	Females	Either	Totals	Actions	Status
	9/10/18	0	0	0	0		 

- d. The question section of the screen will refresh. Complete the questions using the + icon to open drop down menus. *Please note, all questions marked with a red * are required questions.* After entering the Strain/Stock/Breed, click the **Save** icon to populate the number of animals available. Enter the amount of animals you want to order. When finished, click the **Show Sections** button. Click the **Save** icon.



Ship To Address
Ship To Address

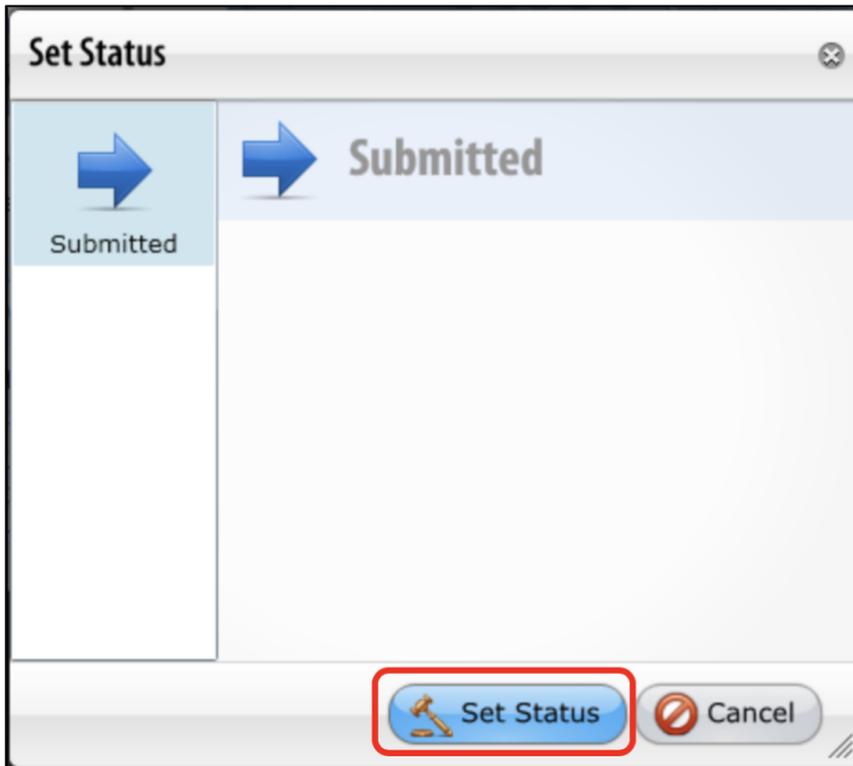
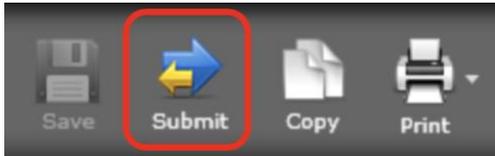
Housing Location
Animal location, please select the requested room location

Show Sections ←

BACK Delivery 1 of 1 NEXT

- e. The Delivery Schedule will update to include the new delivery details. – The remaining section, Section 4: Office Use Only, will be completed by the OAR office. You do not need to enter any information into this section.

Step 6: You have completed the order. Click the **Submit** button. A Set Status window will open. Click the **Set Status** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. Use the  button in the Outline to address any problem areas.]

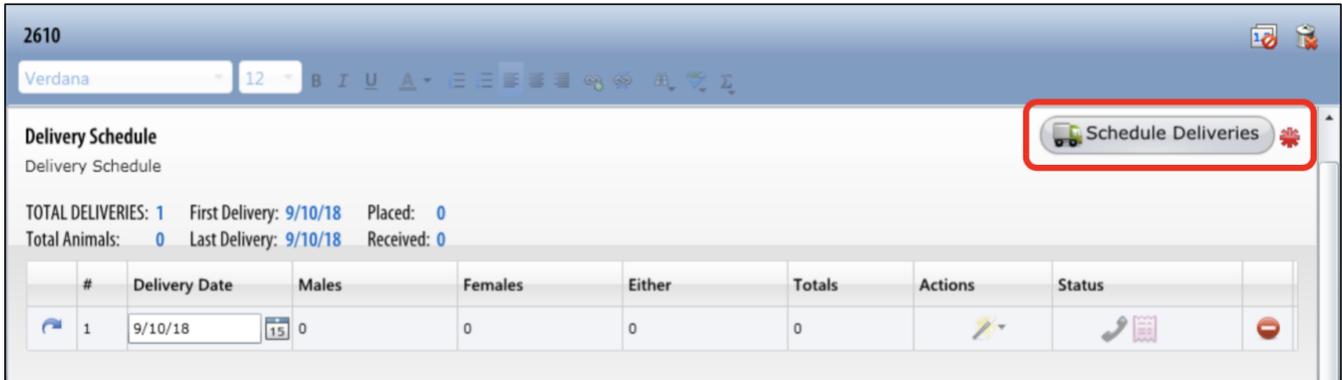


Step 7: When all errors are resolved, the *Set Status* window will close and an *E-signature Information* window will appear. Enter your **CU IdentiKey User Name** and **Password**, then click the **Save** button.

Recurring Orders

Delivery for a standing order is started the same way you would [create a one-time delivery](#). The major difference begins when you are on the *Schedule Deliveries* window of *Section 3: Delivery Information*.

