



## ARC ASSISTANT

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*Animal Resource Center: Animal Management*

Version 10.03.02

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# ARC Assistant – Animal Management

The information in this manual pertains to the functionality available under the Animal Management tab of a study.

## Enabling Animal Management for a Study

Animal Management is accessible within an IACUC study record that has been flagged as using Animal Management. When a study record is first created in iRIS, the user filling out the Study Application will first be asked if the study is using Animal Research. If this is answered yes, then a question will populate asking whether the study uses Animal Facility Management.

The screenshot displays the 'Study Application' form in iRIS. The form is titled 'Study Application' and includes a 'Back' button in the top right corner. Below the title, there are two buttons: 'Save Section' and 'Save and Continue to Next Section'. The form is divided into two main sections: 'Section view of Application' and 'Entire view of the Application'. The 'Section view of Application' is currently selected, showing a sidebar with '1.0 General Information'.

The main content area contains several questions:

- Please identify the Study Classification?** (Dropdown menu with "--none--" selected)
- Please identify the Study Phase:** (Dropdown menu with "--none--" selected)
- Is this study going to be conducted in multiple locations?** (Radio buttons for Yes and No)
- Is this Study using Animal Research?** (Radio buttons for Yes and No, with 'Yes' selected)
- Is this Study using Animal Facility Management?** (Radio buttons for Yes and No, with 'Yes' selected)

The 'Is this Study using Animal Research?' and 'Is this Study using Animal Facility Management?' questions are highlighted with red boxes.

Answering yes to this question will create the Animal Management tab within the study.

Study Nickname: Mouse Study  
 PI: Investigator, Susan

## Submissions

Study Status: **Active**      IACUC Number : ANI-16-500      Study Title :

Submissions    Study Management    **Animal Management**

Current Approval Packet

### Protocol Items

- Protocol Items
- Study Application
- Other Study Documents ▶

## Animal Summary

At the top of the Animal Management tab are two items, a list of approved animals and an order tally graph.

## Approved Animals

This provides a listing of the species, strain, stock #/order code, sex, age, and breeding status of animals approved for use in the study.

Study Nickname: Mouse Study      **Animal Management**      Back

PI: Investigator, Susan

Study Status: **Active**      IACUC Number : ANI-16-500      Study Title : Mouse Study

Submissions    Study Management    **Animal Management**

**Animal Orders**

- Animal Ordering
- Animal Transfer

**Cage Management**

- Animal Details
- Animal Breeding

Forms

**Approved Animals**

Species:	Mouse
Strain:	(Mer-Cre-Mer) Cre
Stock #/Order Code:	
Sex:	Male and Female
Age:	3 months
Breeding:	Yes

**Order Tally**

Species: Mouse		
300 Approved	0 Pending	300 Available

Total Approved: 300  
 Total Pending: 0  
 Total On Study: 0  
 Total Available: 300

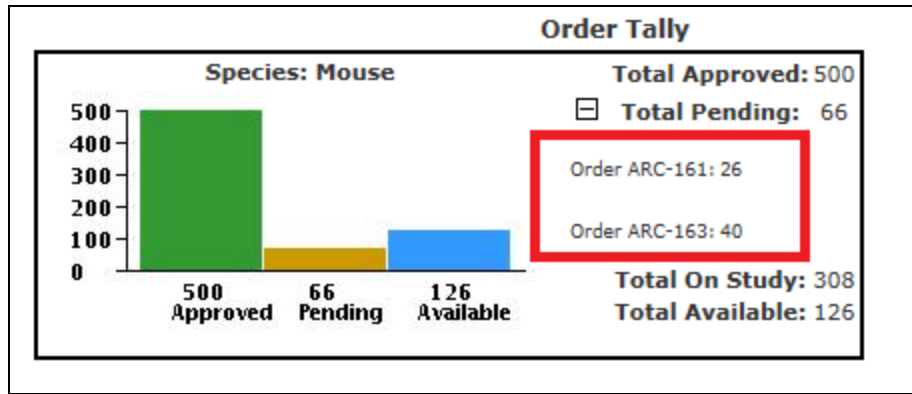
Add a New Order

## Order Tally

This graph indicates the following information:

**Total Approved:** The total number of approved animals for the study. (If you are using ARC in conjunction with the IACUC module, see the IACUC Assistant – Submission Processing manual for more information on approving animals).

**Total Pending:** The totals for all submitted order/transfer requests and ordered animals that have not been received. Click the plus icon to view the order numbers contributing to the pending total.



**Total on Study:** The total number of animals received by ARC and placed in quarantine or on the study.

**Total Available:** Total Pending and Total on Study subtracted from Total Approved, i.e., the total number of animals that can still be added to the study.

Study Nickname: Mouse Study  
 PI: Investigator, Susan

**Animal Management** Back

Study Status: Active    IACUC Number: ANI-16-500    Study Title: Mouse Study

Submissions    Study Management    **Animal Management**

**Animal Orders**

- Animal Ordering
- Animal Transfer

**Cage Management**

- Animal Details
- Animal Breeding

Forms

**Approved Animals**

Species:	Mouse
Strain:	(Mer-Cre-Mer) Cre
Stock #/Order Code:	
Sex:	Male and Female
Age:	3 months
Breeding:	Yes

**Order Tally**

Category	Count
Approved	300
Pending	0
Available	300
<b>Total Approved</b>	<b>300</b>
<b>Total Pending</b>	<b>0</b>
<b>Total On Study</b>	<b>0</b>
<b>Total Available</b>	<b>300</b>

If multiple species have been approved for use on a study, a graph and corresponding totals will display for each species.

## Animal Orders

### Animal Ordering

When you first open the Animal Management tab, you are automatically placed on the Animal Ordering portion of the screen.

The Animal Ordering table lists different order statuses, including:

**Draft:** The order form has been filled out, but not yet submitted to ARC

**New Request:** The order form has been filled out and submitted to ARC

**Ordered – Pending Receipt:** The order has been submitted to the vendor

**Completed:** The order has been received

Order statuses can be configured under ARC Assistant > Review Board Administration > System Setup > Setup Order Status.

Animal Ordering <span style="float: right;">+ Add a New Order</span>									
4 result(s) found...									
Edit/View	Status	Order Number	Requested Item	Requested Quantity	Received Amount	Track Location	Retract Order	Delete Order	Copy Order
	New Request	ORD-16-062	Mouse - (Mer-Cre-Mer) Cre	5	0				
	Ordered - Pending Receipt	ORD-16-061	Mouse - (Mer-Cre-Mer) Cre	5	0				
	Draft	ORD-16-060	Mouse - (Mer-Cre-Mer) Cre	5	0				
	Completed	ORD-16-059	Mouse - (Mer-Cre-Mer) Cre	5	5				

To view the details of an order, click the icon in the Edit/View column.

The Order Number column lists order numbers, which are generated when a new order is saved. For more information about configuring order numbers, consult the ARC – Review Board Administration manual.

The Requested Item, Requested Quantity, and Received Amount columns detail the species and strain requested, the number of animals requested, and the number that have been marked as received.

Clicking the icon in the Track Location column opens the Submission Tracking screen.

Protocol nickname 2: Mouse Study PI: Investigator, Jane, M.D.				Workflow - Submission Tracking <span style="float: right;">Back</span>	
Status	View Details	Date Received / Date Completed		Event Description	
		12/21/2016 02:58 PM PST		ARC received the submission	
		12/21/2016 02:58 PM PST 12/21/2016 02:58 PM PST		Changed Order Status to New Request	
		12/21/2016 02:58 PM PST 12/21/2016 02:58 PM PST		Jane Investigator, M.D. as Principal Investigator review and apply signoff	
		12/21/2016 02:57 PM PST 12/21/2016 02:58 PM PST		Animal Resource Center Order Form is waiting to be submitted	

This allows you to ensure that the form is going through the workflow properly and that ARC has received the submission.

The icon in the Retract Order column is available for orders that have been submitted to ARC but not yet ordered from the vendor. Retracting the order returns it to Draft status and will allow you to edit the order and resubmit it. It also subtracts the number of animals from the Pending total and adds them back to the Approved total.

The icon in the Delete Order column is available for Draft orders that have not yet been submitted to ARC.

Clicking the icon in the Copy Order column creates a new Draft version of an order that you wish to duplicate.

## Add a New Order

Clicking the **Add a New Order** button brings you to the animal order form.

Protocol nickname 2: Mouse Study  
PI: Investigator, Jane, M.D.

**Animal Resource Center Order Form - (Version 5.0)** Back

Study Status: Active    IACUC Number: IACUC-2016-0612    Study Title: Mouse Study

Save Form

---

Order Number: <Generated on Save>

Order Status: **Draft**

\* Order Date: 12/22/2016

\* Preferred Delivery Date: 12/23/2016

\* Preferred Vendor: Animal Vendor 1

**Requested Animals:**

Requested Species: Mouse

\* Requested Strain: (Mer-Cre-Mer) Cre

Total Approved Animals: 300

Total Available Animals: 285

\* Stock #/Order Code: 1

\* Age/Size: 3 months

The order form contains the following data values:

**Order Number:** This is automatically generated when the form is saved. Order numbering is configured under Review Board Administration > Setup Order Numbering. For more information about configuring order numbers, please consult the ARC – Review Board Administration manual.

**Order Status:** This is automatically generated by the system. Orders are first created in Draft status.

**Order Date:** This field is automatically populated with today's date, but can be edited.

**Preferred Delivery Date:** This is an editable date field.

**Preferred Vendor:** This field contains a dropdown list of vendors. Vendors are configured under System Administration > List Configuration and Maintenance > Business Associate List. More information about this configuration is available in the System Administration - List Config - System Setup manual.

### Requested Animals

**Requested Species:** This dropdown list contains the approved species on the study.

**Requested Strain:** Once the Requested Species has been selected, this field will populate with the available strains.

**Total Approved Animals:** Indicates the total number of animals approved for the study.

**Total Available Animals:** Indicates the number of animals still available to order.

**Stock #/Order Code:** This is a text field where you can enter the stock number/order code.

**Age/Size:** This field is auto-populated from the study application, but can be edited.

**Health Status:** This field is auto-populated from the study application, but can be edited.

**Unique Anatomical Features/Phenotype:** This field is auto-populated from the study application, but can be edited. You can turn on and off this field using the `system.use_arc_unique_anatomical_features` system property, available under Animal Resource Center properties.

**Special Care:** This field is auto-populated from the study application, but can be edited.

**Special Conditions:** This field is auto-populated from the study application, but can be edited.

**Breeding:** This field is auto-populated from the study application, but can be edited.

**Number of Requested Males/Females:** In these fields, you can enter the total number of male and female animals you wish to order.

**Number of Animals per Approved Pain Category:** In this table, you can enter the number of animals in each pain category. The total number of animals listed in this table must equal the total number of animals requested in the above fields.

<b>*Number of Requested Males:</b>	<input type="text" value="20"/>								
<b>*Number of Requested Females:</b>	<input type="text" value="20"/>								
<b>*Number of Animals per Approved Pain Category:</b>	<table border="1"> <thead> <tr> <th style="background-color: #b0c4de;">B</th> <th style="background-color: #b0c4de;">C</th> <th style="background-color: #b0c4de;">D*</th> <th style="background-color: #b0c4de;">E*</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="20"/></td> <td><input type="text" value="20"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> </tr> </tbody> </table>	B	C	D*	E*	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
B	C	D*	E*						
<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="0"/>	<input type="text" value="0"/>						

### *Proposed Location*

**Number of Cages:** In this field, you can enter the number of cages needed to house the new animals. When you enter a number in this field, the system generates the Cage Location(s) table.

**Cage Location(s):** This table is where you can enter the proposed cage types and locations for the new animals. To fill in a whole column with the same information, click the **All** button under the column name. The lists for Cage Type, Facility, Floor, and Room are configured under Review Board Administration > System Setup > Setup Cage Types and Setup Facilities/Floors/Rooms. The number of animals entered in the Cage Location(s) table must equal the total number of animals requested or the form will not validate.

\*Number of Cages:

* Cage Type:	* Facility:	Floor:	* Room:	* Number of Males:	* Number of Females:	Total:
<input type="button" value="All"/>	<input type="button" value="All"/>	<input type="button" value="All"/>	<input type="button" value="All"/>			
CAGE	Fac 001	2	120	5	5	10
CAGE	Fac 001	2	120	5	5	10
CAGE	Fac 001	2	120	5	5	10
CAGE	Fac 001	2	120	5	5	10
				20	20	40

**Funding**

In this part of the form, you first either need to upload a **Federal Document**, enter a **Foundation PO #**, or enter a **Requisition #**. You can turn on and off the Foundation Number and Requisition Number fields using the system.use\_arc\_foundation and system.use\_arc\_requisition system properties, available under Animal Resource Center properties.

\*Funding:

	Delete	Name	Date	View the Document
No documents have been uploaded.				

