



USER GUIDE: PI & ASSOCIATES

Updated: 10/04/2017

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LAB/CLASSROOM 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).

1. **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.

2. **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.

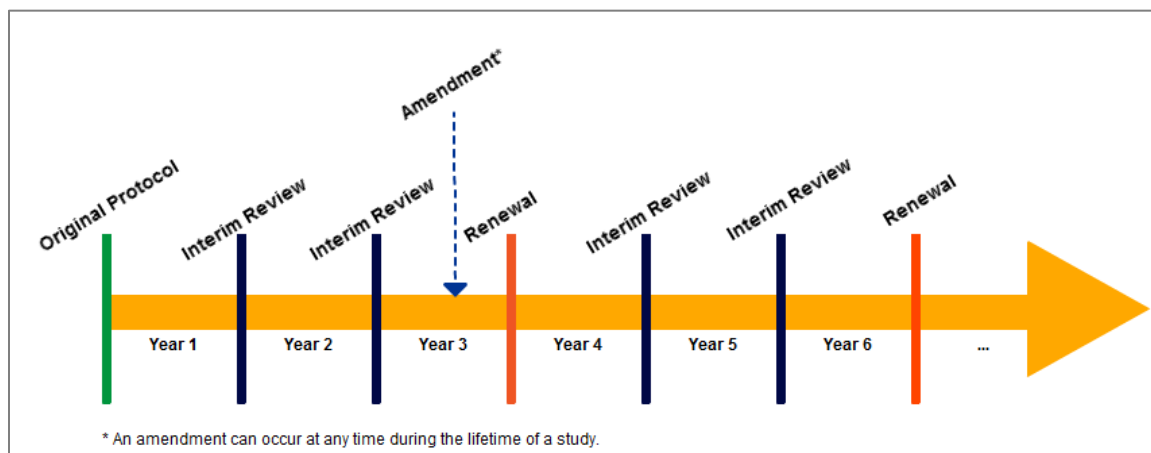
Submission Interval: Annually for the two years following initial approval or renewal.

3. **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.

4. **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.

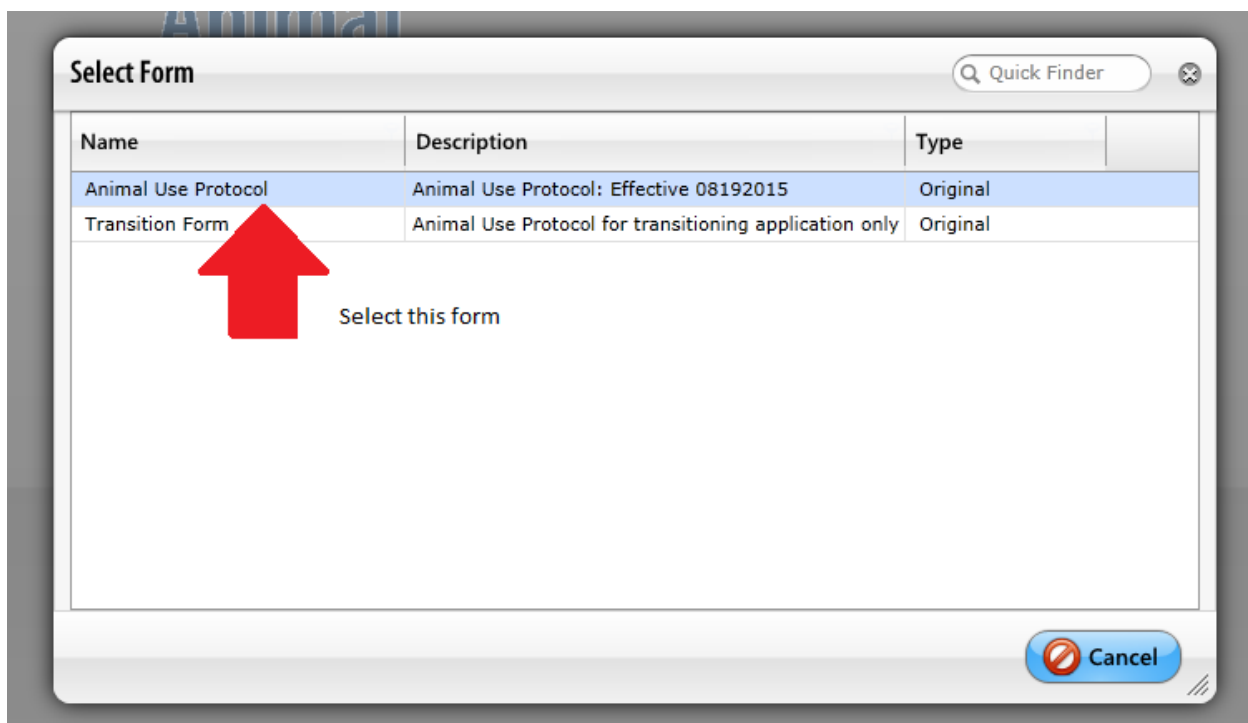


1 THE SUBMISSION LIFECYCLE OF A STUDY.

New

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

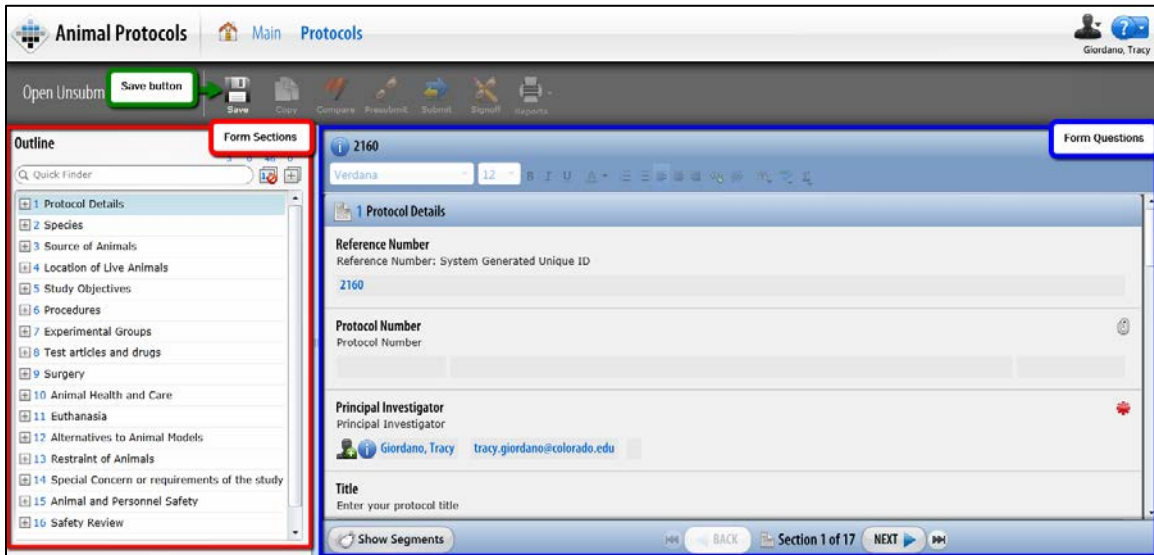
1. Go to the Topaz login page at <https://animalprogram.colorado.edu>
 - Bookmark this page for easy access later.
 - Login with your CU IdentiKey and password.
2. Open **Animal Protocols**.
3. Hover (with your cursor) over **Protocols** and a menu will appear. Select **Create Original Protocol**.
4. The screen will refresh. In the *Select Form* window, select **Lab/Classroom Use Protocol - NEW**.