Step 1: In the top right corner of the Delivery Schedule section, click on the **Schedule Deliveries** button. – A new *Add Deliveries* window will open.



2610

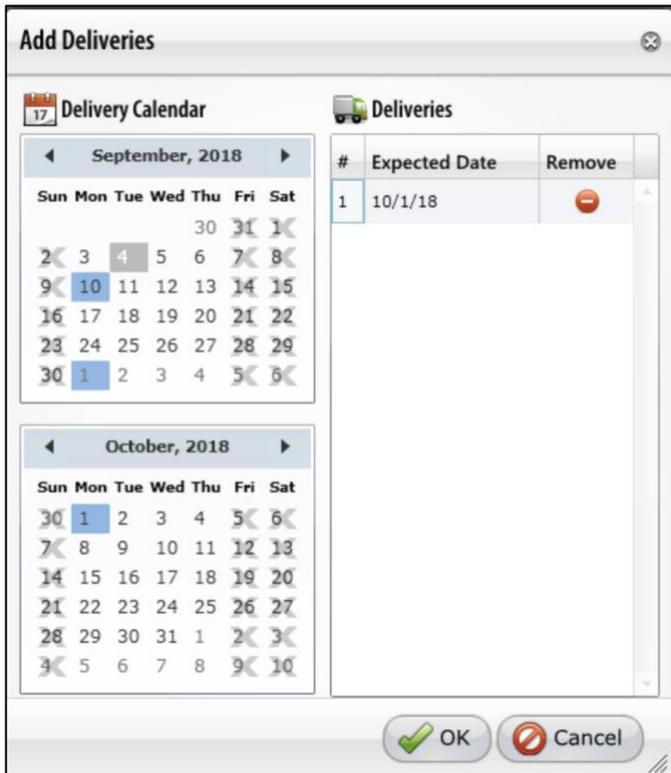
Verdana 12 B I U A [Rich Text Editor Icons]

Delivery Schedule
Delivery Schedule

TOTAL DELIVERIES: 1 First Delivery: 9/10/18 Placed: 0
Total Animals: 0 Last Delivery: 9/10/18 Received: 0

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	9/10/18	0	0	0	0	[Edit] [Phone] [Calendar]	[Remove]

Step 2: Click on the dates in the calendar on which you would like delivery. Dates marked with an “X” are blackout dates upon which deliveries cannot be scheduled. When you have made your date selections, click the **OK** button. – The window will close and the date will be added to the Delivery Schedule.



Add Deliveries

Delivery Calendar (September, 2018)

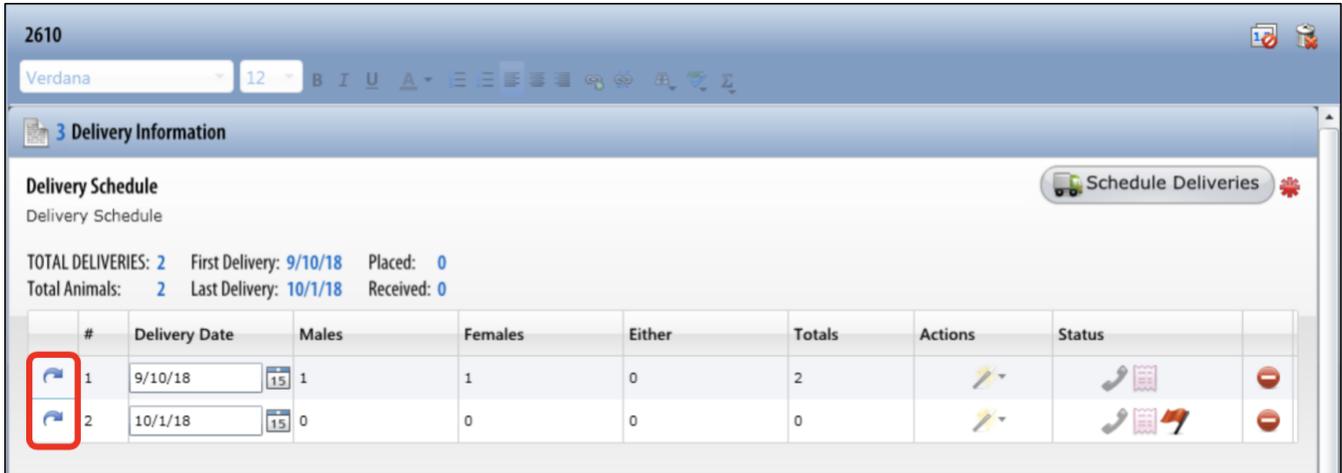
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Deliveries

#	Expected Date	Remove
1	10/1/18	[Remove]

OK Cancel

Step 3: Click the  icon to edit the first delivery details. The question section of the screen will refresh. Complete the questions and enter the amount of animals you want to order. When finished, click the **Show Sections** button. Click the **Save** icon.



