



Animal Resource Center

Orders and Billing Processing

Software Version: 11.02.01

Manual Version: P-1

Manual Published: 4/9/2021

Introduction

The Animal Resource Center (ARC) module provides tools for processing and tracking two general types of orders: orders for items related to acquiring and exporting animals, covered in the Orders section of this manual, and orders for items used in the maintenance of those populations, covered in the Material Orders section of this manual.

The primary difference between the two types of order is that iRIS™ pages and forms used for processing material orders do not include fields specific to animal orders, such as species, genotype, age, cage details and breeding status. Providing two different types of ordering allows for streamlining system pages and forms used in material ordering.

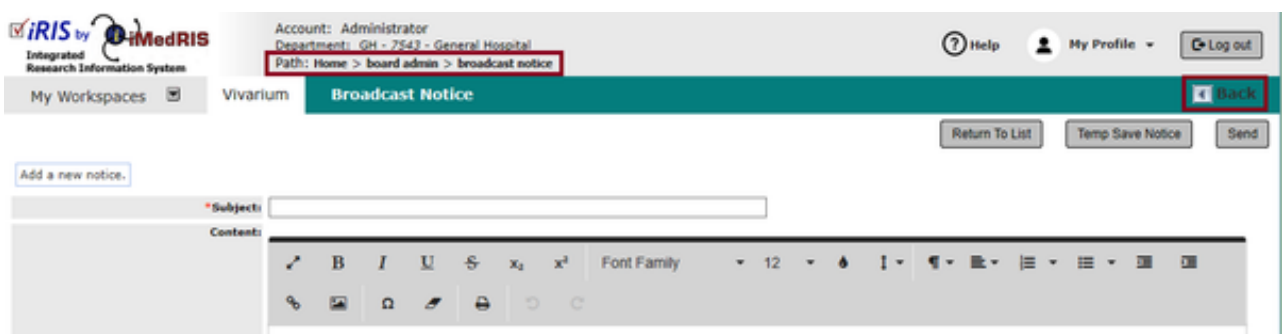
Navigation in iRIS™

iRIS™ includes two standard navigation tools on all pages nested one or more levels beneath the primary Workspace page of the module currently in use (e.g., Study Assistant, Conflict of Interest Assistant, Animal Resource Center, etc.): a Path directory tree, and Back buttons.

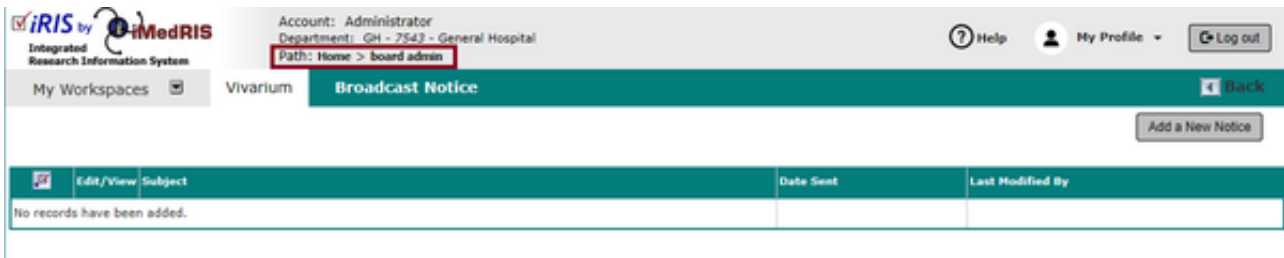
Path Directory Tree

The **Path** item at the upper left of iRIS™ pages provides a hyperlinked menu directory tree, allowing the user to quickly navigate back through the path they followed to get to their current location. **Path** appears on all pages nested at least one level beneath the main workspace