2 AN EXAMPLE OF THE SELECT FORM WINDOW.

Navigating the Form





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



3 AN EXAMPLE PROTOCOL SCREEN.

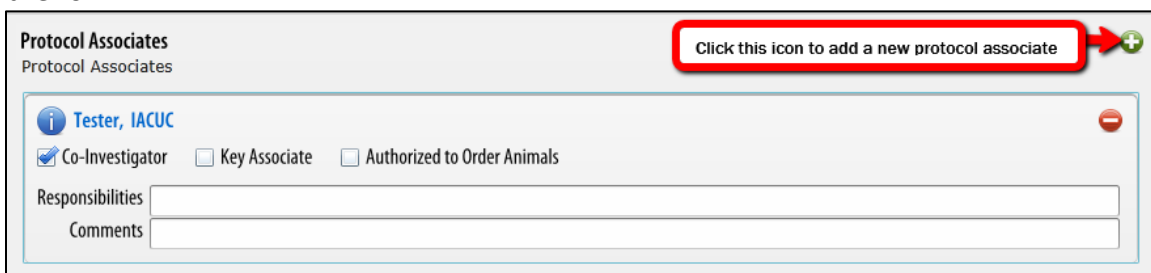
2. Complete the questions in each section. Some sections will include segments that must be completed. When finished, click on the **Next** button to advance to the next section.

Icons You Will See

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

Completing the Protocol

1. **Section 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.



4 EXAMPLE OF PROTOCOL ASSOCIATES SUBSECTION.

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 able to view the approved protocol only.

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 literally cannot pick experimental Pain Category B for those 100.

Scenario 1: Only experience category B

Scenario 2: Only experience category C

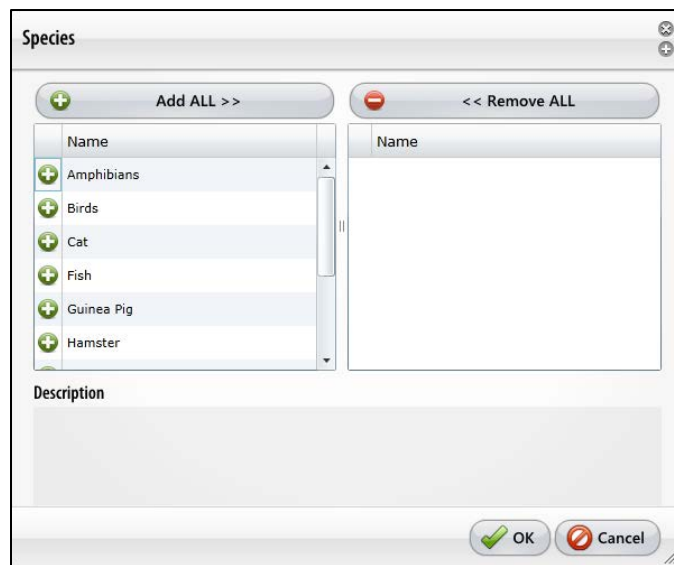
Scenario 3: Will Experience B then C

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.

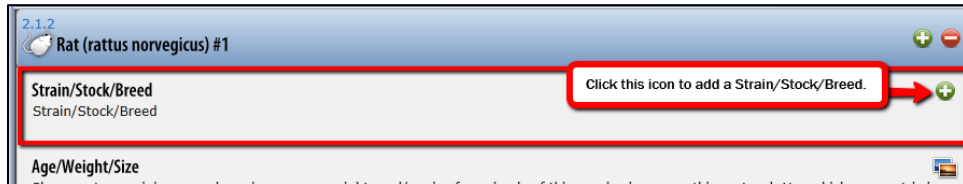


5 EXAMPLE OF SPECIES SELECTION WINDOW.



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.

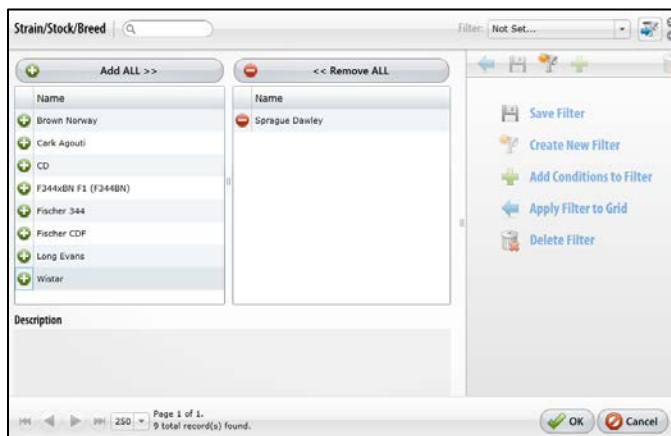
a. Strain/Stock Breed

- i. For each species you must select a Strain/Stock/Breed. The Strain/Stock/Breed subsection is the first question of the segment.



6 EXAMPLE OF HOW TO ADD STRAIN/STOCK/BREED FOR RAT.

- 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.



7 EXAMPLE OF THE STRAIN/STOCK/BREED SELECTION WINDOW.

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


2. **Section 4: Animal Use** – Enter the Abstract, any agents, breeding and more. Click the **Save** button. Click the **Next** button.
3. **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.
4. **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.
5. **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.
6. **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.

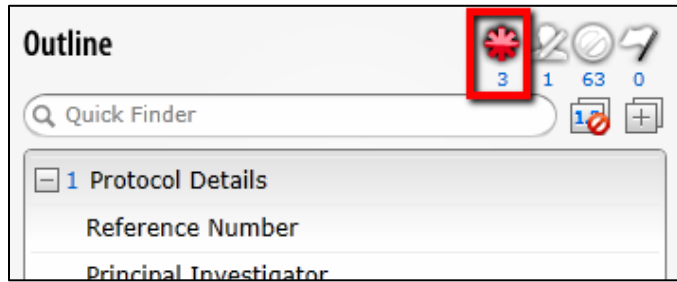
Click the **Save** button. Click the **Next** button.