2610

Verdana 12 B I U A [formatting icons]

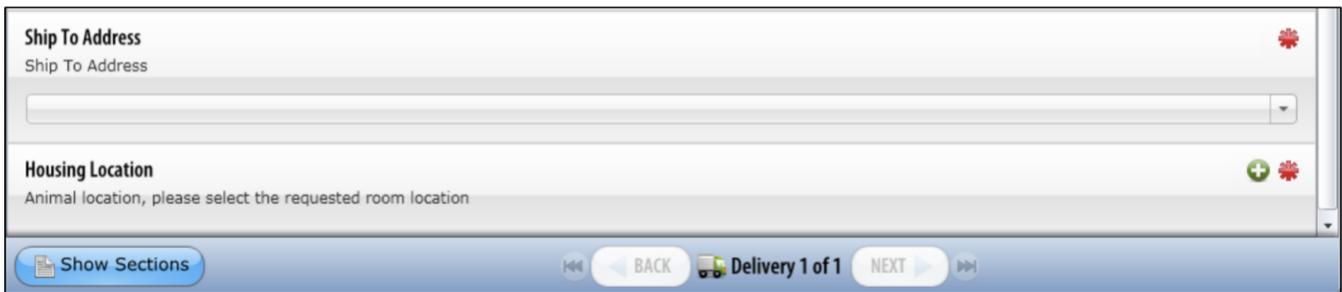
3 Delivery Information

Delivery Schedule Schedule Deliveries

Delivery Schedule

TOTAL DELIVERIES: 2 First Delivery: 9/10/18 Placed: 0
 Total Animals: 2 Last Delivery: 10/1/18 Received: 0

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	9/10/18	1	1	0	2	[edit icon]	[phone icon] [calendar icon]
2	10/1/18	0	0	0	0	[edit icon]	[phone icon] [calendar icon] [flag icon]



Ship To Address +

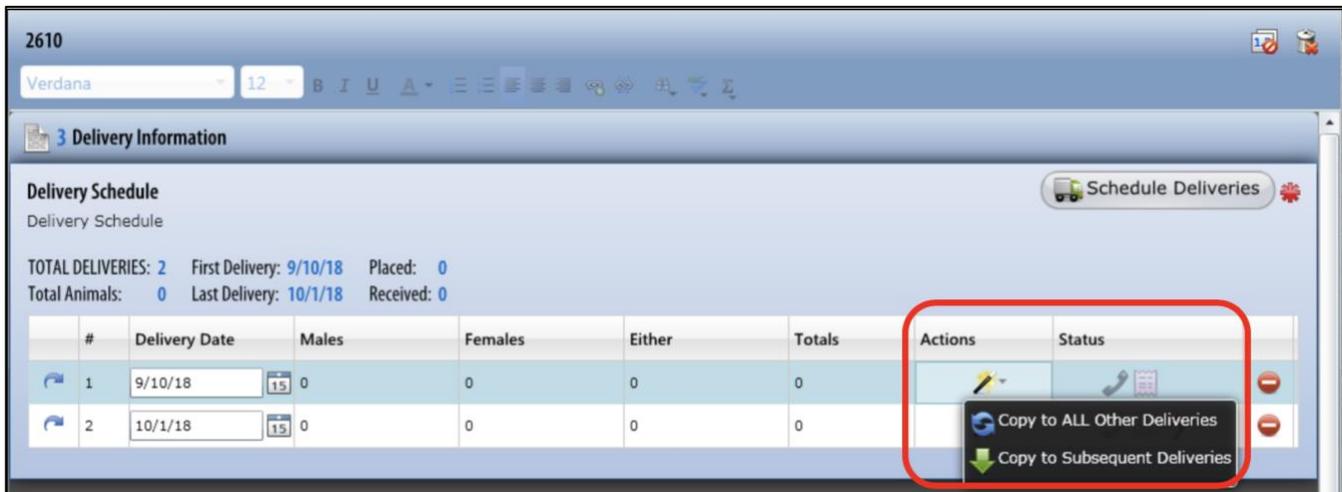
Ship To Address

Housing Location +

Animal location, please select the requested room location

Show Sections BACK Delivery 1 of 1 NEXT

Step 4: The Delivery Schedule will update to include the delivery you modified. If the delivery information is similar, you can easily copy first delivery details to the other deliveries using the *Actions* drop-down. Click the  icon. A menu will appear, select the **Copy to ALL Other Deliveries** to copy the information to all entries, or the **Copy to Subsequent Deliveries** to copy the information to all following the current delivery. If each delivery is different, use the  to edit each delivery. Click the **Save** icon when finished.



2610

Verdana 12 B I U A [formatting icons]

3 Delivery Information

Delivery Schedule Schedule Deliveries

Delivery Schedule

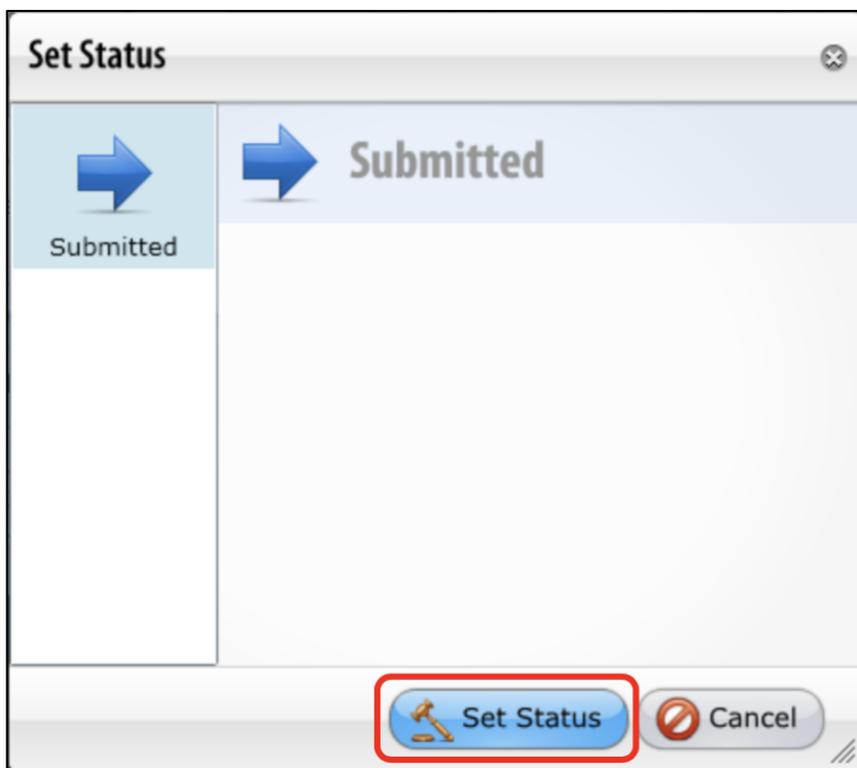
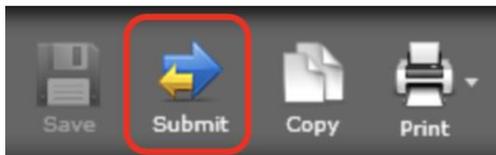
TOTAL DELIVERIES: 2 First Delivery: 9/10/18 Placed: 0
 Total Animals: 0 Last Delivery: 10/1/18 Received: 0