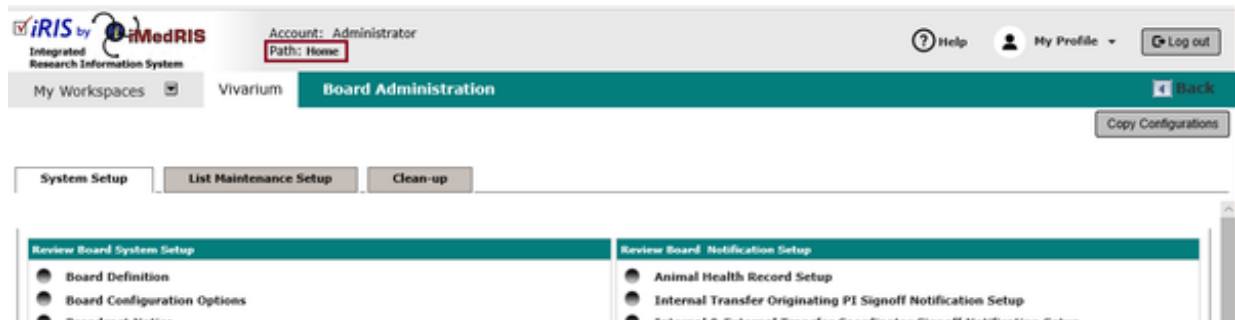
In the example shown the user is viewing the **Broadcast Notice Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



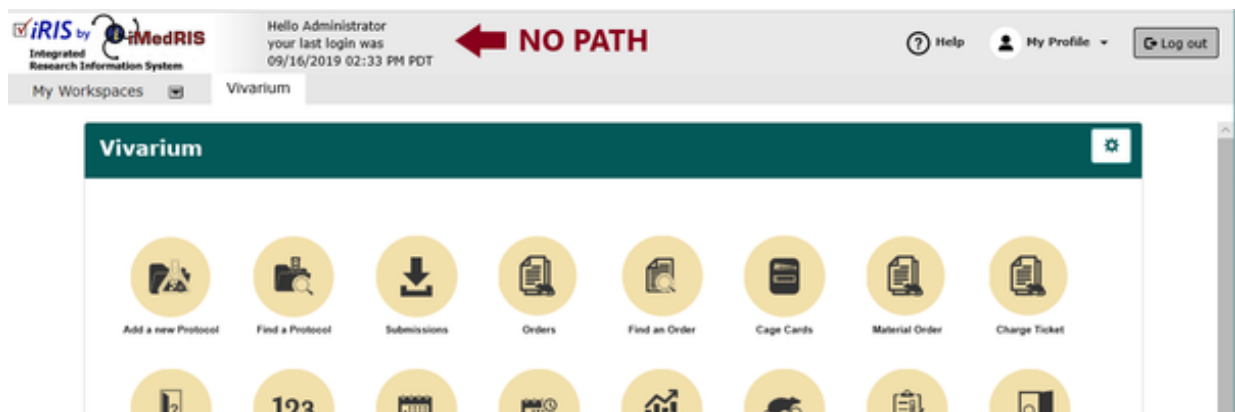
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



Click on **board admin** in the **Path** to navigate up one level in the directory tree, to the **Board Administration** page. There is now one level in the **Path: Home**.

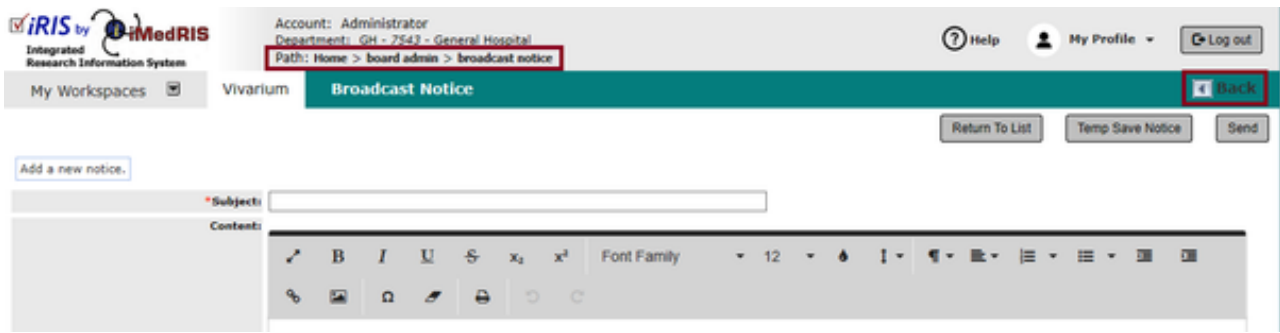


Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.