7. **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.

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

9. 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. Use the  button in the Outline to address any problem areas.



8 EXAMPLE OF THE OUTLINE WITH THREE OUTSTANDING REQUIRED QUESTIONS THAT NEED TO BE ADDRESSED BEFORE SUBMITTING.

10. all errors are resolved an e-signature window will appear. Enter your CU IdentiKey and password, then click the **Save** button.

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.

1. Go to the Topaz login page at <https://animalprogram.colorado.edu>
 - Bookmark this page for easy access later.
 - Login with your CU IdentiKey and password.
2. Open **Animal Protocols**.
3. Hover 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.**
4. Select the desired protocol and click the **Ok** button.
 - The window will close and a *Select Form for Interim Review* window will appear.
5. Select **Lab/Classroom Use Protocol – ANNUAL/INTERIM REVIEW**. (If this applies to a Transition protocol, the form will be called *Transition Protocol – ANNUAL/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 Question*.

The screenshot shows the 'Animal Protocols' software interface. At the top, there is a navigation menu with 'Animal Protocols', 'Main', 'Forms', 'Protocols', 'Reviews', and 'Meetings'. Below the menu is a toolbar with icons for 'Save', 'Copy', 'Compare', 'Resubmit', 'Submit', 'Signoff', and 'Reports'. The main content area is divided into an 'Outline' on the left and a 'Form' on the right. The 'Outline' lists sections 1 through 12, with '11 Annual Review Questions' highlighted in red. The 'Form' displays the '11 Annual Review Questions' section, which includes a 'Protocol status' question with radio buttons for 'No, close it.' and 'Yes, leave it open.', a 'Problems/Adverse Effects' section with a text area, and a 'Changes made to this protocol in the past year' section with a text area. The bottom of the form has navigation buttons for 'Show Segments', 'BACK', 'Section 11 of 12', and 'NEXT'.

AN EXAMPLE PROTOCOL SCREEN FOR AN INTERIM REVIEW.


Icons You Will See

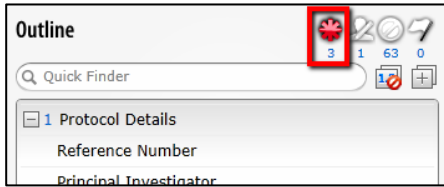
-  The **Required** icon indicates that the question you are on must be completed in order to submit the form.
-  The **Attachment** icon indicates a question that you can upload an attachment.
-  The **Add** icon indicates an element that you can add additional information.
-  The **Add Image** icon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

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

- *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. **1.1 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. **1.2 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. **1.3 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. **1.4 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. **1.5 Animals:** Confirm if you have enough animals for the research you are planning in the coming year.

7. You have completed the interim review application. Click the **Submit** button.

- 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.



EXAMPLE OF THE OUTLINE WITH THREE OUTSTANDING REQUIRED QUESTIONS THAT NEED TO BE ADDRESSED BEFORE SUBMITTING.

8. When all errors are resolved an e-signature window will appear. Enter your CU IdentiKey and password, then click the **Save** button.

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.

1. Go to the Topaz login page at <https://animalprogram.colorado.edu>
 - Bookmark this page for easy access later.
 - Login with your CU IdentiKey and password.
2. Open **Animal Protocols**.
3. Hover your cursor over **Protocols**. A menu will appear. Select **Create Amendment Protocol**.
 - The screen will refresh and display the *Select Protocol For Amendment* window with a list of your protocols that are eligible to amend.
 - *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.*
4. Select the desired protocol and click the **Ok** button.
 - The window will close and a *Select Form for Amendment* window will appear.
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 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*.

The screenshot displays the 'Animal Protocols' web application interface. At the top, there is a navigation bar with 'Main', 'Protocols', 'Reviews', and 'Meetings'. A user profile for 'Giordano, Tracy' is visible in the top right. Below the navigation bar, there is a toolbar with various icons and a 'Save button' highlighted with a green box. The main content area is divided into two sections. On the left, there is an 'Outline' panel with a search bar and a list of sections. The first section, '1 Amendment', is highlighted in yellow, and a yellow box with an arrow points to it with the text 'New amendment section'. On the right, the 'Form Sections' panel is active, showing a text area for 'List the proposed changes made in this protocol' and a question about 'More clinical illness, pain, or distress or other health issues' with radio buttons for 'Yes' and 'No'. The 'Yes' option is selected. At the bottom, there are navigation controls for 'Section 1 of 19'.

AN EXAMPLE PROTOCOL SCREEN FOR AN AMENDMENT.

Icons You Will See


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

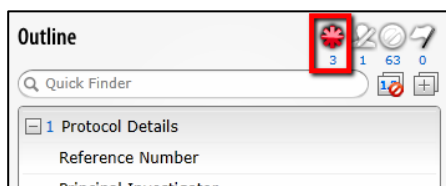
6. Complete the questions in **Section 1: Amendment**.

- *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.)*
- **1.1 List the proposed changes to this 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.
- **1.2 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, adds a new pain Category D or E you must conduct a new literature search for the new procedure. Report the databases used in literature search in
- **11.3 Other concerns**
- **11.4 Potentially adverse events**

7. Update the remaining protocol sections as needed.

8. You have completed the renewal application. Click the **Submit** button.

- 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.



EXAMPLE OF THE OUTLINE WITH THREE OUTSTANDING REQUIRED QUESTIONS THAT NEED TO BE ADDRESSED BEFORE SUBMITTING.

9. When all errors are resolved an e-signature window will appear. Enter your CU IdentiKey and password, then click the **Save** button.

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.

1. Go to the Topaz login page at <https://animalprogram.colorado.edu>
 - Bookmark this page for easy access later.
 - Login with your CU IdentiKey and password.
2. Open **Animal Protocols**.
3. Hover your cursor over **Protocols**. A menu will appear. Select **Create Renewal Protocol**.
 - The screen will refresh and display the *Select Protocol For Renewal* window with a list of your protocols that are eligible to amend.
 - *Troubleshooting tip: If your protocol does not display, it is likely that a review, renewal, 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 one.*
4. Select the desired protocol and click the **Ok** button.
 - The window will close and a *Select Form 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](#).)*
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*.