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	9/10/18	0	0	0	0	[edit icon]	[phone icon] [calendar icon]
2	10/1/18	0	0	0	0	[edit icon]	[phone icon] [calendar icon] [flag icon]

Copy to ALL Other Deliveries
 Copy to Subsequent Deliveries

Step 5: The remaining section, Section 4: Office Use Only, will be completed by the OAR office. You do not need to enter any information into this section.

Step 6: You have completed the order. Click the **Submit** button. A Set Status window will open. Click the **Set Status** button. The form will be checked for errors. If any required items have not been completed, you will not be able to save. Use the  button in the Outline to address any problem areas.



Step 7: When all errors are resolved, the *Set Status* window will close and an *E-signature Information* window will appear. Enter your **CU IdentiKey User Name** and **Password**, then click the **Save** button.

Animal Order Outline Filters

Use the Outline filters to easily view certain features in the form. When turned on, the filter will appear in color. The number below each filter indicates the number of questions associated with that filter. In the example below there are three required questions. When turned on the filters will display its respective question type. You may apply multiple filters at the same time.



Placed Deliveries 	This filter displays deliveries that have not been placed.
Received Deliveries 	This filter displays deliveries that have been received.
Different Deliveries 	This filter displays deliveries that are different from the others.
Required Questions 	This filter displays all questions that as marked as required.
E-Signature Questions 	This filter displays all questions that require an e-signature sign-off.
Unanswered Questions 	This filter displays all questions that were not answered by the author, PI, or other individual who submitted the protocol for review.