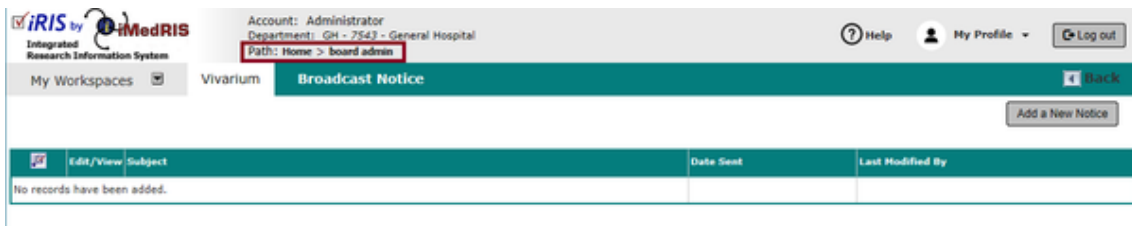


Back Button

The second navigation tool is the **Back** button, which appears on all pages nested at least one level beneath the main workspace. The **Back** button takes the user to the same location as the last link shown in the **Path**.



In the example shown above, both the **Back** button and the **broadcast notice** link in the **Path** return the user to the **Broadcast Notice** page:



Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

*Note that where the **Back** button appears on a page with editable fields or document upload controls, clicking the button before saving changes returns the user to the same location as the last link shown in the **Path** without saving changes.*

Charge Ticket

Navigate to ARC > ARC Workspace and click the **Charge Ticket** icon, shown below.



Note that because the user has the option to rearrange icons on this page, the **Charge Ticket** icon may not appear in the same location on every user's ARC Workspace page.

As shown below, the **Charge Ticket** page opens.

Use the search form at top to filter charge tickets by **Account Number**, **Account Name**, **Account Owner**, **Billing Period**, **Ticket ID**, **Facility** or **Service Date Between** range. Note that the **Billing Period** field defaults to the current month.

Click the **Find ...** button to apply filters. Click the **Reset Find Options** button to clear the search form.

Click the **Create Charge Ticket** button to create a new charge ticket. As shown below, the Charge Ticket popup opens for creation of the new charge ticket.

Click the calendar widget for **Service Date**, navigate to the desired date and click to select it.

Click in the **Facility** field to open a drop down list of facilities configured in the system. Note that this list is maintained under *Review Board Administration > System Setup > List Configuration*. See the *ARC Facilities manual* for more information about configuration of facility records.

Enter the desired **Other REF #**, **Internal Notes** and **Customer Notes**.

In the **Payment Information** section, complete the **Account Number** field to populate the picklists of the **Received By** field, then click in the **Received By** field to open the list and click an item in the list to select it. Alternatively, enter the **Cage ID** and click the **Search by Cage ID** button to pull in the values for these fields previously associated with a specific cage.

Enter the applicable **IACUC Number**.

In the charge item list at the bottom of the page, for each item:

Click in the **Charge Type** field and click to select a type from the list. This selection populates the list for the next data field, **Charge Item**, limiting the list to items associated with the selected type.

Click in the **Charge Item** field and click to select an item from the list.

Note that the lists for **Charge Type** and **Charge Item** are configured under Review Board Administration > System Setup > List Maintenance. See the ARC Orders and Billing manual for more information about setup of configuration lists for ordering and billing.

Enter the applicable **Item Price**, **Quantity** and **Item Notes**. Note that the **Item Notes** field is required, an error will display if the Charge Ticket is saved with a blank **Item Notes** field.

The **Item Total** and **Ticket Total** fields automatically calculate based on **Item Price** and **Quantity** field entries.

An example of the completed popup is shown below. Click the **Save** button to save the **Charge Ticket** and close the popup.

Charge Ticket

Ticket ID: < Generated on Save > **Save**

* Service Date: 09/28/2020

Facility: Animal Housing Facility

Other REF#

Internal Notes: Arc Internal Use Only

Customer Notes: For Customer Reference

Payment Information:

Cage ID: Search by Cage ID

* Account Number: 8899 Received By: Mather, Ann N, B.S.