Foundation (Enter PO #):

Requisition (Enter Requisition #):

In addition, there are two fields to enter charge account numbers.

**Order Charge Account:** In this field, you can enter the account number for the animal order. If system.use\_arc\_study\_accounts is set to “Yes,” this field will be a dropdown menu that pulls account numbers from the cost centers set up under Study Management.

**Housing Charge Account:** In this field, you can enter the account number for the animal housing order.

**Saving/Signing Off on the Order**

Clicking **Save Form** validates the form to ensure that all required fields are filled out and that the total number of animals requested doesn’t exceed the total number of animals available for the study. The pain category and cage fields will also validate against the number of animals requested, as described above.

The following screen will open, giving you the options to **Exit Form**, which will return you to the main Animal Management screen, **Signoff and Submit**, and **Return to Form**, which will allow you to return to the form for further editing.

Protocol nickname: Application for Animal Research  
 PI: Investigator, Susan

**Animal Resource Center Order Form**

Back

Study Status: Pending - Submitted for Initial Review  
 Study Title: Application for Animal Research

---

**Form has been Completed!**

Exit Form

Signoff and Submit

Return to Form

Click **Signoff and Submit** to open the Submission Routing Signoff screen. Here, the Principal Investigator can Approve or Deny the submission and enter his or her UIN and Password to sign off on it.

**Submission Routing Signoff**

Back

Save Signoff

Study Title: Mouse Study  
 Submission Reference Number: 005101

Printable Version

Include in PDF Packet	Submission Component Name - Version
<input type="checkbox"/>	Animal Resource Center Order Form - (Version 5.0)

Jane Investigator, M.D. as Principal Investigator  
 do you Approve or Deny this submission?

Approve   
  Deny   
 Comments: [Click here to add comments.](#)

This form requires your electronic signature.  
 Please enter your UIN & SSO:

UIN:   
 SSO:

Save Signoff

Click **Save Signoff** to continue. If the PI approved the submission, the order will be sent to ARC for further processing.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Workflow - Submission Tracking**

Back

Print Friendly

Status	View Details	Date Received / Date Completed	Event Description
		12/22/2016 08:56 AM PST	ARC received the submission
		12/22/2016 08:56 AM PST 12/22/2016 08:56 AM PST	Changed Order Status to New Request
		12/22/2016 08:53 AM PST 12/22/2016 08:56 AM PST	Jane Investigator, M.D. as Principal Investigator review and apply signoff
		12/22/2016 08:52 AM PST 12/22/2016 08:53 AM PST	Animal Resource Center Order Form is waiting to be submitted

## Animal Transfer

To initiate an animal transfer, select Animal Transfer from the menu on the left-hand side of the screen.

Protocol nickname 2: Mouse Study  
PI: Investigator, Jane, M.D.

**Animal Management** Back

Study Status: Active IACUC Number: IACUC-2016-0612 Study Title: Mouse Study

Submissions Study Management **Animal Management**

**Animal Orders**

- Animal Ordering
- Animal Transfer
- Cage Management
- Animal Details
- Animal Breeding
- Forms

**Approved Animals**

Species: Mouse  
Strain: (Mer-Cre-Mer) Cre  
Stock #/Order Code: 1  
Sex: Male and Female  
Age: 3 months  
Breeding: Yes

**Order Tally**

Species: Mouse

Total Approved: 300  
Total Pending: 15  
Total On Study: 5  
Total Available: 280

Animal Transfer Add a New Transfer

0 result(s) found...

Edit/View	Status	Type	Order Number	Requested Item	Transfer Source	Requested Quantity	Received Amount	Track Location	Retract Transfer	Delete Transfer	Copy Transfer
No transfers have been added.											

Click the **Add a New Transfer** button to open the Transfer Type Selection window. In this window, you can select whether you would like to initiate an Internal Transfer or an External Transfer. Internal transfers refer to transfers from other studies at the same institution, while external transfers come from a different institution.

Transfer Type Selection:

+ Please select the transfer type:

Internal Transfer

External Transfer

Continue

Make a selection, and click **Continue** to proceed to the Transfer Form.

### Internal Transfer

To add an internal transfer, you first need to ensure that there are study(s) in the system that both have the same species and strain of animals available and are set as Available for Internal Animal Transfers. To make a study eligible for internal transfers, navigate to the Study Management tab of the study > Study Summary/Profile. Ensure that Yes is selected next to “Available for Internal Animal Transfers.”

Protocol nickname 2: Mouse Study  
PI: Investigator, Jane, M.D.

**Study Summary** Back

Study Status: Active    IACUC Number: IACUC-2016-0612    Study Title: Mouse Study

Print Friendly    Save Changes

Study Title:	Mouse Study
Status:	Active
Protocol nickname 2:	Mouse Study
Use Subject Tracking:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Use Animal Facility Management:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Use Electronic Data Capture(EDC):	<input type="radio"/> Yes <input checked="" type="radio"/> No
VA Number:	
Current Enrollment:	
Consent Form Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Animal Research:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Available for Internal Animal Transfers:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Accrual Ceiling:	
Radiation Use:	

The Internal Transfer Form contains the following data values:

**Transfer Number:** This is automatically generated when the form is saved. Transfer numbering is configured under Review Board Administration > Setup Transfer Numbering. For more information about configuring transfer numbers, please consult the ARC - Review Board Administration manual.

**Order Status:** This is automatically generated by the system. Orders are first created in Draft status.

**Request Date:** This field is automatically populated with today's date, but can be edited.

**Date of Proposed Transfer:** This is an editable date field.

**Source:** This read-only data value indicates that this is an Internal transfer.

### *Requested Animals*

**Requested Species:** This dropdown list contains the approved species on the study.

**Requested Strain:** Once the Requested Species has been selected, this field will populate with the available strains.

**Total Approved Animals:** Indicates the total number of animals approved for the study.

**Total Available Animals:** Indicates the number of animals still available to order.

**Stock #/Order Code:** This is a text field where you can enter the stock number/order code.

**Age/Size:** This field is auto-populated from the study application, but can be edited.

**Health Status:** This field is auto-populated from the study application, but can be edited.

**Unique Anatomical Features/Phenotype:** This field is auto-populated from the study application, but can be edited.

**Special Care:** This field is auto-populated from the study application, but can be edited.

**Special Conditions:** This field is auto-populated from the study application, but can be edited.

**Breeding:** This field is auto-populated from the study application, but can be edited.

**Number of Requested Males/Females:** In these fields, you can enter the total number of male and female animals you wish to transfer. Please note that transfers are done on a cage by cage basis, so if the number you request does not equal

the specific number in a cage on the study you are requesting the transfer from, you will not receive the exact number of requested animals.

**Number of Animals per Approved Pain Category:** In this table, you can enter the number of animals in each IACUC-approved pain category. The total number of animals listed in this table must equal the total number of animals requested in the above fields.

<b>*Number of Requested Males:</b>	<input type="text" value="20"/>								
<b>*Number of Requested Females:</b>	<input type="text" value="20"/>								
<b>*Number of Animals per Approved Pain Category:</b>	<table border="1"> <thead> <tr> <th>B</th> <th>C</th> <th>D*</th> <th>E*</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="20"/></td> <td><input type="text" value="20"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> </tr> </tbody> </table>	B	C	D*	E*	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	B	C	D*	E*					
<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="0"/>	<input type="text" value="0"/>						

*Originating Study*

If, as described above, there are studies with transferable animals available in the system, you will see the **Search Studies** button at the top of this section.

**Originating Study:**

+ Search Studies

**\*IACUC Number:**

**\*Principal Investigator:**

**\*Original Animal Order Number:**

**\*Lab Contact Person:**

**\*Phone Number:**

**\*Email:**

**\*Number of Cages:**

Click this button to open the Find a Study: Search Options window.

Find A Study: Search Options X

<b>IACUC Number:</b> <input style="width: 90%;" type="text"/>	<b>Protocol nickname 2:</b> <input style="width: 90%;" type="text"/>
<b>Principal Investigator :</b> <input style="width: 90%;" type="text"/>	<b>Site:</b> <input style="width: 90%;" type="text"/>
<b>Additional Investigators:</b> <input style="width: 90%;" type="text"/>	<b>Sponsor:</b> <input style="width: 90%;" type="text"/>
<b>Species:</b> Mouse	<b>Strain:</b> (Mer-Cre-Mer) Cre

**Find Studies**

0 result(s) found... 0 - 0

Select Study	IACUC Number	Study Alias Study Title	Principal Investigator	Primary Department
No results found. Click Find Studies to search for studies that match the filter criteria.				

At the top of this window, there are fields that you can use to narrow down your search:

**IACUC Number:** In this field, enter all or part of the study’s IACUC number.

**Principal Investigator:** When you begin typing in this field, a list will populate of the users in the system with the corresponding letter(s) in their names.

**Additional Investigators:** When you begin typing in this field, a list will populate of the users in the system with the corresponding letter(s) in their names.

**Species:** The species is read-only.

**Protocol nickname:** In this field, enter all or part of the protocol nickname.

**Department:** When you begin typing in this field, a list will populate of the departments in the system with the corresponding letter(s) in their names.

**Sponsor:** When you begin typing in this field, a list will populate of the sponsors in the system with the corresponding letter(s) in their names.

**Strain:** The strain is read-only.

Enter information in some or all of the above fields to narrow down your search and click **Find Studies** to obtain your search results. Alternatively, you can click **Find Studies** with no information entered in the search filters to return all available studies in the system.

**Find A Study: Search Options** X

IACUC Number: <input style="width: 90%;" type="text"/>	Protocol nickname: <input style="width: 90%;" type="text"/>
Principal Investigator: <input style="width: 90%;" type="text"/>	Department: <input style="width: 90%;" type="text"/>
Additional Investigators: <input style="width: 90%;" type="text"/>	Sponsor: <input style="width: 90%;" type="text"/>
Species: Mouse	Strain: (Mer-Cre-Mer) Cre

Find Studies

1 result(s) found... 1 - 1

Select Study	IACUC Number	Study Alias Study Title	Principal Investigator	Primary Department
	ANI-16-482	Application for Animal Researc ... Application for Animal Research	Investigator, Susan	

Click the icon in the Select Study column to select a study and return to the main internal transfer form. The **IACUC Number** and **Principal Investigator** fields will be populated with the information from the study you selected.

**Original Animal Order Number:** In this field, enter the original animal order number.

**Lab Contact Person:** In this field, enter the name of the lab contact person.

**Phone Number:** In this field, enter the phone number of the lab contact person.

**Email:** In this field, enter the email address of the lab contact person.

**Number of Cages:** In this field, enter the number of cages you wish to transfer from the originating study.

**Cage(s) to be Transferred:** This field is not editable. The cages to be transferred will be determined by the PI of the originating study when they sign off on the transfer.

#### Veterinarian Information

**Name:** This dropdown list is populated with the names of iRIS users configured as veterinarians under Review Board Administration > Setup Veterinarian Profile. The Name field defaults to the user designated as the default veterinarian in

the system. For more information about configuring veterinarians, consult the ARC - Review Board Administration manual.

**Phone Number:** If a phone number is listed under the veterinarian’s iRIS user account, it will populate here. The field is also editable.

**Fax Number:** If a fax number is listed under the veterinarian’s iRIS user account, it will populate here. The field is also editable.

**Email:** If an email address is listed under the veterinarian’s iRIS user account, it will populate here. The field is also editable.

**Transfer Coordinator**

**Name:** This dropdown list is populated with the names of iRIS users configured as transfer coordinators under Review Board Administration > Setup Transfer Coordinator Profile. The Name field defaults to the user designated as the default transfer coordinator in the system. For more information about configuring transfer coordinators, consult the ARC – Review Board Administration manual.

**Phone Number:** If a phone number is listed under the transfer coordinator’s iRIS user account, it will populate here. The field is also editable.

**Fax Number:** If a fax number is listed under the transfer coordinator’s iRIS user account, it will populate here. The field is also editable.

**Funding**

In this part of the form, you first either need to upload a **Federal Document**, enter a **Foundation PO #**, or enter a **Requisition #**.

**\*Funding:**

**Federal  
(Upload Document):**

Upload...

Delete	Name	Date	View the Document
No documents have been uploaded.			

**Foundation  
(Enter PO #):**

**Requisition  
(Enter Requisition #):**

In addition, there are two fields to enter charge account numbers.

**Order Charge Account:** In this field, you can enter the account number for the animal order. Depending on your system configuration, you may see a dropdown list of account numbers here, pulled from the cost centers added to the study.

**Housing Charge Account:** In this field, you can enter the account number for the animal housing order.

**Saving/Signing Off on the Transfer**

Clicking **Save Form** validates the form to ensure that all required fields are filled out and that the total number of animals requested doesn’t exceed the total number of animals available for the study. The pain category field will also validate against the number of animals requested, as described above.