The screenshot displays the 'Animal Protocols' web application. At the top, there is a navigation menu with 'Main', 'Forms', 'Protocols', 'Reviews', and 'Meetings'. The user is logged in as 'DuHadway, Carina'. The main area is titled 'Create Renewal Protocol' and features a toolbar with icons for Save, Copy, Compare, Presubmit, Submit, Signoff, and Reports. On the left, an 'Outline' panel shows a list of sections: 1 Protocol Details, 2 Personnel, 3 Species, 4 Animal Use, 5 Animal: Number Justification, Sources, & Location, 6 Justification of Animal Use, 7 Pain and Distress, 8 Animal Care, 9 Animal and Personnel Safety, 10 Principal Investigator Certification, 11 Renewal (highlighted in red), and 12 Office Use Only. The main content area shows the '11 Renewal' section. It includes a 'Protocol status' question: 'Do you want to keep this animal protocol open and active?' with radio buttons for 'No, close it' and 'Yes, leave it open'. Below this is a 'Problems/Adverse Effects' section with a text input field. The bottom of the screen has a navigation bar with 'Show Segments', 'BACK', 'Section 11 of 12', 'NEXT', and a refresh icon.

AN EXAMPLE PROTOCOL SCREEN FOR A RENEWAL.

Icons You Will See


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

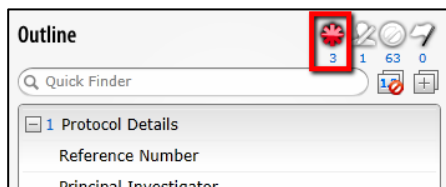
6. Complete the questions in **Section 11: Renewal**.

- *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.)*
- **11.1 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.

7. Update the remaining protocol sections as needed.

8. You have completed the renewal application. Click the **Submit** button.

- 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.



EXAMPLE OF THE OUTLINE WITH THREE OUTSTANDING REQUIRED QUESTIONS THAT NEED TO BE ADDRESSED BEFORE SUBMITTING.

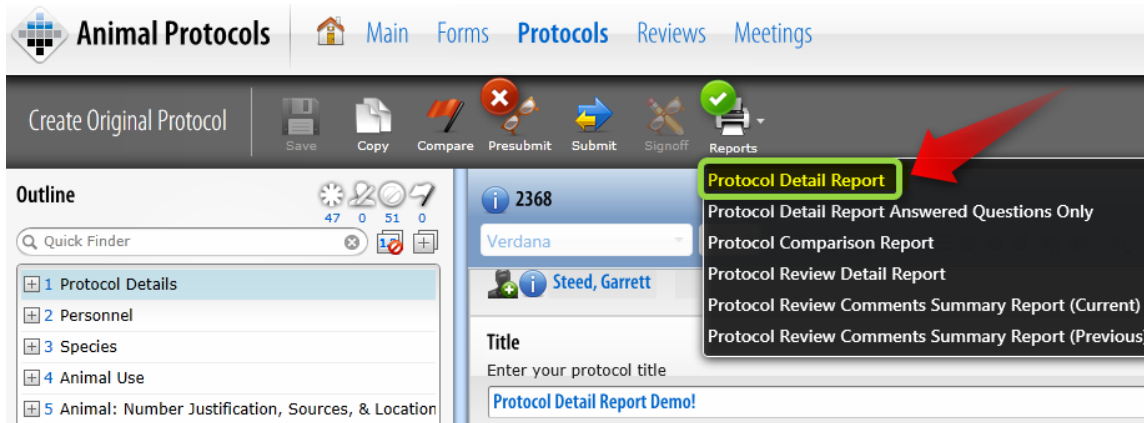
9. When all errors are resolved an e-signature window will appear. Enter your CU IdentiKey and password, then click the **Save** button.

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)

- 1) Click on **Reports** and select **Protocol Detail Report**. Do not select **Presubmit**.

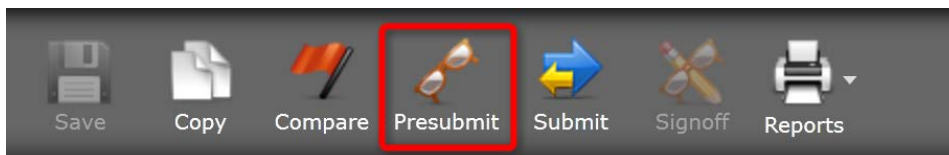


- 2) Download the report to your local hard drive. (The file will be in a PDF format. We recommend using Adobe's comment tool.)

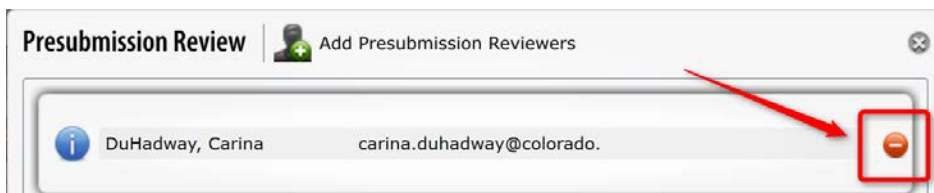


Remove Pre-Submission Reviewer (if added previously)

- 1) Click on **Presubmit**.



- 2) Click on the remove icon.



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

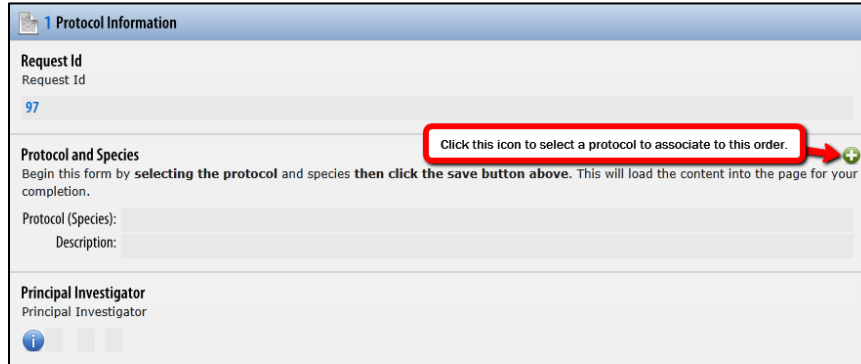
1. Open a Silverlight-enabled browser.
 - PC users: Internet Explorer.
 - Mac users: Safari.
2. Go to the Topaz login page at <https://animalprogram.colorado.edu>
 - Bookmark this page for easy access later.
3. Login with your CU IdentiKey and password.
4. Under **Operations**, click on **Animal Orders**. The screen will refresh.
5. Hover your cursor over **Orders**. A menu will appear. Select **Create New Order**. The screen will refresh and a Select Form window will be displayed.
6. Select **Animal Ordering Form** (the most commonly used form) if ordering from a commercial vendor. If acquiring animals for another source such as another university, select the **Import Request Form**.
 - The menu will close and the screen will display the animal order screen with an Outline of the sections and corresponding questions.