IACUC Number:

Notes:
 *When adding new items to previously created charge tickets, the updated items for the selected Service Date will be displayed in the charge item dropdown list.
 *Once an updated item is selected from the dropdown list, the old charge item will be immediately removed from the ticket.

Add Charge Item Delete Charge Item

Charge Type	Charge Item	Item Price	Quantity	Item Total	Item Notes
<input type="checkbox"/> Food	Small Rodent Mineral Block	\$ 4.00	4	16.00	1 block per 10 animals
<input type="checkbox"/> -none-	-none-	\$			
<input type="checkbox"/> -none-	-none-	\$			
<input type="checkbox"/> -none-	-none-	\$			
<input type="checkbox"/> -none-	-none-	\$			
Ticket Total :				16.00	

As shown below, the **Charge Ticket** record is added under the applicable **Billing Period**.

My Workspaces | ARC | **Charge Ticket** | Back

Account Number: Account Name: Account Owner: Billing Period: September 2020

Ticket ID: Facility: Service Date Between:

Reset Find Options Find ... Create Charge Ticket

13 result(s) found...

Ticket ID	Account Number	Account Owner	Account Status	Account Expiration Date	Service Date	Received By	Last Modified By	Invoice Number	Facility	Total Amount
TKT-20-94	8899	Mather, Ann N, B.S.	Open	03/10/2021	09/28/2020	Matur, Anu J, Dc.	admin, Admin Admin	Not Invoiced	Animal Housing Facility	\$16.00

Click the number in the **Ticket ID** column to open the **Charge Ticket** for editing. The ticket is opened in the same Charge Ticket popup as that shown in the **Charge Ticket** popup screenshot shown previously.

Click the plus sign in the plus sign column (to the left of the **Account Number** column) to expand details of charges included on the corresponding ticket, as shown below.

My Workspaces ▾ ARC **Charge Ticket** Back

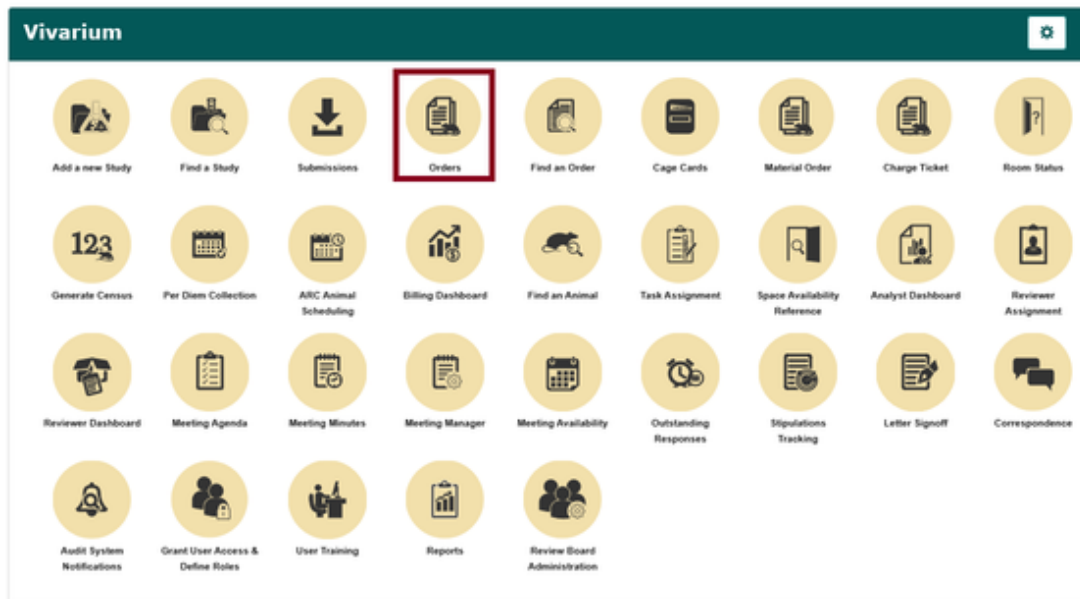
Account Number: <input type="text"/>	Ticket ID: <input type="text"/>	<input type="button" value="Reset Find Options"/> <input type="button" value="Find ..."/>
Account Name: <input type="text"/>	Facility: <input type="text" value="All"/>	
Account Owner: <input type="text"/>	Service Date Between: <input type="text"/> - <input type="text"/>	
Billing Period: <input type="text" value="September 2020"/>		<input type="button" value="Create Charge Ticket"/>

13 result(s) found...