On the following screen, you will have the options to **Exit Form** to return to the main Animal Management screen, **Signoff and Submit**, or **Return to Form** for further editing.


Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Animal Resource Internal Transfer Form - (Version 1.0)** Back


<b>Study Status:</b>	Active	<b>IACUC Number :</b>	IACUC-2016-0612	<b>Study Title :</b>	Mouse Study
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### Form has been Completed!

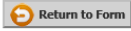
  
  
  



Exit Form



Signoff and Submit




Return to Form

Click **Signoff and Submit** to open the Submission Routing Signoff Sheet. The first signoff for this form is for the PI of the originating study. On the Submission Routing Signoff Sheet, the Principal Investigator can Approve or Deny the submission and enter his or her UIN and Password to sign off on it.

**Submission Routing Signoff Sheet** Back

Study Title: Application for Animal Research  
 Submission Reference Number: 004921




Create PDF Packet

Include in PDF Packet	Submission Component Name - Version
<input type="checkbox"/>	Animal Resource Internal Transfer Form - (Version 3.0) (Parent of the submission package)

Susan Investigator as Principal Investigator do you Approve or Deny this submission?  Approve  Deny

This form requires your electronic signature. Please enter your UIN & Password:

UIN:	<input style="width: 80%;" type="text" value="investigator"/>
Password:	<input style="width: 80%;" type="password" value="*****"/>



Save Signoff

Select Approve or Deny, enter your UIN and Password, and click **Save Signoff** to process the submission. If you deny the submission, an option will appear to add comments pertaining to the denial. The transfer will be given a status of “Denied” and will no longer be active.

If the original internal transfer request is approved, the internal transfer form will next be routed to the PI for the study that will be supplying the animals (the “Originating PI”). The routing of the transfer form is configured in its workflow under System Administration > Workflow Designer.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Workflow - Submission Tracking**

Back

Print Friendly

Status	View Details	Date Received / Date Completed	Event Description
		12/22/2016 11:29 AM PST	Animal Resource Internal Transfer Form review transfer request by the Principal Investigator: Jane Investigator, M.D.
		12/22/2016 11:29 AM PST 12/22/2016 11:29 AM PST	Changed Transfer Status to Approved for Ordering
		12/22/2016 11:28 AM PST 12/22/2016 11:28 AM PST	Jane Investigator, M.D. as Principal Investigator review and apply signoff
		12/22/2016 11:28 AM PST 12/22/2016 11:28 AM PST	Animal Resource Internal Transfer Form is waiting to be submitted

The Originating PI will receive a home screen task for the signoff, as well as system email notifications, if they are configured. Routing notifications for transfers are configured under Review Board Administration > Internal Transfer Originating PI Signoff Notification Setup, Internal & External Transfer Coordinator Signoff Notification Setup, and Internal & External Transfer Veterinarian Signoff Notification Setup. For more information about configuring notifications, please see the ARC - Review Board Administration manual.

**Below are your incomplete Study tasks:**

- Waiting Submission 2
- Submission Routing Signoff 4
- Submission Reviewer by System Role 1
- Animal Transfer Originating PI Signoff** **2**

2 task(s) found... 1 - 2

Open	Principal Investigator	Study Alias	Task Name	Received
	Susan Investigator	Application for Animal Research	Animal Resource Internal Transfer Form review transfer request by the Principal Investigator: Susan Investigator	04/29/2016
	Susan Investigator	Application for Animal Research	Animal Resource Internal Transfer Form review transfer request by the Principal Investigator: Susan Investigator	04/29/2016

Opening the Originating PI Signoff task will bring the originating PI to the Submission Routing Signoff Sheet. At the top of the screen, you can click the icon next to Request Information to expand and view information regarding the original transfer request. Click to minimize this information again.

**Submission Routing Signoff Sheet** Back

Study Title: Application for Animal Research  
 Submission Reference Number: 004921

Request Information:

Transfer Number: TRN-16-5  
 Order Status: **Pending Approval**  
 \*Request Date: 04/29/2016  
 \*Date of Proposed Transfer: 04/29/2016  
 Source: Internal

**Requested Animals:**

Requested Species: Mouse  
 \*Requested Strains: (Mer-Cre-Mer) Cre  
 Total Approved Animals: 600  
 Total Available Animals: 196  
 \*Stock # /Order Code: 123  
 \*Age/Size: 3 months  
 \*Health Status:  SPF  Conventional  
 Immune Compromised  Wild-caught  
 Germ-free  
 \*Unique Anatomical Features/Phenotype: none  
 Special Care:  
 Special Conditions:  
 \*Breeding:  Yes  No  
 \*Number of Requested Males: 10

A unique feature of this particular signoff sheet is the Cage(s) to be Transferred section, which allows you, as the Originating PI, to designate the specific cages that will be transferred to the receiving study.

**Submission Routing Signoff Sheet** Back

Study Title: Application for Animal Research  
 Submission Reference Number: 004920

Request Information:

Cage(s) to Transferred:

Cage ID	Cage Type	Facility	Room	Number of Males	Number of Females	Total
The Principal Investigator from the Originating Study has not added any cages to be transferred.						

Susan Investigator as Internal Transfer Originating Principal Investigator  
 do you Approve or Deny this submission?  Approve  Deny

This form requires your electronic signature.  
 Please enter your UIN & Password:

UIN:   
 Password:

Click the **Select the Cage(s) to be Transferred** button to open the list of cages.

Select Cages to be Transferred: X

	Cage ID	Cage Type	Facility	Room	Number of Males	Number of Females
<input type="checkbox"/>	ANI-16-482_00002	Mouse Cage	Fac 001	108	10	0
<input type="checkbox"/>	ANI-16-482_00003	Mouse Cage	Fac 001	108	10	0
<input type="checkbox"/>	ANI-16-482_00004	Mouse Cage	Fac 001	108	10	0
<input type="checkbox"/>	ANI-16-482_00005	Mouse Cage	Fac 001	108	10	0
<input type="checkbox"/>	ANI-16-482_00007	Mouse Cage	Fac 001	108	0	10
<input type="checkbox"/>	ANI-16-482_00008	Mouse Cage	Fac 001	108	0	10
<input type="checkbox"/>	ANI-16-482_00009	Mouse Cage	Fac 001	108	0	10
<input type="checkbox"/>	ANI-16-482_00010	Mouse Cage	Fac 001	108	0	10

Check the boxes next to the cages to transfer, and click **Save**. The cages will then appear in the Cage(s) to be Transferred table, but are still editable until you complete the signoff. Select whether you Approve or Deny the submission, and enter your UIN and Password. If you deny the submission, an option will appear to add comments pertaining to the denial. The transfer will be given a status of “Denied” and will no longer be active.

Click **Save Signoff** to complete the process.

If the transfer is approved by the Originating PI, it is next routed to the Transfer Coordinator.

Animal Transfer Coordinator Signoff				1
1 task(s) found...				1 - 1
Open	Principal Investigator	Study Alias	Task Name	Received
	Jane Investigator, M.D.	Mouse Study	Animal Resource Internal Transfer Form review transfer request as the select Transfer Coordinator: Ann Transfer Coordinator, M.D.	12/22/2016

As the Transfer Coordinator, click the icon to open the Submission Routing Signoff Sheet. As described for the previous signoff sheet, you can expand the details of the request at the top of the screen.

This signoff sheet contains a series of questions that can be answered to more fully specify terms for approval of the transfer and describe the use of the animals.

**Submission Routing Signoff** Back

Save Signoff

Study Title: Mouse Study  
Submission Reference Number: 005108

Request Information:

**Special Conditions for Approval:**

None OK to Vivarium  Containment  
 Quarantine  Redevation  
 Use only No Breeding  
 Additional health test on arrival  
 Other  
Describe other choice:

**Will Use of Animals be Experimental:**  Yes  No

**If Yes, How long will they be Housed?:**

**If Terminal, Will Use be Terminal?:**  Yes  No

**If Terminal, Have Personnel been Trained?:**  Yes  No

**Ann Transfer Coordinator, M.D. as Transfer Coordinator do you Approve or Deny this submission?**  Approve  Deny

**Health Information:**

Upload...  

Delete	Name	Date	View the Document
No documents have been uploaded.			

**Is a MTA Required:**  Yes  No

**Comments:**

This form requires your electronic signature. Please enter your UIN & SSO:  
UIN:   
SSO:

Save Signoff

The questions on the page are as follows:

**Special Conditions for Approval:** For this question, you can select one or more conditions from “None, OK to Vivarium,” “Quarantine,” “Use only No Breeding,” “Additional health test on arrival,” “Containment,” “Reservation,” and “Other,” which allows you to enter a description.

**Will Use of Animals be Experimental:** Select Yes or No.

**If Yes, How long will they be Housed?:** In this field, you can enter a time period for housing the animals.

**If Terminal, Will Use be Terminal?:** Select Yes or No.

**If Terminal, Have Personnel been Trained?:** Select Yes or No.

**Health Information:** Here, you can upload documents pertaining to the health of the animals.

**Is an MTA Required:** Select Yes or No.

Next, Approve or Deny the submission and sign off using your UIN and Password. If you deny the submission, an option will appear to add comments pertaining to the denial. The transfer will be given a status of “Denied” and will no longer be active. Click **Save Signoff** to process the submission.

If the transfer is approved by the Transfer Coordinator, it is routed to the Veterinarian.

Animal Transfer Veterinarian Signoff				
1 task(s) found...				1 - 1
Open	Principal Investigator	Study Alias	Task Name	Received
	Jane Investigator, M.D.	Mouse Study	Animal Resource Internal Transfer Form review transfer request as the select Veterinarian: Bob Veterinarian, M.D.	12/22/2016

As the Veterinarian, click the icon to open the Submission Routing Signoff Sheet. As described for the previous signoff sheet, you can expand the details of the request at the top of the screen. The signoff sheet for the Veterinarian also has the same questions as described above for the Transfer Coordinator’s signoff.

Approve or Deny the submission and sign off using your UIN and Password. If you deny the submission, an option will appear to add comments pertaining to the denial. The transfer will be given a status of “Denied” and will no longer be active.

Click **Save Signoff** to process the submission.

After the transfer has gone through the entire approval process, it will be available for processing by ARC. For more information about transfer processing, please see the ARC – Order Processing manual.

### External Transfer

When you initiate an external transfer, you are brought to the Animal Resource Center External Transfer Form.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Animal Resource Center External Transfer Form - (Version 1.0)** Back

Study Status: Active    IACUC Number: IACUC-2016-0612    Study Title: Mouse Study

Save Form

---

**Animal Import Request**

Transfer Number: <Generated on Save>

Order Status: **Draft**

\*Request Date: 12/23/2016

\*Date of Proposed Transfer:

**Requested Animals:**

Requested Species: --none--

\*Requested Strain: --none--

Total Approved Animals: 0

Total Available Animals: 0

\*Stock # /Order Code:

\*Age/Size:

SPF     Conventional

The External Transfer Form contains the following data values:

**Transfer Number:** This is automatically generated when the form is saved. Transfer numbering is configured under Review Board Administration > Setup Transfer Numbering. For more information about configuring transfer numbers, please consult the ARC - Review Board Administration manual.

**Order Status:** This is automatically generated by the system. Orders are first created in Draft status.

**Request Date:** This field is automatically populated with today's date, but can be edited.

**Date of Proposed Transfer:** This is an editable date field.

### *Requested Animals*

**Requested Species:** This dropdown list contains the approved species on the study.

**Requested Strain:** Once the Requested Species has been selected, this field will populate with the available strains.

**Total Approved Animals:** Indicates the total number of animals approved for the study.

**Total Available Animals:** Indicates the number of animals still available to order.

**Stock #/Order Code:** This is a text field where you can enter the stock number/order code.

**Age/Size:** This field is auto-populated from the study application, but can be edited.

**Health Status:** This field is auto-populated from the study application, but can be edited.

**Unique Anatomical Features/Phenotype:** This field is auto-populated from the study application, but can be edited.

**Special Care:** This field is auto-populated from the study application, but can be edited.

**Special Conditions:** This field is auto-populated from the study application, but can be edited.

**Breeding:** This field is auto-populated from the study application, but can be edited.

**Number of Requested Males/Females:** In these fields, you can enter the total number of male and female animals you wish to transfer.

**Number of Animals per Approved Pain Category:** In this table, you can enter the number of animals in each approved pain category. The total number of animals listed in this table must equal the total number of animals requested in the above fields.

<b>*Number of Requested Males:</b>	<input type="text" value="20"/>								
<b>*Number of Requested Females:</b>	<input type="text" value="20"/>								
<b>*Number of Animals per Approved Pain Category:</b>	<table border="1"> <thead> <tr> <th>B</th> <th>C</th> <th>D*</th> <th>E*</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="20"/></td> <td><input type="text" value="20"/></td> <td><input type="text" value="0"/></td> <td><input type="text" value="0"/></td> </tr> </tbody> </table>	B	C	D*	E*	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	B	C	D*	E*					
<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="0"/>	<input type="text" value="0"/>						

### *Originating Facility*

**Institution or Company Name:** In this field, you can enter the name of the institution or company to supply the animals.