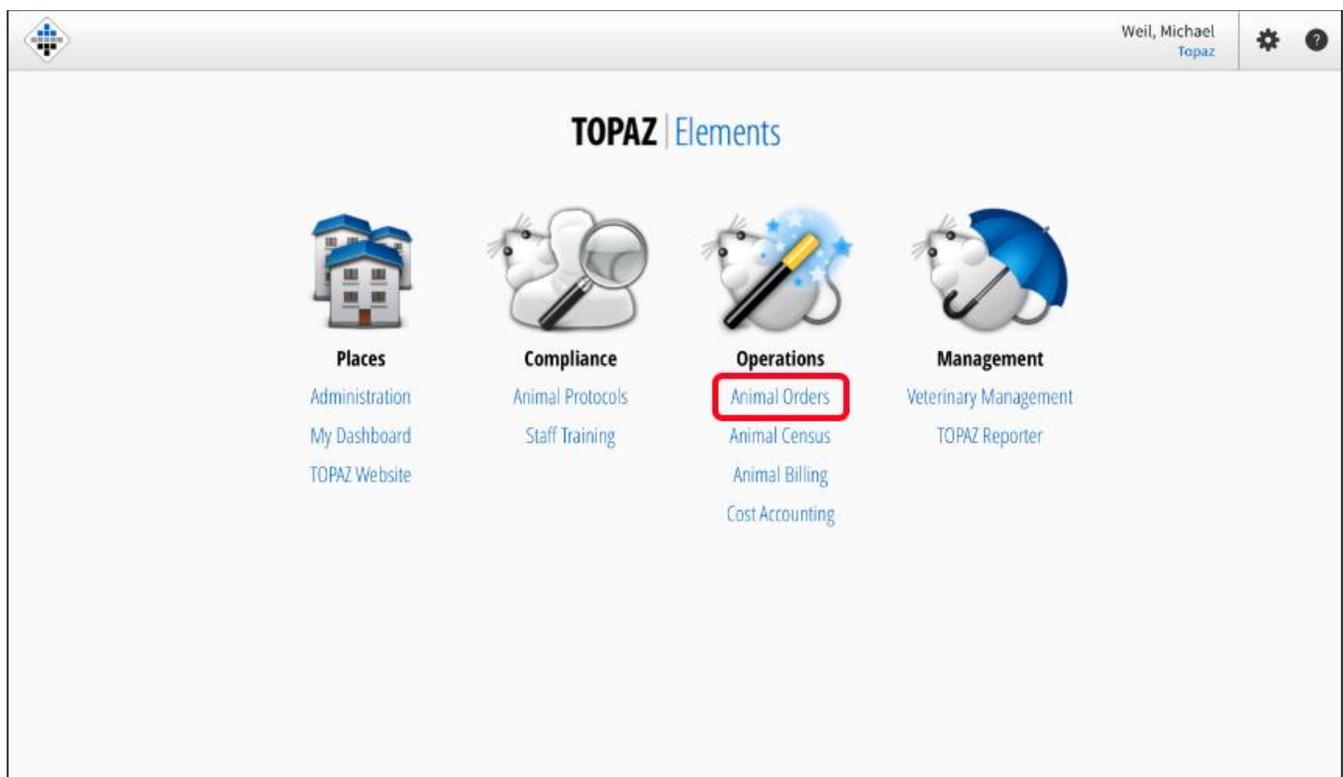
4. Order New Cage Cards For Weanings

Inform OAR staff of expected litters and request new cage cards. By completing this form, you are also reporting animal usage that will be deducted from your protocol.

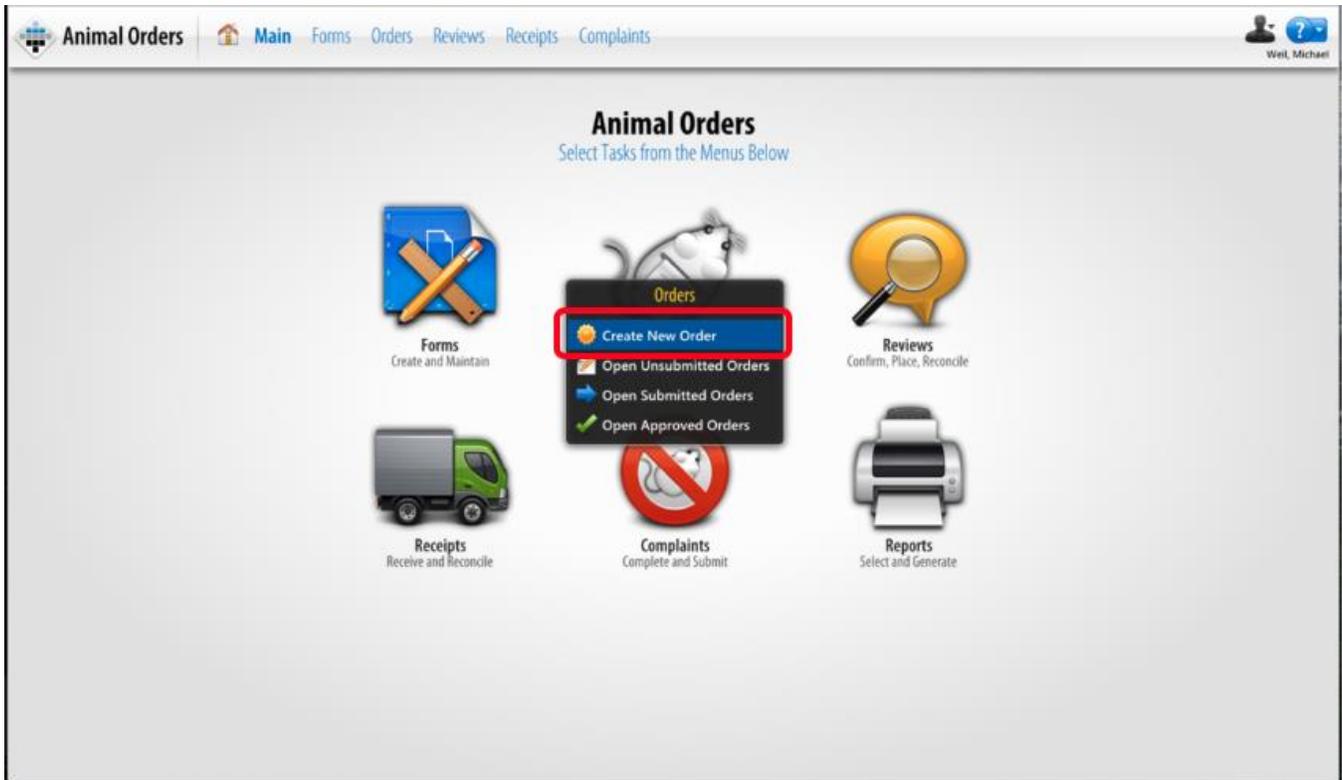
Step 1: Go to the Topaz login page at <https://animalprogram.colorado.edu>.

- For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- User experience is *greatly influenced* by the browser in use.
- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

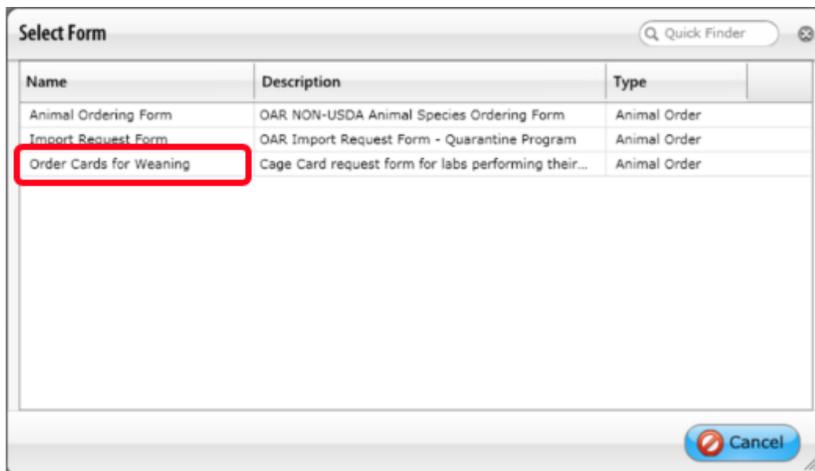
Step 2: Under *Operations* click on **Animal Orders**. [You may need to navigate to the *Topaz Elements* page.]