The screenshot displays the 'Animal Ordering Form' interface. At the top, there is a navigation bar with 'Animal Orders', 'Main', 'Orders', 'Reviews', and 'Receipts'. A user profile for 'Giordano, Tracy' is visible in the top right. Below the navigation bar, there is a toolbar with a 'Save button' highlighted by a green box and an arrow, along with 'Save', 'Submit', 'Copy', and 'Print' icons. The main content area is titled 'Animal Ordering Form' and contains several sections: '1 Protocol Information' (with a 'Form Questions' button), 'Request Id' (with the value '95'), 'Protocol and Species' (with instructions to select protocol and species and click the save button), and 'Principal Investigator'. A sidebar on the left, titled 'Form Sections', lists '1 Protocol Information', '2 Order Information', '3 Delivery Information', and '4 Office Use Only'. The bottom navigation bar shows 'Section 1 of 4' and 'NEXT' buttons.

9 AN EXAMPLE ANIMAL ORDER SCREEN.

7. Complete the questions in each section. Click on the **Next** button to advance to the next section.

- **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.



1 Protocol Information


Request Id
Request Id
97

Protocol and Species
Begin this form by selecting the protocol and species then click the save button above. This will load the content into the page for your completion.

Protocol (Species):
Description:

Principal Investigator
Principal Investigator

10 EXAMPLE OF THE ADD BUTTON ON THE PROTOCOL INFORMATION SECTION.

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



3 Delivery Information

Delivery Schedule
Delivery Schedule

TOTAL DELIVERIES: 0 First Delivery: Placed: 0
Total Animals: 0 Last Delivery: Received: 0

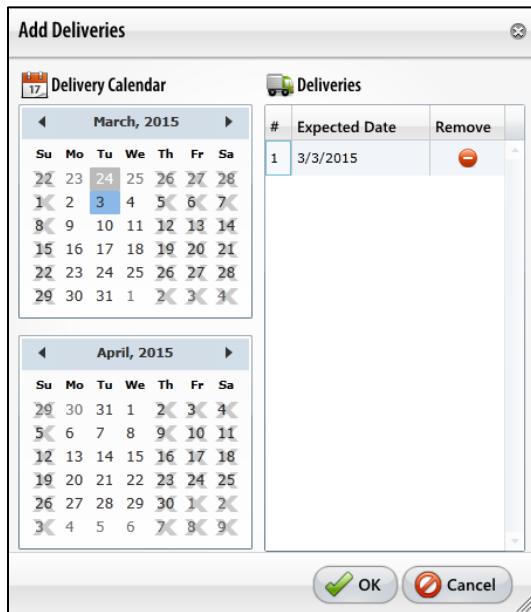
#	Delivery Date	Males	Females	Either	Totals	Actions	Status
---	---------------	-------	---------	--------	--------	---------	--------

Click this button to open the Add Deliveries window.

Schedule Deliveries

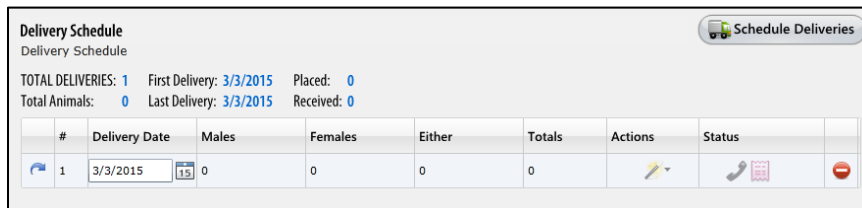
11 THE SCHEDULE DELIVERY BUTTON IS LOCATED ON THE RIGHT SIDE OF THE DELIVERY SCHEDULE. USE THIS BUTTON TO SCHEDULE A NEW DELIVERY.

- ii. 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 [Standing Order](#). When you have made your date selection, click the **Ok** button.




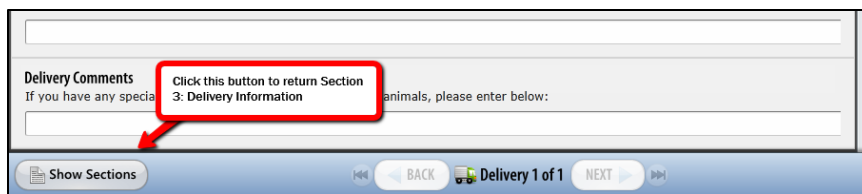
12 EXAMPLE ADD DELIVERIES WINDOW WITH A SINGLE DATE SELECTED.

- iii. The window will close and the new delivery date will be added to the Delivery Schedule.



13 AN EXAMPLE THE DELIVERY SCHEDULE FOR A ONE-TIME DELIVERY.

- iv. Click the  icon (to the left of the delivery date) to edit the delivery details. The question section of the screen will refresh. Complete the 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.



14 AN EXAMPLE OF THE SHOW SECTIONS BUTTON THAT IS USED TO RETURN TO THE DELIVERY SCHEDULE.

- The Delivery Schedule will update to include the new delivery details.

3 Delivery Information


Delivery Schedule
Delivery Schedule

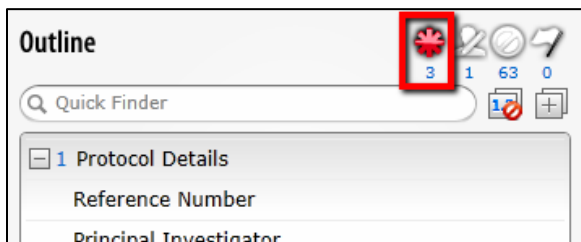
Schedule Deliveries

TOTAL DELIVERIES: 1 First Delivery: 3/3/2015 Placed: 0
Total Animals: 10 Last Delivery: 3/3/2015 Received: 0

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	3/3/2015	5	5	0	10		

15 AN EXAMPLE OF THE DELIVERY SCHEDULE FOR A COMPLETED ONE-TIME DELIVERY.

- 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.
8. 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.



16 EXAMPLE OF THE OUTLINE WITH THREE OUTSTANDING REQUIRED QUESTIONS THAT NEED TO BE ADDRESSED BEFORE SUBMITTING.

9. When all errors are resolved, the Set Status window will close and an e-signature window will appear. Enter your CU IdentiKey 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.