**PHS Assurance Number (if applicable):** In this field, you can enter the institution's PHS Assurance Number, if available.

### Animal Transfer Coordinator

In this section, enter the **Name, Phone Number, Fax Number,** and **Email** address of the Transfer Coordinator from the originating facility.

### Investigator Information

At the beginning of this section, enter the **Name, Phone Number, Fax Number,** and **Email** address of the PI of the originating study.

**Protocol Number/Title:** In this field, enter the number/title of the originating study.

**Approval Date:** In this date field, enter the study's approval date.

**Expiration Date:** In this date field, enter the study's expiration date.

**Contact (Lab/Project/Vivarium/Co-PI, etc.):** In this field, you can enter the name of an additional contact on the originating study.

### Veterinarian Information

In this section, enter the **Name, Phone Number, Fax Number,** and **Email** address of the veterinarian for the originating study. In addition, there is a field to enter the **Originating Facility Mailing Address.**

### *Destination Facility*

#### Veterinarian Information

**Name:** This dropdown list is populated with the names of iRIS users configured as veterinarians under Review Board Administration > Setup Veterinarian Profile. The Name field defaults to the user designated as the default veterinarian in the system. For more information about configuring veterinarians, consult the ARC – Review Board Administration manual.

**Phone Number:** If a phone number is listed under the veterinarian's iRIS user account, it will populate here. The field is also editable.

**Fax Number:** If a fax number is listed under the veterinarian's iRIS user account, it will populate here. The field is also editable.

**Email:** If an email address is listed under the veterinarian's iRIS user account, it will populate here. The field is also editable.

#### Animal Transfer Coordinator

**Name:** This dropdown list is populated with the names of iRIS users configured as transfer coordinators under Review Board Administration > Setup Transfer Coordinator Profile. The Name field defaults to the user designated as the default transfer coordinator in the system. For more information about configuring transfer coordinators, consult the ARC - Review Board Administration manual.

**Phone Number:** If a phone number is listed under the transfer coordinator's iRIS user account, it will populate here. The field is also editable.

**Fax Number:** If a fax number is listed under the transfer coordinator’s iRIS user account, it will populate here. The field is also editable.

**Email:** If an email address is listed under the transfer coordinator’s iRIS user account, it will populate here. The field is also editable.

**Destination Facility Mailing Address:** In this field, enter the mailing address of the destination facility.

**Number of Cages:** In this field, enter the number of cages you will need to house the new animals. When you enter a number in this field, the system generates the Cage Location(s) table.

**Proposed Location:** This table is where you can enter the proposed cage types and locations for the new animals. To fill in a whole column with the same information, click the **All** button under the column name. The lists for Cage Type, Facility, Floor, and Room are configured under Review Board Administration > System Setup > Setup Cage Types and Setup Facilities/Floors/Rooms. The number of animals entered in the Proposed Location table must equal the total number of animals requested or the form will not validate.

<b>*Number of Cages:</b> <input type="text" value="2"/>							
<b>Proposed Location:</b>	<b>* Cage Type:</b> <input type="button" value="All"/>	<b>* Facility:</b> <input type="button" value="All"/>	<b>Floor:</b> <input type="button" value="All"/>	<b>* Room:</b> <input type="button" value="All"/>	<b>* Number of Males:</b>	<b>* Number of Females:</b>	<b>Total:</b>
	Mouse Cage	Fac 001	2	120	<input type="text" value="5"/>	<input type="text" value="0"/>	5
	Mouse Cage	Fac 001	2	120	<input type="text" value="0"/>	<input type="text" value="5"/>	5
						5	5

**Funding**

In this part of the form, you first either need to upload a **Federal Document**, enter a **Foundation PO #**, or enter a **Requisition #**.

<b>*Funding:</b>			
<input type="button" value="Upload..."/>			
<b>Federal (Upload Document):</b>	<input type="button" value="Delete"/>	<input type="text" value="Name"/>	<input type="text" value="Date"/>
	<input type="button" value="View the Document"/>		
No documents have been uploaded.			
<b>Foundation (Enter PO #):</b>	<input type="text" value="1234567"/>		
<b>Requisition (Enter Requisition #):</b>	<input type="text"/>		

In addition, there are two fields to enter charge account numbers.

**Order Charge Account:** In this field, you can enter the account number for the animal order. Depending on your system configuration, you may see a dropdown menu that pulls account numbers from the cost centers set up for the study.

**Housing Charge Account:** In this field, you can enter the account number for the animal housing order.

### Saving/Signing Off on the Transfer

Clicking **Save Form** validates the form to ensure that all required fields are filled out and that the total number of animals requested doesn't exceed the total number of animals available for the study.

On the following screen, you can click **Exit Form** to return to the main Animal Management screen, **Signoff and Submit**, or **Return to Form** to return to the form for further editing.




Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Animal Resource Center External Transfer Form - (Version 1.0)** Back

Study Status: Active    IACUC Number : IACUC-2016-0612    Study Title : Mouse Study


---

## Form has been Completed!

 Exit Form
 Signoff and Submit
 Return to Form

Click **Signoff and Submit** to open the Submission Routing Signoff Sheet. Here, the Principal Investigator can Approve or Deny the submission and enter his or her UIN and Password to sign off on it.

**Submission Routing Signoff** Back




Study Title: Mouse Study  
 Submission Reference Number: 005110

Submission Form(s):


Include in PDF Packet	Submission Component Name - Version
<input type="checkbox"/>	Animal Resource Center External Transfer Form - (Version 2.0)


Jane Investigator, M.D. as Principal Investigator  
 do you Approve or Deny this submission?

Approve     Deny   
 Comments:  Click here to add comments.

This form requires your electronic signature.  
 Please enter your UIN & SSO:

UIN:   
 SSO:





Click **Save Signoff** to continue. If the PI approved the submission, the transfer request will be sent to ARC for further processing.

## Cage Management

### Per Diem

The Per Diem tab allows you to view the Per Diem collection dates associated with the study.

Per Diem Collection Dates from  to

Per Diem Collection Dates

1 result(s) found...

View	Per Diem Date
	04/12/2016

At the top of the screen, you can filter the results by entering dates in the from and to boxes. Click the icon to open the calendar and pick a date. After entering dates in both fields, click **Find** to obtain your results.

To view the details of a Per Diem Date, click the icon in the View column. This will open a listing of the details of per diem collected on a given date.

Protocol nickname 2: Animal Supply Study  
 PI: Investigator, Jane, M.D.

**Per Diem Collection for 12/23/2016**

Facility:

Room:

5 result(s) found...

Facility	Room	Cage ID	Cage Type	Cage Details	# of Days	Rate	Cost	Order Number	Vendor
Animal Housing Facility	100	ANI-16-419_00003	Mouse Cage		7	\$2.00	\$140.00	ARC-16-005	Animal Vendor 1
Animal Housing Facility	100	ANI-16-419_00007	Mouse Cage		7	\$2.00	\$140.00	ARC-16-005	Animal Vendor 1
Animal Housing Facility	100	ANI-16-419_00008	Mouse Cage		7	\$2.00	\$140.00	ARC-16-005	Animal Vendor 1
Animal Housing Facility	100	ANI-16-419_00009	Mouse Cage		7	\$2.00	\$140.00	ARC-16-005	Animal Vendor 1
Animal Housing Facility	100	ANI-16-419_00010	Mouse Cage		7	\$2.00	\$140.00	ARC-16-005	Animal Vendor 1

You can filter your results using the Facility and Room dropdowns at the top of the screen. To use these filters, first select a Facility from the dropdown menu. The Room menu will then populate with rooms from the selected facility. Select a Room, and then click **Find** to narrow down your results.

The table of results contains the following fields:

© iMedRIS Data Corporation

**Facility:** Lists the facility where the cage is located.

**Room:** Lists the room where the cage is located.

**Cage ID:** Lists the unique ID for each cage.

**Cage Type:** Lists the cage type.

**Cage Details:** Click the icon in this column to view a pop-up with details regarding the individual animals in a cage.

Animals in Cage ANI-16-419_00003					
Species	Strain	Animal Id	Tag Number	Sex	Life Status
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00021		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00022		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00023		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00024		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00025		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00026		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00027		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00028		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00029		Male	Alive
Mouse	(Mer-Cre-Mer) Cre	ANI-16-419_M_00030		Male	Alive

**# of Days:** Indicates the number of days included in this particular per diem collection. The number of days represents the days since the last per diem collection.

**Rate:** The per diem rate charged for each cage.

**Cost:** The total amount collected per cage. This is equivalent to the number of days multiplied by the rate multiplied by the number of animals in the cage.

**Order Number:** The order number associated with the procurement of the animals in the cages.

**Vendor:** The vendor from which the animals were received.

Click **Cancel – Return to List** to return to the main Per Diem screen.

## Cage Records

The Cage Records portion of the screen lists the cages associated with the study. At the top of the screen, you can filter your results. Select a **Cage Status**, **Cage Type**, **Facility**, or **Room** using the dropdown menus, or enter all or part of the **Animal ID**, **Animal Tag Number**, or **Bar Code**. Enter information in one or all of the filters and click **Find** to obtain your results.

Account: Jane Investigator, M.D.  
 Site: ADMIN - Redlands  
 Navigation: Home > my studies

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Animal Management** Back

Study Status: Active IACUC Number: IACUC-2016-0612 Study Title: Mouse Study

Submissions Study Management **Animal Management**

Animal Orders  
 Cage Management  
 Per Diem  
 Cage Records  
 Animal Details  
 Animal Breeding  
 Forms

Cage Type: All Facility: All  
 Cage Status: All Room: All  
 Contains Animal ID: Bar Code: Find ...

Cage Records Add a New Cage

1 result(s) found...

Print Card	Delete	Edit	Cage Status	Cage ID	Cage Type	Facility	Room	Number of Males	Number of Females	Number of Unknown	Bar Code
			Active	IACUC-2016-0612_00002	Mouse Cage	Animal Housing Facility	101	5	0	0	0000003507_00002

In the table of Cage Records, you can view the Cage Status, Cage ID, Cage Type, Facility, Room, Number of Males, Number of Females, Number of Unknown, and Bar Code for each cage.

You can also print cage cards from this screen. To print cage cards for every cage on the study, click Print All in the Print Card column. First, you will need to select a template from the dropdown list. Then, click **Generate Cards** to create your cage cards.

Protocol nickname: Application for Animal Research  
 PI: Investigator, Susan

**Animal Management** Back

Study Status: Pending - Submitted for Initial Review Study Title: Application for Animal Research

Submissions Study Management **Animal Management**

Animal Orders  
 Cage Management  
 Per Diem  
 Cage Records  
 Animal Details  
 Animal Breeding  
 Forms

Cage Type: All Facility: All  
 Cage Status: All Room: All  
 Contains Animal ID: Bar Code: Find ...

Cage Records Add a New Cage

38 result(s) found...

**Cage Card:**


Select Template: --none--  
 Cage Card Template

Generate Cards

Print Card	Delete	Edit	Cage	Room	Number of Males	Number of Females	Bar Code
			Retired	120	5	5	0000003196_00014
			Active	120	5	5	0000003196_00015
			Active	120	5	5	0000003196_00016
			Active	120	5	5	0000003196_00017

All of the cage cards for the study will generate and you will be able to print them. You can also generate cage cards for individual cages by clicking on the icons in the Print Card column.

Click the icon in the Delete column to delete a cage. New cages can be deleted when they do not have any animals added yet.

Click the  icon in the Edit column to view and/or edit the details for a cage.

The Cage Management screen contains the following information:

**Cage ID:** The unique identifier for the cage.

**Cage Status:** Select between Active, Quarantine, and Retired. If you would like to set the status to all of the animals in the cage as “Euthanized,” click the **Animals have been euthanized** button.

**Cage Type:** Select from a dropdown menu of Cage Types, configured under Review Board Administration > Setup Cage Types.

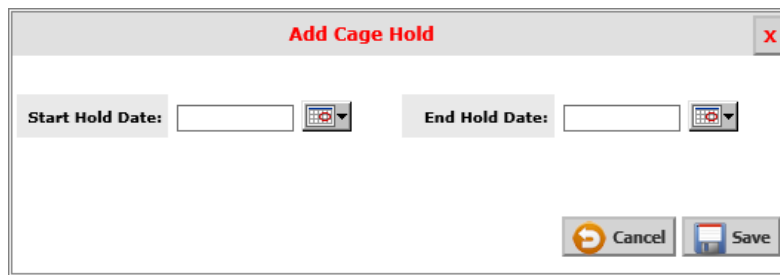
**Facility:** Select from a dropdown menu of Facilities, configured under Review Board Administration > Setup Facilities/Floors/Rooms.