Step 3: Hover (with your cursor) over *Orders* and a menu will appear. Select **Create New Order** – The screen will refresh and a *Select Form* window is displayed.



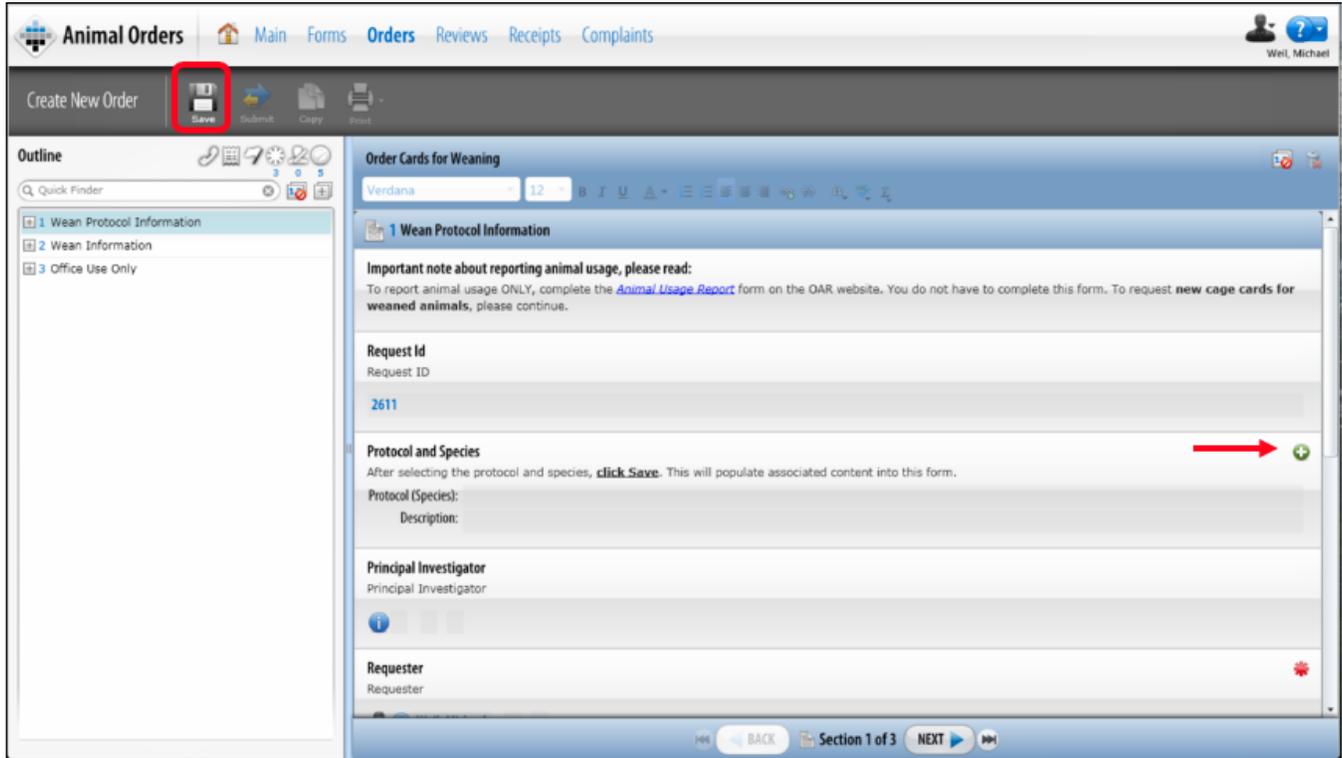
Step 4: Select **Order Cards for Weaning**. – The menu will close and the screen will display the animal order screen with an Outline of the sections and corresponding questions.



Complete Section 1: Wean Protocol Information

Step 1: Click the  button to open the *Protocol and Species* selection tool. Then select the associated protocol.

Step 2: Click **Save**.



Animal Orders | Main | Forms | **Orders** | Reviews | Receipts | Complaints

Create New Order | **Save** | Submit | Copy | Print

Outline

- 1 Wean Protocol Information
- 2 Wean Information
- 3 Office Use Only

Order Cards for Weaning

Verdana 12

1 Wean Protocol Information

Important note about reporting animal usage, please read:
To report animal usage ONLY, complete the [Animal Usage Report](#) form on the OAR website. You do not have to complete this form. To request **new cage cards for weaned animals**, please continue.

Request Id
Request ID
2611

Protocol and Species
After selecting the protocol and species, **click Save**. This will populate associated content into this form. 

Protocol (Species):
Description:

Principal Investigator
Principal Investigator

Requester
Requester

Section 1 of 3

Select Protocol/Species | Filter: Not Set...