Ticket ID	Account Number	Account Owner	Account Status	Account Expiration Date	Service Date	Received By	Last Modified By	Invoice Number	Facility	Total Amount
TKT-20-94	8899	Hather, Ann N, B.S.	Open	03/10/2021	09/28/2020	Haur, Anu J, Dr.	admin, Admin Admin	Not Invoiced	Animal Housing Facility	\$16.00
Charge Type	Charge Item	Item Price	Quantity	Item Total	Item Notes/Comments					
Food	Small Rodent Mineral Block	\$4.00	4.00	\$16.00	1 block per 10 animals					

Orders

Navigate to ARC > ARC Workspace and click the **Orders** icon, shown below.



Note that because the user has the option to rearrange icons on this page, the **Orders** icon may not appear in the same location on every user's ARC Workspace page.

As shown below, the **Orders** page opens.

My Workspaces ▾ Vivarium **Orders** Back

Find an Order Filters

Form Types: <input type="text" value="-- All --"/>	Principal Investigator: <input type="text"/>	<input type="button" value="Find ..."/>
Species: <input type="text"/>	Display Orders by Facility: <input type="text" value="-- All --"/>	

4 result(s) found... 1 - 4

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Total Requested	Date Board Received
	New Request	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for Z1P4-mediated Cachexia in Pancreatic Cancer	IACUC-2019-044	null	Animal Resource Center Internal Transfer Form	Investigator, John Samson II, B.S.	Mouse - C57BL/6	1	03/09/2019 10:17 PM PST
	New Request	in vivo study of oncolytic vesicular stomatitis virus	ORDER-2019-034	Animal Resource Center Order Form	California State University	Investigator, John Samson II, B.S.	Mouse - C57BL/6	20	04/26/2019 01:38 PM PST
	New Request	in vivo study of oncolytic vesicular stomatitis virus	ORDER-2019-036	Animal Resource Center Order Form	General Facility	Investigator, John Samson II, B.S.	Mouse - C57BL/6	5	04/29/2019 10:53 AM PST
	New Request	Does dietary methionine restriction activate the sympathetic nervous system?	IACUC-2019-077	Animal Resource Center Order Form	General Facility	Investigator, John Samson II, B.S.	Mouse - C57BL/6	20	05/22/2019 10:05 AM PST

This page is where animal orders are managed, tracked and reconciled. Each tab on the page encompasses a different stage of order processing, and order records move through the various tabs as their processing statuses are updated.

The lower part of the page displays a queue of **Orders** that correspond to the processing stage encompassed by the active tab. Click the **Print Friendly** button (shown below) to open a simplified view of the displayed queue in a separate window.

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Total Requested	Date Board Received
	New Request	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZIP4-mediated Cachexia in Pancreatic Cancer IACUC-2019-044	null	Animal Resource Center Internal Transfer Form		Investigator, John Samson II, B.S.	Mouse - C57BL/6	1	03/09/2019 10:17 PM PST
	New Request	in vivo study of oncolytic vesicular stomatitis virus IACUC-2019-060	ORDER-2019-034	Animal Resource Center Order Form	California State University	Investigator, John Samson II, B.S.	Mouse - C57BL/6	20	04/26/2019 01:38 PM PST
	New Request	in vivo study of oncolytic vesicular stomatitis virus IACUC-2019-060	ORDER-2019-036	Animal Resource Center Order Form	General Facility	Investigator, John Samson II, B.S.	Mouse - C57BL/6	5	04/29/2019 10:53 AM PST
	New Request	Does dietary methionine restriction activate the sympathetic nervous system? IACUC-2019-077	ORDER-2019-044	Animal Resource Center Order Form	General Facility	Investigator, John Samson II, B.S.	Mouse - C57BL/6	20	05/22/2019 10:05 AM PST

Click the **Print** button in the print friendly window to print a copy of the queue. Click the **Close** button to close the print friendly window.

Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Total Requested	Date Board Received
New Request	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZIP4-mediated Cachexia in Pancreatic Cancer IACUC-2019-044	null	Animal Resource Center Internal Transfer Form	null	Investigator, John Samson II, B.S.	Mouse - C57BL/6	1	03/09/2019 10:17 PM PST
New Request	in vivo study of oncolytic vesicular stomatitis virus IACUC-2019-060	ORDER-2019-034	Animal Resource Center Order Form	California State University	Investigator, John Samson II, B.S.	Mouse - C57BL/6	20	04/26/2019 01:38 PM PST
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New Request	Does dietary methionine restriction activate the sympathetic nervous system? IACUC-2019-077	ORDER-2019-044	Animal Resource Center Order Form	General Facility	Investigator, John Samson II, B.S.	Mouse - C57BL/6	20	05/22/2019 10:05 AM PST

Back on the **Orders** page, the **Approved for Ordering**, **Pending Approval**, **In Progress Orders**, **Quarantine** and **Completed** tabs are displayed by default.

*Note that the user's role and rights as assigned by the System Administrator can dictate which tabs are available on the **Orders** page, and which fields on all related pages and forms are editable or set to read-only.*

A **Pending Orders to Vendor** tab is included when the `system.use_merge_vendor_orders` property under iRIS™ System Administration > System Configuration > **Animal Resource Center** link (shown below) is set to “Yes”.

Animal Resource Center

Name	Value
<code>system.use_arc_census_for_billing</code> Description: This properties controls whether census must be finalized in order to proceed with billing.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_cost_center_user_access</code> Description: This property controls whether the user-cost center association is used.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_foundation</code> Description: This property controls whether the Foundation number question is used.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_lock_animal_id</code> Description: This property controls whether an Animal ID can be edited within an animal profile.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_payments</code> Description: This properties controls whether the ARC Billing Dashboard is used for managing payments.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_pi_button</code> Description: This property controls whether the PI search button will be displayed on an internal transfer form or not.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_requisition</code> Description: This property controls whether the Requisition number question is used.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_reverse_transfer</code> Description: This property controls the reversal of the animal transfer process. If set to YES, animal transfers must be initiated by the Original PI.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_study_accounts</code> Description: This property controls whether the Account Number question will use the accounts previously setup in the study or not.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_unique_anatomical_features</code> Description: This property controls whether the Unique Anatomical Features question is used.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_census_generation_pattern</code> Description: This property controls whether IRIS will generate the census using the system pattern under Review Board Administration.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_merge_vendor_orders</code> Description: This property controls whether the Pending Orders to Vendor queue will be displayed.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_received_reconciled_orders</code> Description: This property controls whether the Received Orders and Reconciled queues will be displayed.	<input checked="" type="radio"/> Yes <input type="radio"/> No

Received Orders and **Reconciled** tabs are included when the `system.use_received_reconciled_orders` property under iRIS™ System Administration > System Configuration > **Animal Resource Center** link (shown below) is set to “Yes”.