**Floor:** Select from a dropdown menu of Floors, configured under Review Board Administration > Setup Facilities/Floors/Rooms.

**Room:** Select from a dropdown menu of Rooms, configured under Review Board Administration > Setup Facilities/Floors Rooms.

**Activation Date:** This is an editable date field.

**Hold:** Click the **Add Hold** button to place a hold on the cage. Having a hold on the cage will prevent per diem from being collected on those dates. In the Add Cage Hold window, select a Start Hold Date and an End Hold Date and click **Save** to proceed. Click **Cancel** to return without saving.



**Retired Date:** This is an editable date field that will become required if you set the Cage Status to “Retired.”

**Last Date Per Diem Collected:** This read-only field indicates the last time the per diem was collected for this cage.

**Comments:** This is a text field where you can add comments about the cage.

At the bottom of the screen are the Animal Records associated with the cage, which consist of an individual record for each animal currently associated with the cage. In the table of animal records, you can see the Life Status, Species, Strain, Animal ID, Tag Number, Sex, DOB, Facility, Room, Cage ID, the means through which the animal was received, and the Order Number. For more information about editing animal records, please see the Animal Details section of this manual.

Click **Cancel – Return to List** to return to the main Cage Records screen.

Click **Add a New Cage** to open the Cage Management screen and add a new cage to the study.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Mouse Study - Cage Management** Back

Study Status: Active IACUC Number: IACUC-2016-0612 Study Title: Mouse Study

Cancel - Return to List Save

Cage ID: <Generated on Save >

\*Cage Status:  Active  Quarantine  Retired

\*Cage Type: --none--

\*Facility: --none--

Floor: --none--

\*Room: --none--

\*Activation Date:

Hold: Add hold Delete Start Hold End Hold  
 12/19/2016 12/26/2016

\*Retired Date:

\*Last Date Per Diem Collected:

Comments

Animal Records

Adding a new cage requires filling in the same data values described above. The Cage ID will be generated when the cage details have been entered, and the form is saved by clicking **Save**.

At this point, there will be no records listed in the Animal Records at the bottom of the screen, because no animals have been added to the cage yet. Click **Cancel – Return to List** to return to the main Cage Records screen.

## Animal Details

## Animal Records

This screen displays individual records for all of the animals that have been added to the study.

Protocol nickname: Application for Animal Research  
 PI: Investigator, Susan

**Animal Management** Back

Study Status: Pending - Submitted for Initial Review Study Title: Application for Animal Research

Submissions Study Management **Animal Management**

Animal Orders  
 Cage Management  
 Animal Details  
 Animal Records  
 Animal Breeding  
 Forms

Species: All Strain: All Sex: All Life Status: All Date of Birth Range: Generation: All Facility: All Room: All Cage ID: All Animal ID: Animal Tag Number: Origin: All

Find ...

Animal Records


100 result(s) found...

Edit	Life Status	Species	Strain	Animal ID Tag Number	Sex	DOB	Facility Room	Cage ID	Animal received by
	Alive	Mouse	(Mer-Cre-Mer) Cre	ANI-16-483_F_00001	Female		Fac 001 120	ANI-16-483_00003	Order
	Alive	Mouse	(Mer-Cre-Mer) Cre	ANI-16-483_F_00002	Female		Fac 001 120	ANI-16-483_00003	Order
	Alive	Mouse	(Mer-Cre-Mer) Cre	ANI-16-483_F_00003	Female		Fac 001 120	ANI-16-483_00003	Order
	Alive	Mouse	(Mer-Cre-Mer) Cre	ANI-16-483_F_00004	Female		Fac 001 120	ANI-16-483_00003	Order
	Alive	Mouse	(Mer-Cre-Mer) Cre	ANI-16-483_F_00005	Female		Fac 001 120	ANI-16-483_00003	Order
	Alive	Mouse	(Mer-Cre-Mer) Cre	ANI-16-483_F_00006	Female		Fac 001 120	ANI-16-483_00003	Order

At the top of the screen are a series of filters that allow you to narrow down the list of animal records. You can select a **Species, Strain, Sex, Life Status, Generation, Facility, Room, Origin,** or **Cage ID** from the dropdown menus, or enter all or part of the **Animal ID** or **Animal Tag Number**. You can also add two dates in the **Date of Birth Range** fields to search for animals born within a given date range. Enter information in one or all of the filters and click **Find** to narrow down your results.

For example, selecting “Male” from the Sex menu and clicking **Find** will display only the male animals in the list at the bottom of the screen.

Each animal is listed with their Life Status, Species, Strain, Animal ID (an automatically generated number – ANI-16-483\_M\_0026 – that contains the study number [ANI-16-483\_M\_00026], the sex of the animal [ANI-16-483\_M\_0026], and the animal’s unique ID on the study [ANI-16-483\_M\_0026]), Tag Number, Sex, DOB, Facility/Room, Cage ID, and Animal received by (Order, Transfer, Breeding).

Clicking the  icon next to an animal’s record brings you to the Animal Management screen. On the left-hand side of the screen are four links, Animal Profile, Genotype, Scheduling, and Observations.

## Animal Profile

The Animal Profile tab allows you to see and edit information regarding a specific animal. Depending on the animal’s Life Status, this page may be read-only.

Protocol nickname: Application for Animal Research  
PI: Investigator, Susan

Application for Animal Research - Animal Management

Study Status: Pending - Submitted for Initial Review

Study Title: Application for Animal Research

Cancel - Return to List Save

Animal Records

Animal Profile - ANI-16-483\_F\_00001

Species: Mouse

Strain: (Mer-Cre-Mer) Cre

Animal ID: ANI-16-483\_F\_00001

Tag Number:

Animal Alias:

Breeding #: <None Selected> [Select a Breeding Record](#)

Generation: --none--

\* Date of Birth:

\* Sex:  Male  Female  Unknown

\* Life Status: Alive

\* Breeding Status:  Breeding  Retired Breeder  Unknown  Virgin

\* Cage ID: ANI-16-483\_00003 [Select a Cage](#) [Create a New Cage](#)

Coat Color: --none--

Diet: --none--

Animal received by: Order

The tab contains the following data values:

**Species:** A predefined field listing the animal’s species.

**Strain:** This pull-down menu contains all of the strains approved for the study.

**Tag Number:** This is an editable text field.

**Animal Alias:** This is an editable text field.

**Breeding #:** If the animal was bred on the study, a value may already appear here associating the animal to a breeding record. You can also use the **Select a Breeding Record** button to associate the animal to a breeding record on the study. Select a record from the dropdown list, and click **Apply Selection** to save or **Cancel** to return without saving.

**Generation:** This pull-down menu contains a list of generations, configured under Review Board Administration > Setup Generation.

**Date of Birth:** This is an editable date field.

**Sex:** In this field, you can select between Male, Female, and Unknown.

**Life Status:** This pull-down menu contains a list of life statuses, configured under Review Board Administration > Setup Life Status.

**Deactivation Date:** This is an editable date field where you can indicate when the animal is no longer active and will no longer be counted in per diem calculations, if per diem is being calculated per animal.

**Breeding Status:** In this field, you can select between Breeding, Retired Breeder, Unknown, and Virgin.

**Cage ID:** Lists the cage where the animal is currently being housed. Click **Select a Cage** to choose a new cage from among the current cages on the study. Select a cage from the dropdown list, and click **Apply Selection** to proceed.

Select a Cage:
X

Select a Cage from the List used on this Study:

Cage Details

<b>Facility:</b>	Animal Housing Facility
<b>Room:</b>	101
<b>Number of Males:</b>	0
<b>Number of Females:</b>	4
<b>Bar Code:</b>	0000003507_00004
<b>Comments:</b>	<div style="border: 1px solid gray; height: 30px; width: 100%;"></div>

Click **Create a New Cage** to configure a new cage for the study.

Select a New Cage:
X

<b>*Cage Type:</b>	<input style="width: 100%;" type="text" value="Mouse Cage"/>
<b>*Facility:</b>	<input style="width: 100%;" type="text" value="Fac 001"/>
<b>Floor:</b>	<input style="width: 100%;" type="text" value="2"/>
<b>*Room:</b>	<input style="width: 100%;" type="text" value="120"/>
<b>Comments:</b>	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>

Enter the details for the cage, and click **Apply Selection** to add the cage to the study and add the mouse to the cage.

**Coat Color:** This pull-down menu contains a list of coat colors, configurable under Review Board Administration > Setup Coat Color.

**Diet:** This pull-down menu contains a list of diets, configurable under Review Board Administration > Setup Diet.

**Animal received by:** This read-only field tells you the way the animal was added to the study (Order, Transfer, or Breeding).

**Order Number:** This read-only field gives the order number associated with the animal.

Click **Save** to save the information you have entered, or click **Cancel – Return to List** to return to the main Animal Records screen.

### Genotype

The Genotype tab allows you to enter information regarding the animal’s genotype. Click **Add a New Genotype** to open the Animal Genotyping screen. On this screen, there are fields to enter a Gene, First Allele, First Confidence, Second Allele, Second Confidence, Genotype Date, and Comments. The Gene, First Allele, and Second Allele pull-down menus are configured under Review Board Administration > Setup Gene and Setup Allele.

Click **Save Genotyping** to save the record and **Cancel – Return to List** to return to the Genotype tab, or just hit **Cancel – Return to List** to return without saving.

Delete	Edit	View Details	Gene	First Allele	First Confidence	Second Allele	Second Confidence	Genotype Date
			18	b-1	Yes	b-1	Yes	12/27/2016

To delete a genotype that you have added, click the icon in the Delete column.

### Scheduling

On the Scheduling tab, you can add treatment plans and schedule tasks for the animal.

#### Configuring Treatment Plans

Treatment plans are configured on the Study Management tab > Finance Setup > Construct Animal Treatment Plan. Clicking this link opens the Study Animal Treatment Plan List screen.

Protocol nickname: Application for Animal Research  
 PI: Investigator, Susan

### Study Animal Treatment Plan List

Back

Study Status: **Approved**      Study Title: Application for Animal Research

+ Add a New Animal Treatment Plan

Delete	Edit	Show Comments	Species Name	Plan Name	Date Created	Copy
			Mouse	Treatment Plan	04/28/2016	

To add a new treatment plan, click the **Add a New Animal Treatment Plan** button. The Add a New Animal Plan window will allow you to add the Template (plan) name and any Comments. The Species Name will appear as read-only if there is only one approved species on your study, or as a dropdown menu if there are multiple species available.

### Add a New Animal Plan

\*Template Name:

\*Species Name:
Mouse

Comments:

↑  
↓

Enter the information about the new plan and click **Save Template** to proceed. On the Study Animal Treatment Plan screen, you can configure the treatment plan by adding tasks. If you wish, you can add Comments about the plan in the text box near the top of the screen. You can also click **Cancel – Return to List** to stop creating the plan and return to the main list of treatment plans.

Protocol nickname: Application for Animal Research  
 PI: Investigator, Susan

**Study Animal Treatment Plan** Back

Study Status: **Approved** Study Title: Application for Animal Research

Cancel- Return to list
Add Tasks
Save Animal Treatment Plan

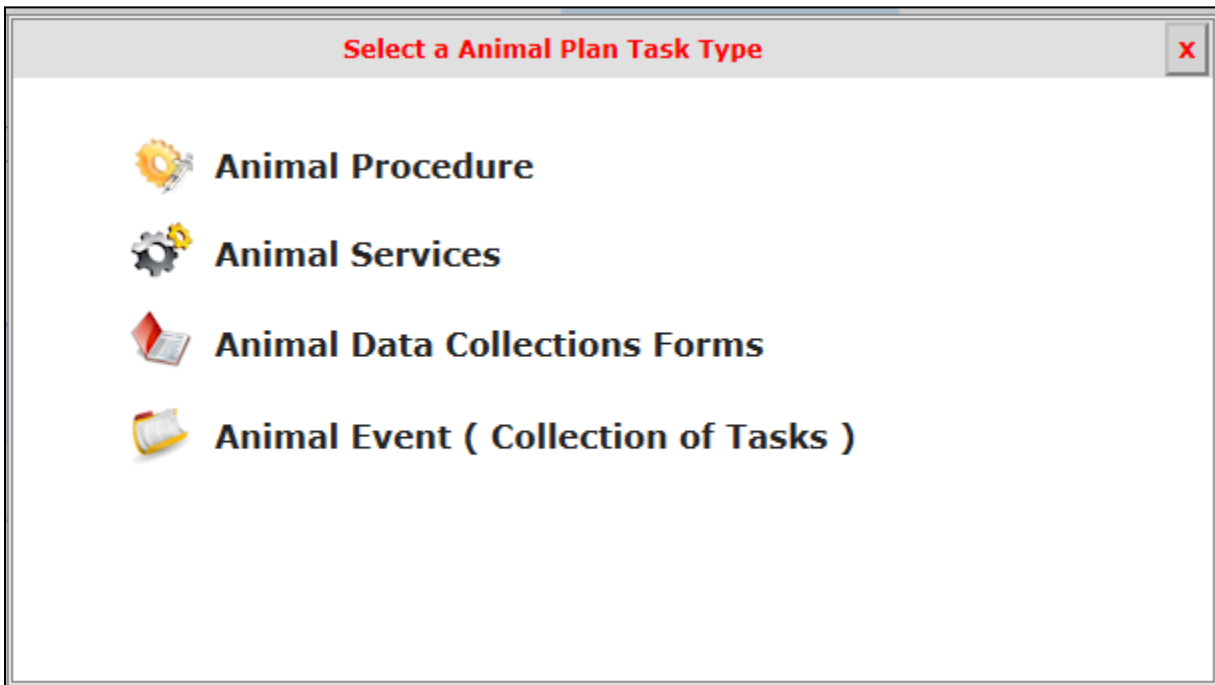
\*Plan Name: Animal Treatment Plan

Species Name: Mouse

Comments:

Delete	Add SubTask	View Details	*Task Name	*Offset	Account Number
No task have been added to the template.					