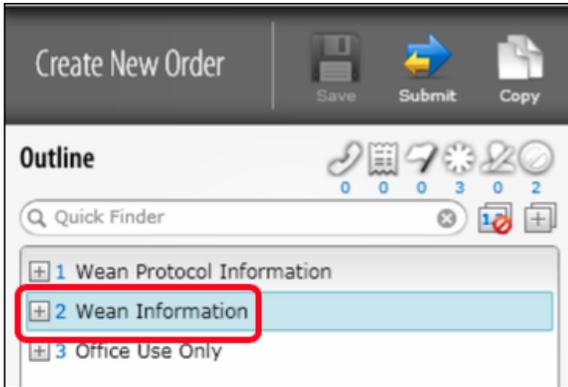
Protocol #	Version #	Protocol Title	Species	Species Descr	Principal Inve
2340-13NOV20	1	Cell-laden hydr	Mouse #1		Bryant, Stepha
2335-14DEC20	1	Biomarker-Resp	Mouse #1		Goodwin, Andre
1507.02-25SEP	2	The Role of Ooc	Rat #1		Antczak, Michae
1507.02-25SEP	2	The Role of Ooc	Mouse #1		Antczak, Michae
2494	1	Mechanically St	Mammals #1		Bryant, Stepha
2488	1	Nutritonal feedi	Birds #1		Newton, Peter
2510	1	Extreme Primat	Mammals #1		Sauther, Michel
2520	1	Genomic and bt	Birds #1		Taylor, Scott
2366-14DEC20	2	Pharmacokineti	Rat #1		Weiser, Michael

Page 1 of 1.
92 total record(s) found.

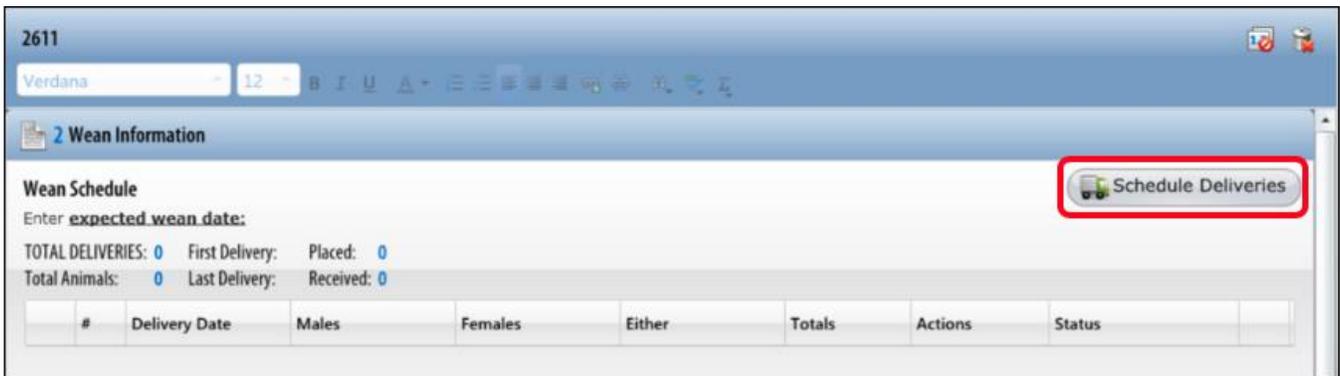
Cancel

Complete Section 2: Wean Information

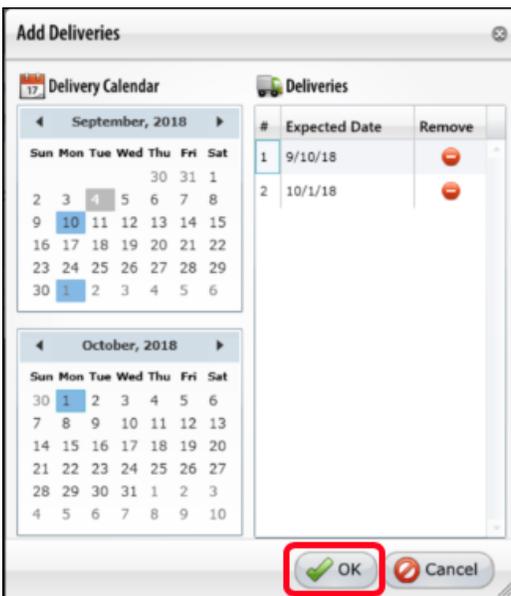
Step 1: Click **Wean Information** to open the next section of the form.



Step 2: Click **Scheduled Deliveries**.



Step 3: Set the date the litter will be weaned and placed in new cages. [If multiple litters are associated with this protocol, multiple dates can be selected.] – Click **OK** when finished.



Step 4: Open the Delivery subform by clicking on the  arrow next to each delivery date.

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Verdana 12 B I U A - [font icons]

Wean Schedule Schedule Deliveries

Enter **expected wean date:**

TOTAL DELIVERIES: 2 First Delivery: 9/10/18 Placed: 0
 Total Animals: 0 Last Delivery: 10/1/18 Received: 0

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	9/10/18 	0	0	0	0		 
2	10/1/18 	0	0	0	0		 

Step 5: Complete the **Delivery subform** and then click **Save**. (See the entire subform on the following page.)

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Verdana 12

Placed: Received

Delivery 2 - 10/1/2018

Emergency Phone
Please enter the after hours/cell phone of the emergency contact above.

Per Diem Account
Per Diem Account.

Strain/Stock/Breed
If your S/S/B is not listed here, please submit a request to add the strain to your protocol through the [Strain/Stock/Breed Request](#) form. (Click on the link to be directed to the webform.)

Birth Date
Birth Date (+/- 3 days)
<dd/yy> [13]

Animals per Pain Category
Animals per Pain Category
Current Totals (All Orders)
Requested: 0 On Order: 0 Received: 0 Adjustment: 0 Available: 1

Pain Category	# Males	# Females	# Either	Request...	On Order	Received	Adjustment	Authorized	Available	Percent Used
UBDA B	0	0	0	0	0	0	0	1	1	0.00

Housing Location
Animal location, please select the requested room location.