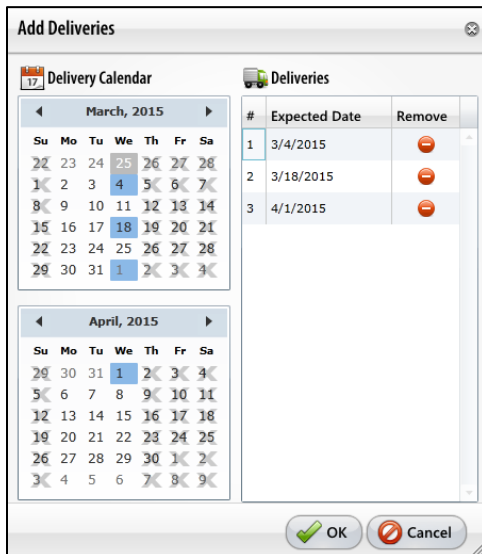
1. In the top right corner of the Delivery Schedule section, click on the **Schedule Deliveries** button.



17 THE SCHEDULE DELIVERY BUTTON IS LOCATED ON THE RIGHT SIDE OF THE DELIVERY SCHEDULE. USE THIS BUTTON TO SCHEDULE THE DELIVERIES.

A new Add Deliveries window will open.

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.



18 EXAMPLE ADD DELIVERIES WINDOW WITH MULTIPLE DATES SELECTED.

The window will close and the dates will be added to the Delivery Schedule.

3 Delivery Information

Delivery Schedule
Delivery Schedule

TOTAL DELIVERIES: 3 First Delivery: 3/4/2015 Placed: 0
Total Animals: 0 Last Delivery: 4/1/2015 Received: 0

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	3/4/2015	0	0	0	0	[Edit]	[Phone] [Calendar] [Close]
2	3/18/2015	0	0	0	0	[Edit]	[Phone] [Calendar] [Close]
3	4/1/2015	0	0	0	0	[Edit]	[Phone] [Calendar] [Close]

19 AN EXAMPLE THE DELIVERY SCHEDULE FOR A STANDING ORDER.

- Click the [Edit] 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.

Delivery Comments
If you have any special requirements for these animals, please enter below:

Click this button to return Section 3: Delivery Information

Show Sections BACK Delivery 1 of 1 NEXT

20 AN EXAMPLE OF THE SHOW SECTIONS BUTTON THAT IS USED TO RETURN TO THE DELIVERY SCHEDULE.


- 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 menu. Click the [Edit] 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 [Edit] to edit each delivery. Click the **Save** icon when finished.

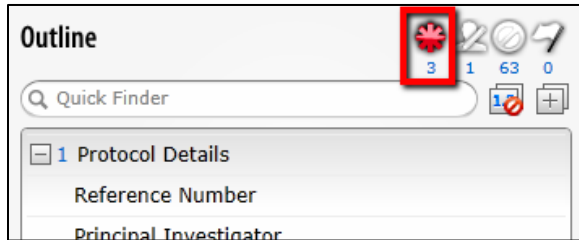
Delivery Schedule
Delivery Schedule

TOTAL DELIVERIES: 3 First Delivery: 3/4/2015 Placed: 0
Total Animals: 0 Last Delivery: 4/1/2015 Received: 0

#	Delivery Date	Males	Females	Either	Totals	Actions	Status
1	3/4/2015	5	5	0	10	[Edit] [Copy to ALL Other Deliveries] [Copy to Subsequent Deliveries]	[Phone] [Calendar] [Close]
2	3/18/2015	0	0	0	0	[Edit]	[Phone] [Calendar] [Close]
3	4/1/2015	0	0	0	0	[Edit]	[Phone] [Calendar] [Close]

21 AN EXAMPLE OF THE DELIVERY SCHEDULE WITH MULTIPLE DELIVERY DATES AND THE MENU FOR THE ACTIONS COLUMN.

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.
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.



22 EXAMPLE OF THE OUTLINE WITH THREE OUTSTANDING REQUIRED QUESTIONS THAT NEED TO BE ADDRESSED BEFORE SUBMITTING.

7. When all errors are resolved, the Set Status window will close and an e-signature window will appear. Enter your CU IdentiKey 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 that are 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.



23 AN EXAMPLE OF THE ANIMAL ORDER OUTLINE FILTERS.

- **Placed Deliveries**



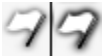
This filter displays deliveries that have been placed.

- **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 are 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.

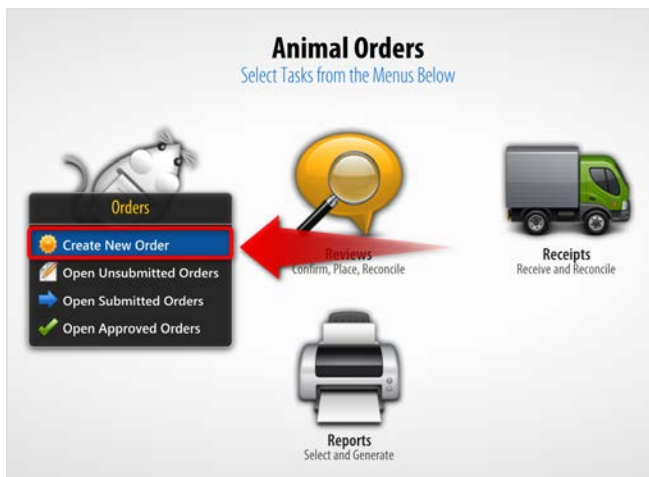
ORDER NEW CAGE CARDS FOR WEANINGS

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.