Click **Add Tasks** to continue. This will open a window where you can select a task type. You can choose between Animal Procedure, Animal Services, Animal Data Collection Forms, and an Animal Event (Collection of Tasks).







**Animal Procedure**


In order for Animal Procedures to appear for selection, they must have been submitted to the board via the study application and approved. Animal Procedures are configured under ARC Assistant > Review Board Administration > List Maintenance Setup > Animal Procedure Configuration List. For more information about configuring procedures, please see the ARC – Review Board Administration manual.


Add Animal Plan Task Type
X


Animal Procedures

Select	Species	Is USDA Species	Procedure Type	Procedure Name
	Mouse			Behavior Testing
	Mouse		Treatment	Imaging
	Mouse			Tail biopsy for genotype

 Back to Task Selection
 

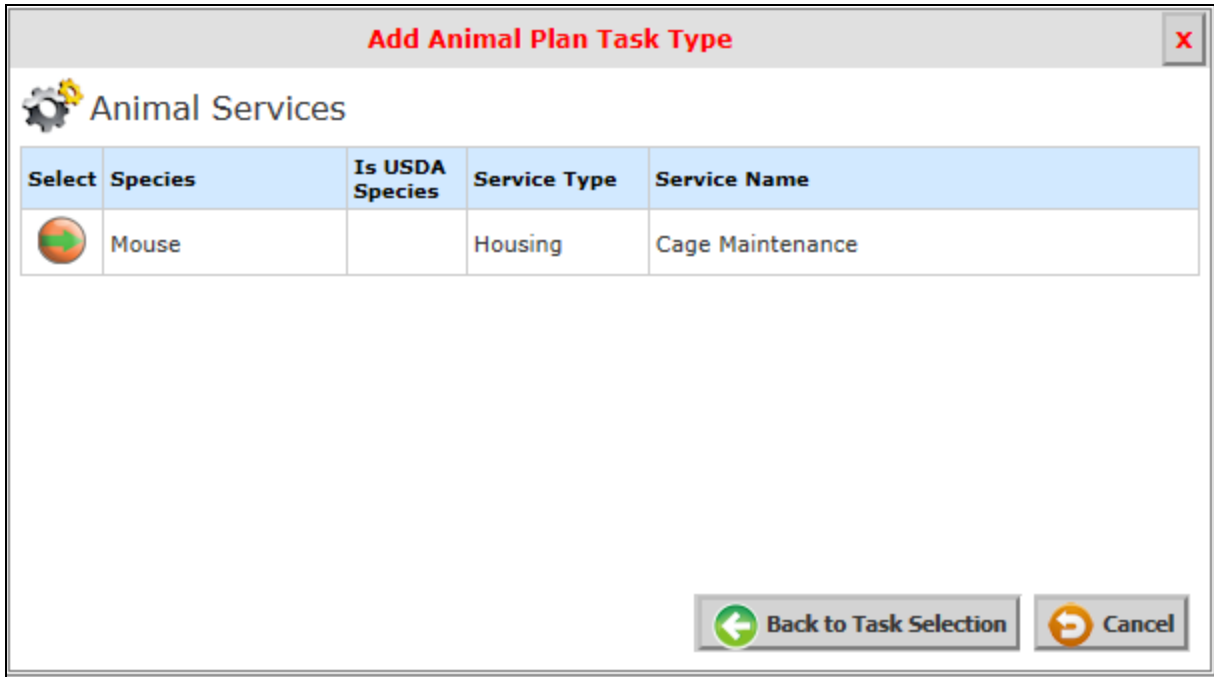
 Cancel

Click the  icon next to a procedure to select it to add to the treatment plan and return to the main treatment plan screen. Click **Back to Task Selection** to return to the previous menu, or **Cancel** to return to the main screen without selecting a procedure.

### Animal Services

Animal Services are configured under ARC Assistant > Review Board Administration > List Maintenance Setup > Animal Service Configuration List. For more information about configuring animal services, please see the ARC – Review Board Administration manual.

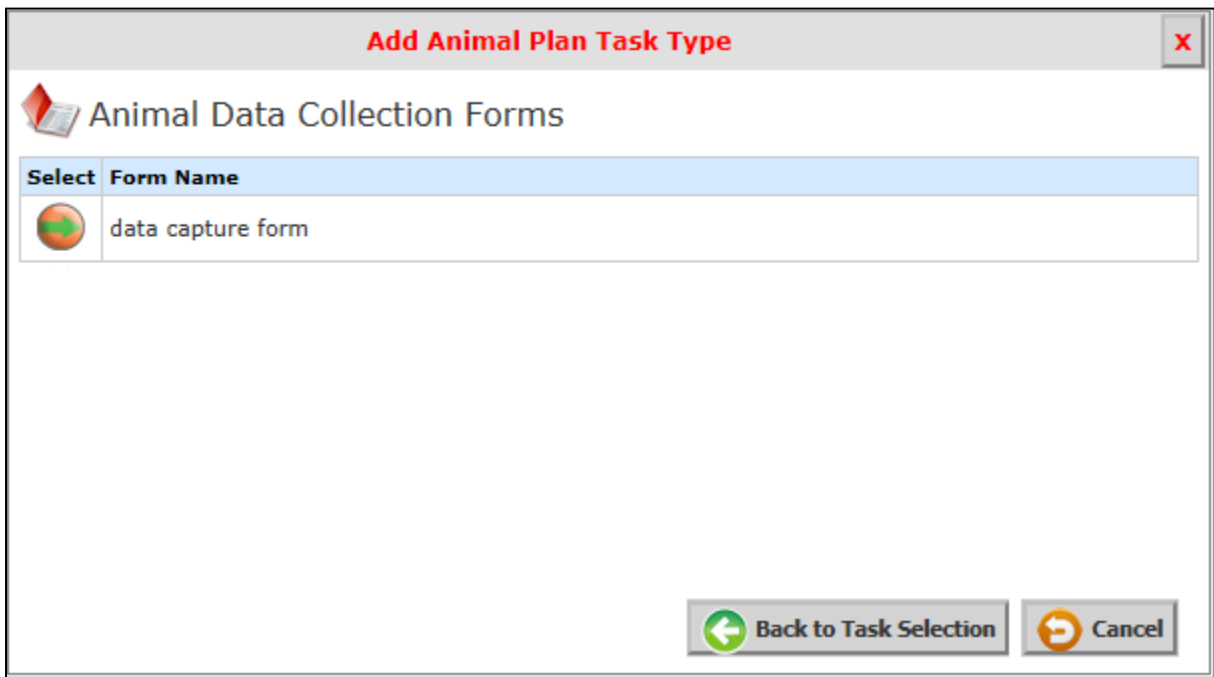
The services that appear in the Add Animal Plan Task Type window are all of the services associated with the species that you have assigned to your treatment plan.




Click the icon next to a service to select it to add to the treatment plan and return to the main treatment plan screen. Click **Back to Task Selection** to return to the previous menu, or **Cancel** to return to the main screen without selecting a service.

**Animal Data Collection Forms**

Here, you can add forms for data collection to the treatment plan. The forms that appear here are those designated as “All Subject on all Study CRF/Data Capture Form” in System Form Designer.



Click the  icon next to a form to select it to add to the treatment plan and return to the main treatment plan screen. Click **Back to Task Selection** to return to the previous menu, or **Cancel** to return to the main screen without selecting a form.


**Animal Event (Collection of Tasks)**

An Animal Event is a means to group a selection of tasks together from the Animal Procedure, Animal Services, and Animal Data Collection Forms categories.


Add Animal Plan Task Type X

**\*Task Name:**


**Description:**

 **Animal Procedure**


Select	Species	Is USDA Species	Procedure Type	Procedure Name
<input type="checkbox"/>	Mouse			Behavior Testing
<input type="checkbox"/>	Mouse		Treatment	Imaging
<input type="checkbox"/>	Mouse			Tail biopsy for genotype


 **Animal Services**


Select	Species	Is USDA Species	Procedure Type	Procedure Name
<input type="checkbox"/>	Mouse		Housing	Cage Maintenance

 **Animal Data Collection Forms**

Select	Form Name
<input type="checkbox"/>	data capture form


Back to Task Selection


Cancel



Create Event Task


First, enter a Task Name and a Description, if desired. Next, you can check boxes next to the procedures, services, and forms you wish to include in your Animal Event. Click Create Event Task to Click **Back to Task Selection** to return to the previous menu, or **Cancel** to return to the main screen without creating the event.


On the main Study Animal Treatment Plan screen, you will see a list of the tasks you have selected to include in the treatment plan.

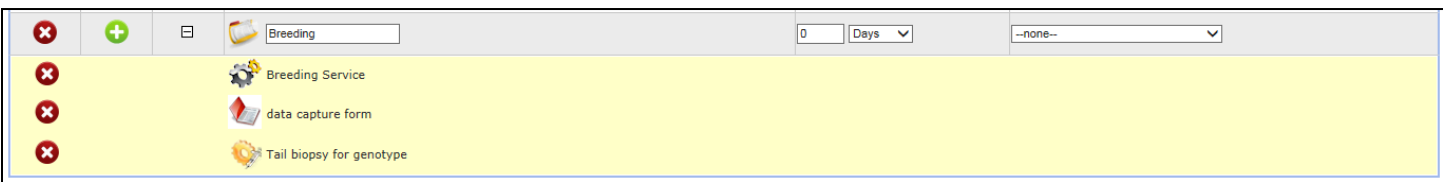


The table of tasks contains the following fields:

**Delete:** Click the  icon in this column to delete a task.

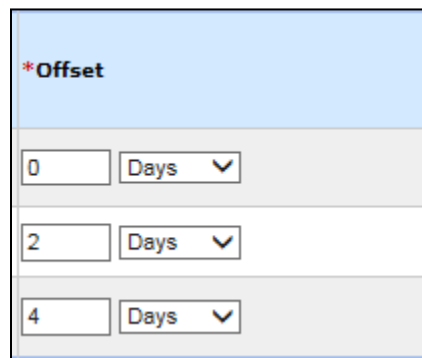
**Add Sub Task:** This column is applicable to Animal Events. You can click the  icon to add more tasks to an Animal Event.

**View Details:** This column is also applicable to Animal Events. You can click the  icon to expand the list of tasks associated with an event.



**Task Name:** This field contains the name of the task. The names of Animal Events are editable in this field.

**Offset:** Enter a value here to offset tasks from the start of the treatment plan. For example, an offset of two days means that the task will be scheduled to take place two days after the treatment plan begins. Enter a numeric value in the first box, and then select a time frame (Days, Weeks, Months) from the dropdown menu.



**Account Number:** Select the account number to which you would like to bill a task. Account Numbers are configured under Study Management > Finance Setup > Study Accounts.

When you are finished adding tasks, click **Save Animal Treatment Plan**. The treatment plan will now be available to add to an animal’s schedule.

**Adding Treatment Plans/Tasks to the Schedule**

On the Scheduling tab, you can add Treatment Plans and Schedule tasks to an animals’ schedule.

Protocol nickname: Application for Animal Research  
 PI: Investigator, Susan  
**Application for Animal Research - Animal Management** Back

Study Status: **Approved** Study Title: Application for Animal Research

Cancel - Return to List Add Treatment Plan Add a New Schedule Task

**Animal Records** Scheduling - ANI-16-483\_F\_00142

Animal Profile  
 Genotype  
**Scheduling**  
 Observations

Incomplete		Complete				
Delete	Open	Details	Task Name	Task Description	Target Date	
			Behavior Testing	null	05/04/2016	
			Cage Maintenance	null	05/06/2016	
			Breeding Event		05/08/2016	

Click **Add Treatment Plan** to add a treatment plan to the animal’s schedule. In the Add Treatment Plan window, type in a date in the Treatment Plan Start Date field in the DD/MM/YYYY format, or click the icon to pick a date from the calendar. To select a plan and add it to the schedule, click the icon next to a plan in the Apply Plan column.