Cage Type
Please one from the drop down menu.

Number of New Cage Cards Needed
Enter the number of new cages that need to be created.

Number Per Cage
Number of animals per cage
Males: 0 Females: 0

Cage Card Comments
Please enter any information you would need to appear on the cage card.

Communication to OAR Staff
If you have any special instructions for the OAR Staff regarding this wear, please enter it below.

Cage Card Handling
To pick up and place cage cards yourself, leave blank.
If you would like OAR staff to place the cage card(s), enter the word "Place" in the box below and flag the cages with temporary cage cards. (Please make sure the Temporary Cage Card is fully completed and visible).

Parent Cage Number
Provide the cage card number of the parent cage.

If your S/S/B is not listed, click here to add the strain.

Enter the date the litter was born.

Enter the maximum number of animals allowed per cage. (i.e. 5 mice per mouse sterile cage)

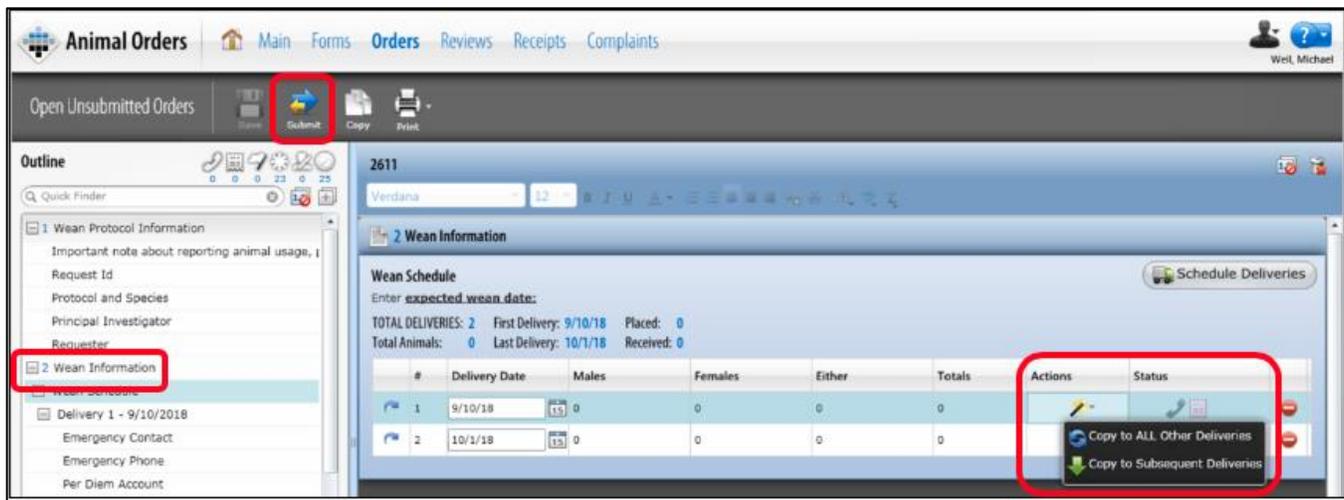
Schedule Multiples Deliveries

Step 1: Navigate to **Wean Information** and schedule additional deliveries as needed.

Step 2: If you would like to copy details from the subform you just completed (e.g. contact info, per diem account), open the *Actions* dropdown and selecting **Copy to ALL** or **Subsequent Deliveries**.

Step 3: Open the subsequent delivery forms and **make changes specific to that weaning request** – animal numbers, strain, birthdate, etc.

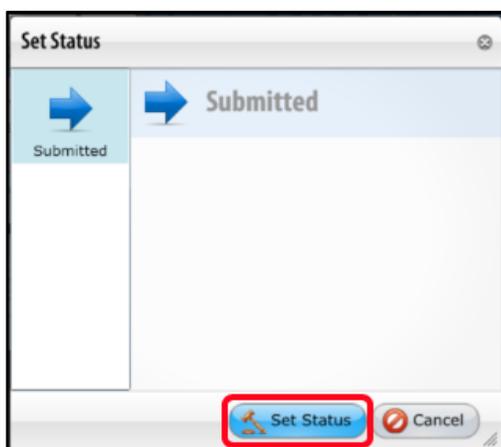
Step 4: Click **Submit**.



The screenshot shows the 'Animal Orders' software interface. The 'Wean Information' subform is active, displaying a 'Wean Schedule' table with two delivery dates: 9/10/18 and 10/1/18. The 'Submit' button is highlighted in red. The 'Actions' column for the second delivery is highlighted in red, showing options for 'Copy to ALL Other Deliveries' and 'Copy to Subsequent Deliveries'.

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	9/10/18	0	0	0	0		
2	10/1/18	0	0	0	0	<ul style="list-style-type: none"> Copy to ALL Other Deliveries Copy to Subsequent Deliveries 	

Step 5: In the pop-up window, click **Set Status**.



The 'Set Status' pop-up window shows a list of status options. The 'Submitted' status is selected, and the 'Set Status' button is highlighted in red.

Step 6: When all errors are resolved, the *Set Status* window will close and an *E-signature Information* window will appear. Enter your **CU IdentiKey User Name** and **Password**, then click the **Save** button.

- Make note of the **Item Name** (aka the Request ID) for your records.