1. Under **Operations**, click on **Animal Orders**.




2. Hover over **Orders**. In the menu that appears, select **Create New Order**.

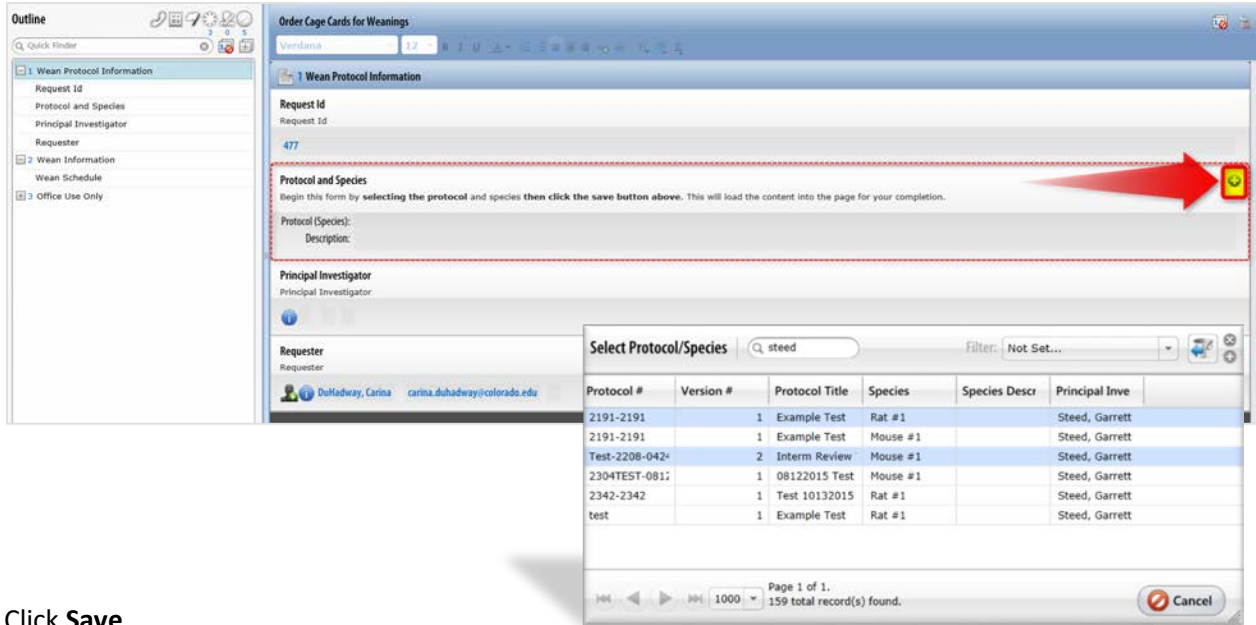


3. Select **Order Cards for Weanings**.

Select Form		
Name	Description	Type
Animal Ordering Form	OAR NON-USDA Animal Species Ordering Form	Animal Order
Import Request Form	OAR Import Request Form - Quarantine Program	Animal Order
Order Cards for Weaning	Cage Card request form for labs performing their own weans.	Animal Order

Complete Section 1: "Wean Protocol Information"

1. Click the  button to open the protocol selection tool. Then select the associated protocol.



The screenshot shows the 'Wean Protocol Information' form. The 'Request Id' is 477. The 'Protocol and Species' section is highlighted with a red dashed border, and a red arrow points to a yellow 'Save' button in the top right corner of this section. Below the form, a 'Select Protocol/Species' dialog box is open, showing a search for 'steed' and a table of results.

Protocol #	Version #	Protocol Title	Species	Species Descr	Principal Inve
2191-2191	1	Example Test	Rat #1		Steed, Garrett
2191-2191	1	Example Test	Mouse #1		Steed, Garrett
Test-2208-042+	2	Interm Review	Mouse #1		Steed, Garrett
2304TEST-081:	1	08122015 Test	Mouse #1		Steed, Garrett
2342-2342	1	Test 10132015	Rat #1		Steed, Garrett
test	1	Example Test	Rat #1		Steed, Garrett

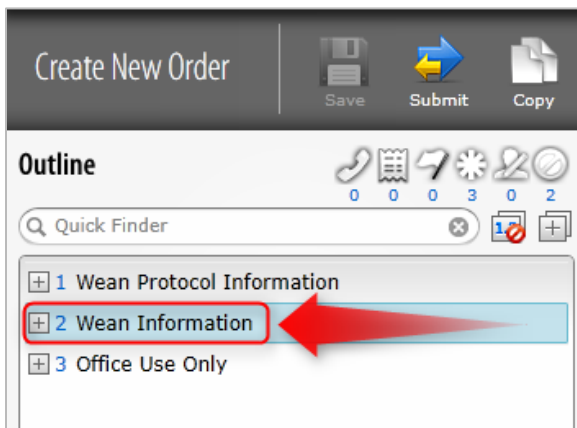
2. Click **Save**.



A close-up of the 'Create New Order' toolbar. The 'Save' button, represented by a floppy disk icon, is highlighted with a red box and a red arrow pointing to it. Other buttons for 'Submit', 'Copy', and 'Print' are also visible.

Complete Section 2: "Wean Information"