**Add Treatment Plan** X


\*Treatment Plan Start Date: 05/04/2016











\*Plan Selection:

Apply Plan	Plan Name	Plan Comments
	Treatment Plan	

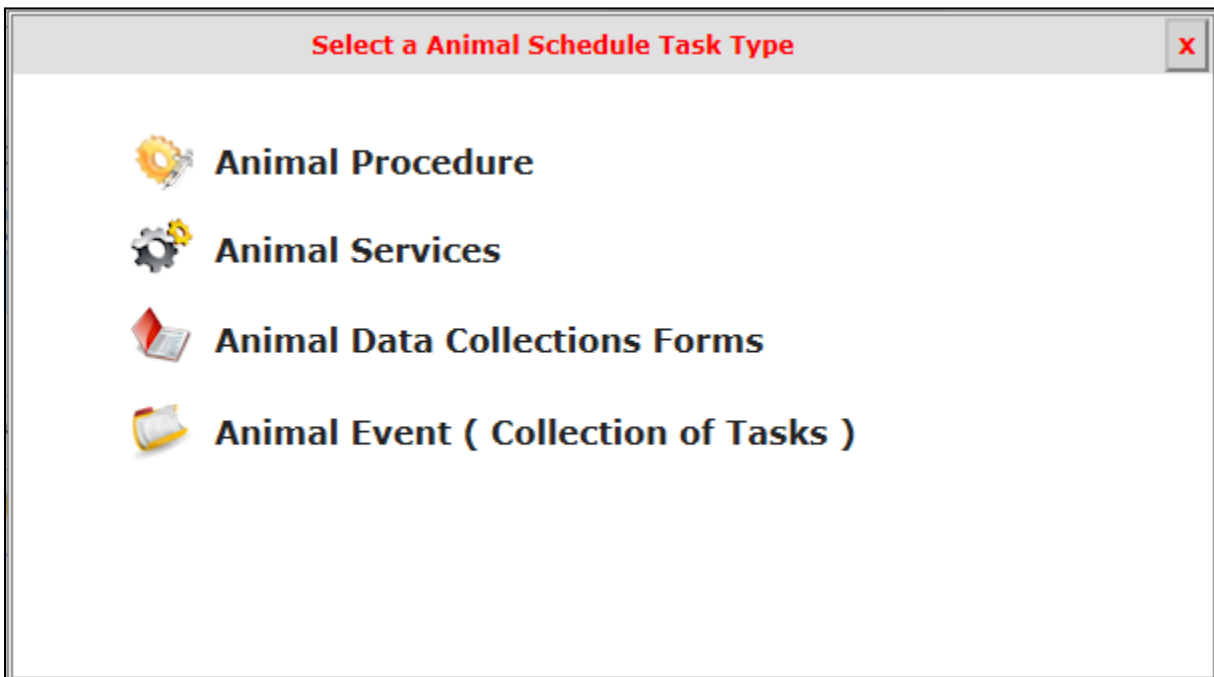
Cancel

Click **Cancel** if you wish to return to the main Scheduling screen without adding a treatment plan.

When a treatment plan has been added, its component tasks will appear under the Incomplete tab as individual tasks. You can click the  icon in the Delete column to delete the individual tasks associated with the treatment plan, if needed.

Scheduling - ANI-16-483_F_00142						
Incomplete			Complete			
Delete	Open	Details	Task Name	Task Description	Target Date	
			 Behavior Testing	null	05/04/2016	
			 Cage Maintenance	null	05/06/2016	
			 Breeding Event		05/08/2016	

Click **Add a New Schedule Task** to add tasks individually. In the Select an Animal Schedule Task Type window, you can choose between an Animal Procedure, Animal Services, Animal Data Collection Forms, or Animal Event (Collection of Tasks). For more information about these types of tasks, please see the previous section of this manual on configuring treatment plans.



After you select the type of task, you will be brought to a window where you can enter the Target Date, select an Account Number, and select the task from the list of available tasks.

**Add Animal Schedule Task** X

**\*Target Date:**

**Account Number:** --none-- ▼

**Animal Procedures**

Select	Species	Is USDA Species	Procedure Type	Procedure Name
	Mouse			Behavior Testing
	Mouse		Treatment	Imaging
	Mouse			Tail biopsy for genotype

Back to Task Selection
 Cancel

Click the icon to select a task, **Back to Task Selection** to return to the list of task types, or **Cancel** to return to the main Scheduling screen. The tasks you add initially appear under the Incomplete tab, which contains the following fields:

**Delete:** Click the icon in this column to delete a scheduled task.

**Open:** Click the icon in this column to open and edit a task.

**Task Name:** This field contains the name of the task.

**Task Description:** This field contains the description of the task as specified when the task is configured under Review Board Administration.

**Target Date:** This is the target date for the task to be completed.

To view and process a task, click the icon in the Open column to open the Animal Scheduling Task screen. On this screen, you can edit the target date, mark a task completed, enter the assessment date, select an account number, and enter comments and observations.

Protocol nickname: Application for Animal Research  
PI: Investigator, Susan

**Animal Scheduling Task** Back

Study Status: **Approved** Study Title: Application for Animal Research

Cancel - Return to List Save Task Details

Schedule Task - ANI-16-483\_F\_00142

Task Name: Behavior Testing  
Classification: Procedure  
Description: null  
Target Date: 05/04/2016  
Completed: Incomplete  
Assessment Date:  
Account Number: --none--

Comments:

+ Add an Observation

Delete	Edit	Observation Date	Observation
No Observations exist for this task.			

The following fields are editable on the Animal Scheduling Task screen:

**Target Date:** In this field, you can enter the target date for the task. Type in a date in a DD/MM/YYYY format, or select a date from the calendar.

**Completed:** This field allows you to change the status of the task. Select from Canceled, Complete, Incomplete, and Not Done. Changing the status of the task to Canceled, Complete, or Not Done moves the task from the Incomplete tab to the Complete tab.

**Assessment Date:** This field is required when you change the status of the task to Canceled, Complete, or Not Done. Type in a date in a DD/MM/YYYY format, or select a date from the calendar. This field cannot be used if the status of the task is Incomplete.

**Account Number:** Here, you can select the billing account number for the task from a dropdown list. Account Numbers are configured under Study Management > Finance Setup > Study Accounts.

**Comments:** In this text editor, enter comments about the task.

At the bottom of the screen, you can enter observations. Click **Add an Observation** to open the Add Observation window. The Observed By field is a read-only field that populates with the name of the user who is entering the observation. The Observation Date field auto-populates with the current date, but is editable. The Problem/Diagnosis, Treatment, and Outcome fields contain dropdown lists that are configured under Review Board Administration > System Setup > Setup Observation Diagnosis/Setup Observation Outcome/Setup Observation Treatment.

You can enter an observation in the text editor and click **Save** to save the observation and return to the previous screen, or click **Cancel** to return to the previous screen without adding an observation.

Add Observation X

**Observed By:** Jane Investigator, M.D.

**\*Observation Date:** 12/27/2016 📅



**Problem/Diagnosis:** --none-- ▼

**Treatment:** --none-- ▼

**Outcome:** --none-- ▼

**\*Observation:**

↶ Cancel 💾 Save

Once an observation has been added, you can use the  icon in the Delete column to delete it, or the  icon in the Edit column to open it for editing.

+ Add an Observation

Delete	Edit	Observation Date	Observed By	Problem/Diagnosis	Treatment	Outcome	Observation
		12/27/2016	Jane Investigator, M.D.	Observation Diagnosis	Observation Treatment	Observation Outcome	Observation

Click **Back** to return to the Scheduling tab.

If you are working with a Data Collection Form task, you will be able to view and complete the form from within the Animal Scheduling Task screen. Click the icon in the Open column for the task.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Animal Scheduling Task**

[Back](#)

Study Status: **Active** IACUC Number : IACUC-2016-0612 Study Title : Mouse Study

[Cancel - Return to List](#) [Save Task Details](#)

**Schedule Task - IACUC-2016-0612\_F\_00012**

<b>Task Name:</b> Data Capture Form	<b>Comments:</b>     
<b>Classification:</b> Form	
<b>Description:</b> Data capture form	
<b>Target Date:</b> 12/27/2016	
<b>Data Capture Form:</b>	
<b>Completed:</b> Incomplete <input type="button" value="v"/>	
<b>Assessment Date:</b> <input type="text"/>	
<b>Account Number:</b> --none-- <input type="button" value="v"/>	

[+ Add an Observation](#)

Between the Target Date and Completed fields, you will see a link to the Data Capture Form. Click the icon to open the form and complete it, if desired.

You can click **Cancel – Return to List** at any time to return to the main Scheduling screen without saving, or click **Save Task Details** to save your edits. Tasks with the status Cancelled, Complete, or Not Done become read-only after saving.

After saving, click **Back** to return to the main Scheduling screen. You can click over to the Complete tab to view all of the Canceled, Complete, and Not Done tasks.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Mouse Study - Animal Management**

[Back](#)

Study Status: **Active** IACUC Number : IACUC-2016-0612 Study Title : Mouse Study

[Cancel - Return to List](#)

Animal Records		Scheduling - IACUC-2016-0612_F_00012					
Animal Profile	<input type="button" value="v"/>	<b>Incomplete</b>		<b>Complete</b>			
Genotype	<input type="button" value="v"/>	<b>Open</b>	<b>Details</b>	<b>Task Name</b>	<b>Task Description</b>	<b>Target Date</b>	<b>Assessment Date</b>
Scheduling	<input type="button" value="v"/>			Data Capture Form	Data capture form	12/27/2016	12/27/2016
Observations	<input type="button" value="v"/>						

Click the icon in the Open column to view the details of a task. The task will be read-only.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D. **Animal Scheduling Task** Back

Study Status: **Active** IACUC Number : IACUC-2016-0612 Study Title : Mouse Study

Cancel - Return to List

**Schedule Task - IACUC-2016-0612\_F\_00012**

<b>Task Name:</b>	Data Capture Form	<b>Comments:</b>
<b>Classification:</b>	Form	
<b>Description:</b>	Data capture form	
<b>Target Date:</b>	12/27/2016	
<b>Data Capture Form:</b>		
<b>Completed:</b>	Complete	
<b>Assessment Date:</b>	12/27/2016	
<b>Account Number:</b>		

Observation Date	Observed By	Problem/Diagnosis	Treatment	Outcome	Observation
No Observations exist for this task.					

Click **Cancel – Return to List** to return to the main Scheduling screen.

### Observations

This tab allows you to add observations about the animal. Click **Add a New Observation** to open the Add Observation window.

The Observation Date field is auto-populated with the current date but can be edited. If necessary, enter the Problem/Diagnosis, Treatment, and Outcome as described earlier. Enter your data in the Observation field and click **Save** to close the window and return to the Observations tab. The observation will be added to the main screen.

Animal Records							
Observation - IACUC-2016-0612_F_00012							
Delete	Edit	Observation Date	Observed By	Problem/Diagnosis	Treatment	Outcome	Observation
		12/27/2016	Jane Investigator, M.D.	Observation Diagnosis	Observation Treatment	Observation Outcome	Observation
		12/27/2016	Jane Investigator, M.D.				Observation 2

Click the icon in the Delete column if you wish to delete an observation. Clicking **Cancel – Return to List** will return you to the main Animal Records screen.

## Animal Breeding

From this tab, you can manage animal mating and breeding records

### Mating Records

To search for an existing mating record, there are several filters you can use at the top of this tab.

Dam Animal ID: <input type="text"/>	Facility: <input type="text" value="All"/>	<input type="button" value="Find ..."/>
Dam Animal Tag Number: <input type="text"/>	Room: <input type="text" value="All"/>	
Sire Animal ID: <input type="text"/>	Cage ID: <input type="text" value="All"/>	
Sire Animal Tag Number: <input type="text"/>	Mating Date: <input type="text"/> - <input type="text"/>	
Litter Species: <input type="text" value="Mouse"/>	Generation: <input type="text" value="All"/>	
Litter Strain: <input type="text" value="(Mer-Cre-Mer) Cre"/>	Needs Genotyping?: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="Clear"/>	

You can enter the Dam Animal ID, Dam Animal Tag Number, Sire Animal ID, Sire Animal Tag Number, Litter Species, Litter Strain, Facility, Room, Cage ID, Mating Date range, Generation, and Needs Genotyping. After entering information, click **Find** to return the corresponding results.

Click **Add a New Mating Record** to open the Animal Mating screen.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Mouse Study - Animal Mating** Back

Study Status: Active    IACUC Number: IACUC-2016-0612    Study Title: Mouse Study

Cancel - Return to List    Save

\* Species Name: Mouse

Mating ID: <Generated on Save >

\* Sire ID:

\* Dam 1 ID:

New Mating Diet: --none--

\* Breeding Strain: --none--

\* Litter Generation: --none--

\* Mating Date:

\* Standard Wean Time:  Standard  Extended

Needs Genotyping?:

\* Cage ID:

Wean Notes:

The Animal Mating screen contains the following fields:

**Species Name:** If there is more than one species approved for the study, this will be a dropdown list. If only one species is approved, the name of the species will be read only.

**Mating ID:** This will be a unique number that will be generated when the form is saved.

**Sire ID:** Click **Select Sire** to bring up a list of all the male animals on the study. If you would like to filter the search results to locate a specific animal, you can use the Strain, Life Status, Date of Birth range, Generation, Animal ID, Animal Tag Number, Animal Alias, and Cage ID filters. After entering in your filter information, click **Find**.

Select an Animal: X

Species: Mouse Strain: <input type="text" value="All"/> Life Status: <input type="text" value="All"/> Date of Birth: <input type="text"/> - <input type="text"/> Generation: <input type="text" value="All"/>	Sex: Male Animal ID: <input type="text"/> Animal Tag Number: <input type="text"/> Animal Alias: <input type="text"/> Cage ID: <input type="text" value="All"/>	<input type="button" value="Find ..."/>
---	--	---

15 result(s) found...

Select	Species	Strain	Animal ID Tag Number	Sex	DOB	Life Status	Facility Room	Cage ID
<input type="radio"/>	Mouse	(Mer-Cre-Mer) Cre	IACUC-2016-0612_M_00009	Male		Euthanized	Animal Housing Facility 101	IACUC-2016-0612_00003
<input type="radio"/>	Mouse	(Mer-Cre-Mer) Cre	IACUC-2016-0612_M_00010	Male		Euthanized	Animal Housing Facility 101	IACUC-2016-0612_00003
<input type="radio"/>	Mouse	(Mer-Cre-Mer) Cre	IACUC-2016-0612_M_00016	Male		Alive	Animal Housing Facility 100	IACUC-2016-0612_00008
<input type="radio"/>	Mouse	(Mer-Cre-Mer) Cre	IACUC-2016-0612_M_00017	Male		Alive	Animal Housing Facility 101	IACUC-2016-0612_00007
<input type="radio"/>	Mouse	(Mer-Cre-Mer) Cre	IACUC-2016-0612_M_00018	Male		Alive	Animal Housing Facility 101	IACUC-2016-0612_00007
<input type="radio"/>	Mouse	(Mer-Cre-Mer) Cre	IACUC-2016-0612_M_00019	Male		Alive	Animal Housing Facility 101	IACUC-2016-0612_00007
<input type="radio"/>	Mouse	(Mer-Cre-Mer) Cre	IACUC-2016-0612_M_00020	Male		Alive	Animal Housing Facility 101	IACUC-2016-0612_00007

To select an animal, click the radio button associated with the record in the Select column. Click **Apply Selection** to add the animal to the mating record, or **Cancel** to exit without selecting an animal.

**Dam 1 ID:** Click **Select Dam** to bring up a list of all the female animals on the study. The process for selecting a dam is the same as described above for selecting a sire.

**New Mating Diet:** Select a diet from the dropdown list.

**Breeding Strain:** The available strains on the study will populate in this dropdown list.

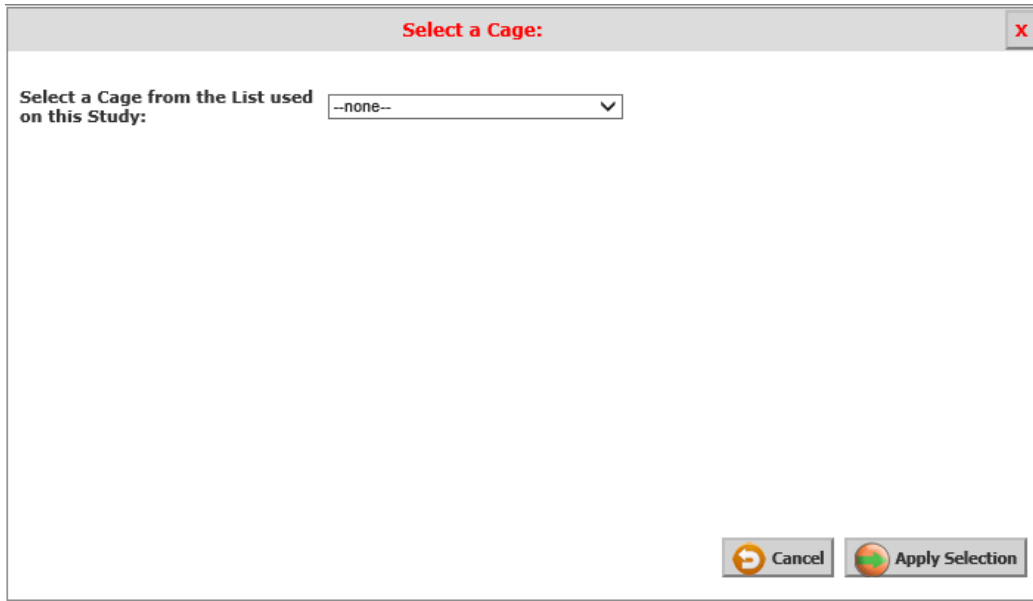
**Litter Generation:** Select a generation from the dropdown list.

**Mating Date:** This is a selectable date field.

**Standard Wean Time:** Select from between Standard and Extended.

**Needs Genotyping?:** Select this checkbox if the mating record needs genotyping.

**Cage ID:** You can either select an existing cage from the study or create a new cage. Click **Select a Cage** to choose an existing cage.



Select a cage from the dropdown menu, and click **Apply Selection**. To return without selecting a cage, click **Cancel**.

To create a new cage, click the **Create a New Cage** button. In the pop-up window, you will be prompted to select a Cage Type, Facility, Floor, Room, Activation Date, and enter any comments if necessary. Click **Apply Selection** to create the cage, or **Cancel** to return.

**Wean Notes:** Add any notes in this text field.

**Comments:** Add any comments in this text field.

Click **Save** to save the mating record, or **Cancel – Return to List** to return to the main screen without saving. After saving, click **Back** to return to the Mating Records tab. The new record you created will appear in the list of results.

Study Mating List <span style="float: right;">+ Add a New Mating Record</span>										
2 result(s) found...										
Edit	Species	Dam Animal ID	Sire Animal ID	Mating ID	Mating Date	Facility	Cage ID	Litter Strain	Generation	Needs Genotyping?
		Tag Number	Tag Number			Room				
	Mouse	IACUC-2016-0612_F_00012	IACUC-2016-0612_M_00016	001	12/27/2016	Animal Housing Facility 100	IACUC-2016-0612_00008	(Mer-Cre-Mer) Cre	AAA	No
	Mouse	IACUC-2016-0612_F_00013	IACUC-2016-0612_M_00016	002	12/27/2016	Animal Housing Facility 101	IACUC-2016-0612_00004	(Mer-Cre-Mer) Cre	N09	No

## Breeding Records

Once you have created mating records for the study, you can generate breeding records to manage the new animals that have been born. To locate existing breeding records, you can use the filters at the top of this tab. Select a Mating ID, Breeding Type, or Date Born, Wean Date, or Tag Date date range. Click **Find** to narrow down your results.

Mating ID: All	Date Born: [ ] - [ ]	Find ...
Breeding Type: All	Wean Date: [ ] - [ ]	
	Tag Date: [ ] - [ ]	

To add a new breeding record, click the **Add a New Breeding Record** button.

Protocol nickname 2: Mouse Study  
 PI: Investigator, Jane, M.D.

**Mouse Study - Animal Breeding** Back

Study Status: Active    IACUC Number: IACUC-2016-0612    Study Title: Mouse Study

Cancel - Return to List    Save

**Breeding Number:** <Generated on Save >

\* Mating ID: --none--

\* Total Born #: [ ]

\* # Males / # Females: [ ] / [ ]

\* Breeding Type: --none--

\* Date Born: [ ]

Wean Date: [ ]

Tag Date: [ ]

\* Breeding Status: --none--

Comments: [ ]

**Add offspring into database**

Auto Generate Animal Records:

Leave in Mating Cage:

The fields on the Animal Breeding screen are as follows:

**Breeding Number:** This will be generated when the breeding record is saved.

**Mating ID:** In this dropdown menu, you can select from the mating records that have been created for the study. Once a mating ID has been selected, details about the mating record will populate on the right side of the screen.

<b>Species Name:</b>	Mouse
<b>Mating ID:</b>	001
<b>Sire Animal ID:</b>	IACUC-2016-0612_M_00016
<b>Dam Animal ID:</b>	IACUC-2016-0612_F_00012
<b>Breeding Strain:</b>	(Mer-Cre-Mer) Cre
<b>Litter Generation:</b>	AAA
<b>Mating Date:</b>	12/27/2016
<b>Standard Wean Time:</b>	Standard
<b>* Cage ID:</b>	IACUC-2016-0612_00008
<b>Wean Notes:</b>	

**Total Born #:** Enter the total number of animals born in this field.

**# Males/# Females:** Enter the number of males and females born in the corresponding fields.

**Breeding Type:** Select a value from the dropdown list. The values in this list are configured under Review Board Administration > System Setup > Setup Breeding Type.

**Date Born:** Select a date in this field.

**Wean Date:** Select a date in this field.

**Tag Date:** Select a date in this field.

**Breeding Status:** Select a value from the dropdown menu. The values in this list are configured under Review Board Administration > System Setup > Setup Breeding Status.

**Comments:** Enter any necessary comments in this text field.

### Add Offspring into Database

This section of the Animal Breeding screen allows you to determine whether to generate records for the new animals and where the new animals should be housed.

#### Add offspring into database

Auto Generate Animal Records

Leave in Mating Cage

Number of Cages

#### Approved Location:

* Cage Type:	* Facility:	Floor:	* Room:	* Number of Males:	* Number of Females:	Total:
No Cages have been entered.						

**Auto Generate Animal Records:** Select this checkbox if you wish to automatically create animal records for the new animals. If you deselect this box, the remainder of the screen will not populate and you will not be able to place the animals in cages.

**Leave in Mating Cage:** If you select this option, the new animals will be added to the mating cage and you will not be able to select new cages.

**Number of Cages:** If you wish to place the animals in new cage(s), enter the number of cages here. The Approved Location table will populate with the number of records selected.

**Approved Location:** In this table, enter the Cage Type, Facility, Floor, Room, and Number of Males and Number of Females in each new cage. Click the **All** button at the top of a column to enter the same information for all the records. The number of males and number of females must equal the number of males and females added at the top of the screen or the page will not save.

Click **Back** to return to the main Breeding Records screen. The new breeding record you just added will appear in the Study Breeding List, and the new animals will be added to the total on the study.

Study Breeding List <span style="float: right;">+ Add a New Breeding Record</span>										
1 result(s) found...										
Edit	Mating ID	Breeding ID	Breeding Type	Date Born	Wean Date	Tag Date	Number of Males	Number of Females	Total Born	Offspring Added?
	001	001	Live Birth	12/27/2016			5	5	10	Yes

## Forms

From this tab, you can fill out forms for submission to the ARC review board. The forms listed on this screen are those categorized in System Form Designer as Animal Resource Center Submission Forms that have the correct access granted.

To start a form, click on the form name in the list under ARC Submission Forms. This will bring you to a screen where you can view a list of records associated with that particular form.

Protocol nickname 2: Mouse Study  
PI: Investigator, Jane, M.D.

**Animal Export - Outgoing Only** Back

Study Status: Active    IACUC Number: IACUC-2016-0612    Study Title: Mouse Study

List of records associated with form: Animal Export - Outgoing Only.  
To view previous versions click on the folder icon .

0 result(s) found...

Show Rev	Edit/View	Ref Number	Sub. Rounds	Track Location	Process Submission	Submission Date	Created By	Date Created	Modified By	Date Modified
No records have been created.										

Click **Add a New Form** to begin the process of filling out the form and submitting it to the ARC board. For more information about this screen, please reference the Study Assistant – Study Submissions manual.

Click **Back** to return to the Forms tab. Forms that have yet to be processed by the review board appear under Outstanding Submission(s).

Protocol nickname 2: Mouse Study  
PI: Investigator, Jane, M.D.

**Animal Management** Back

Study Status: Active    IACUC Number: IACUC-2016-0612    Study Title: Mouse Study

Submissions    Study Management    Subject Management    **Animal Management**

Animal Orders	ARC Submission Forms	Open
Cage Management	Animal Export - Outgoing Only	
Animal Details		
Animal Breeding		
Forms		
Animal Resource Center Forms		

Outstanding Submission(s)			
Track Location	Ref Number	Request Type	Process Submission
	005128	Click on the hyperlink to edit/view the submission. <b>Animal Export - Outgoing Only</b>	<a href="#">Retract Submission</a>