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

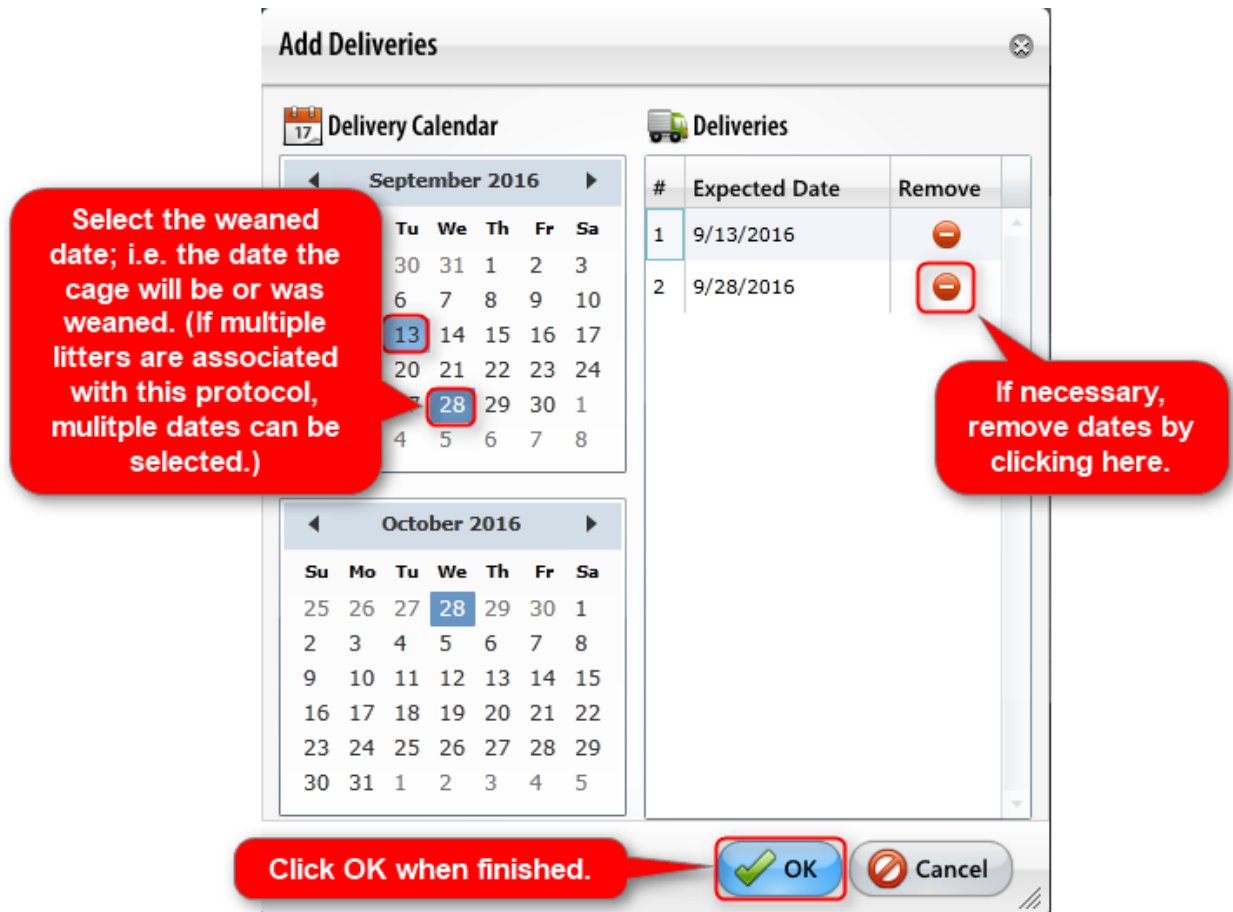


The screenshot shows the 'Outline' section of the form. The 'Wean Information' item, labeled '2 Wean Information', is highlighted with a blue background and a red box. A red arrow points to this item. The 'Outline' also shows '1 Wean Protocol Information' and '3 Office Use Only'.

2. Click **Schedule Deliveries**.



3. Set the date the litter will be weaned and placed in new cages.



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



5. Complete the delivery subform. (See instructions on following page.)

Delivery 1 - 9/13/2016 Placed: <M/d/yyyy> 15 Received:



Emergency Contact
Please enter emergency contact first and last name

1

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



2

Per Diem Account
Per Diem Account
DuHadway, Carina - 13002981

3  

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

Strain/Stock/Breed
If your S/S/B is not listed here please submit the request to add the strain to your protocol [here](#)

4  

Birth Date
Birth Date +/- 3 days

5 15 Enter the date the litter was born.



Animals per Pain Category
Please enter number of animals born (for animal usage reporting).

7 Current Totals (ALL Orders)

Requested: 0 On Order: 0 Received: 1 Adjustment: 0 Available: 599

Pain Category	# Males	# Females	# Either	Requ...	On...	Recei...	Adjust...	Authori...	Available	Percent...
USDA C	0	0	0	0	0	1	0	600	599	0.17

Housing Location
Animal location, please select the requested room location

8  

Cage Type
Choose one from the drop down menu

9

Number Per Cage
Number of animals per cage

10 Males: Females:

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

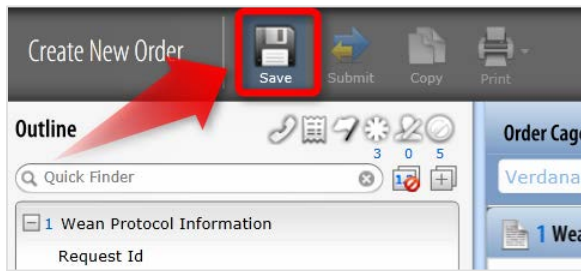
11

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

12

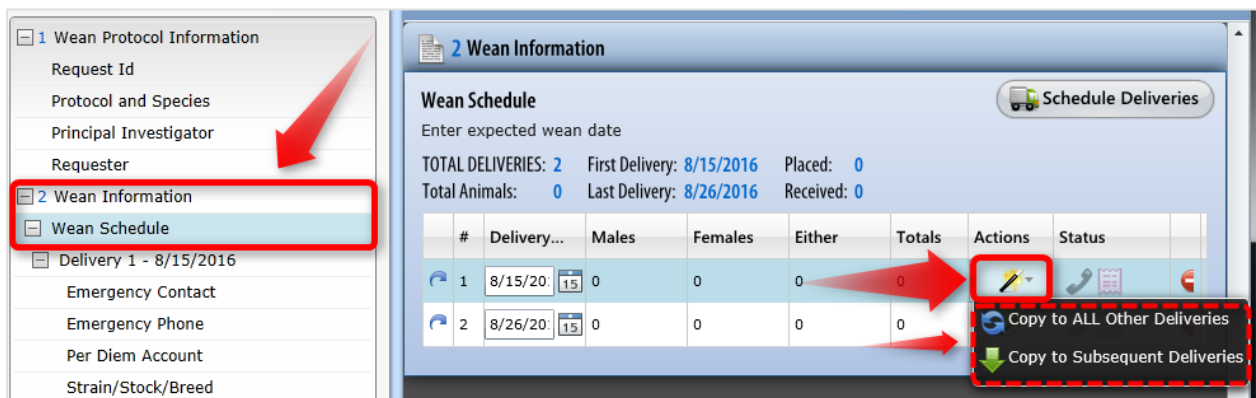
Cage Card Handling
All cage cards will be filed for pickup and placement by lab personnel unless the text "Place" is entered below. If you are using the "Place" method your card will be placed on the cages flagged with temporary cage cards by OAR Staff. (Please make sure the Temporary Cage Card is fully completed and visible).

6. Click **Save**.

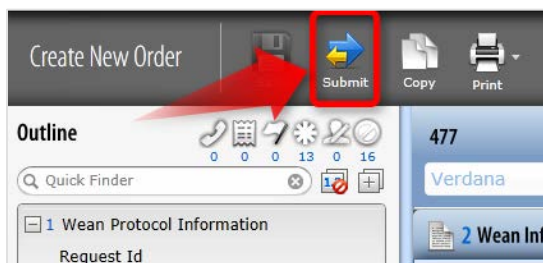


Schedule Multiple Deliveries

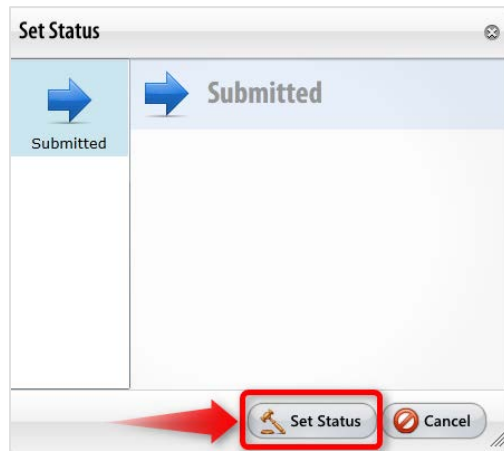
1. Go to **Wean Schedule**.
2. If you would like to copy details from the subform you just completed (e.g. contact info, per diem account), open the **Actions** dropdown and selecting **Copy to ALL** or **Subsequent Deliveries**.
3. Open the subsequent delivery forms and **make changes specific to that weaning request** – animal numbers, strain, birthdate, etc.



4. Click **Submit**.



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



6. Complete e-signature form by entering your login credentials and clicking Save.
 - a. Make note of the **Item Name** (aka the Request ID) for your records.