Animal Resource Center

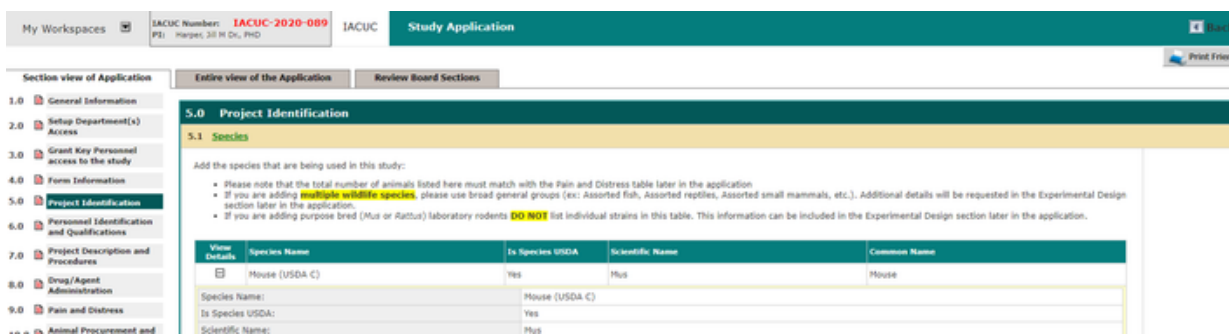
Name	Value
<code>system.use_arc_census_for_billing</code> Description: This properties controls whether census must be finalized in order to proceed with billing.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_cost_center_user_access</code> Description: This property controls whether the user-cost center association is used.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_foundation</code> Description: This property controls whether the Foundation number question is used.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_lock_animal_id</code> Description: This property controls whether an Animal ID can be edited within an animal profile.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_payments</code> Description: This properties controls whether the ARC Billing Dashboard is used for managing payments.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_pi_button</code> Description: This property controls whether the PI search button will be displayed on an internal transfer form or not.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_requisition</code> Description: This property controls whether the Requisition number question is used.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_arc_reverse_transfer</code> Description: This property controls the reversal of the animal transfer process. If set to YES, animal transfers must be initiated by the Original PI.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_study_accounts</code> Description: This property controls whether the Account Number question will use the accounts previously setup in the study or not.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_arc_unique_anatomical_features</code> Description: This property controls whether the Unique Anatomical Features question is used.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_census_generation_pattern</code> Description: This property controls whether IRIS will generate the census using the system pattern under Review Board Administration.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<code>system.use_merge_vendor_orders</code> Description: This property controls whether the Pending Orders to Vendor queue will be displayed.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<code>system.use_received_reconciled_orders</code> Description: This property controls whether the Received Orders and Reconciled queues will be displayed.	<input checked="" type="radio"/> Yes <input type="radio"/> No

Animal Ordering Process Overview

The process of obtaining study animals and allocating them to the study involves steps on both the study side and the board side. The following subsections outline these general steps, in order, for a typical animal study application with a standard animal ordering and approval process. More detailed order processing information is provided in subsections following this overview.

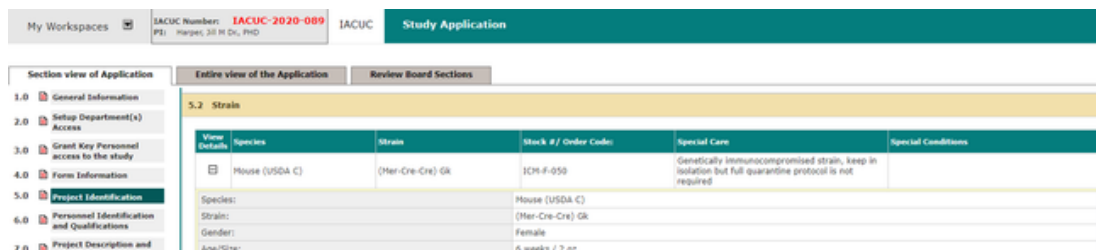
Add Species to Application (Study Side / Role)

Study side personnel create an IACUC study application, including animals in the **Species** section of the application (shown below).



Note that the study application form is configurable by the institution. Form section names and numbering may vary from those shown in this manual.

Where any of the requested study animals are of a specific strain, the strain(s) must also be specified during the application process to make strain-dependent fields available during study management.



Where study personnel will interact with study animals in any way (as opposed to observation only, USDA Pain and Distress classification "A" studies), at least one procedure or treatment must be added in the appropriate section of the application in order to enable assignment of treatment tasks and plans during study management.

My Workspaces | IACUC Number: IACUC-2020-009 | IACUC | Study Application

Section view of Application | Entire view of the Application | Review Board Sections

1.0 General Information
2.0 Setup Department(s) Access
3.0 Grant Key Personnel access to the study
4.0 Forms Information
5.0 Project Identification
6.0 Personal Identification and Qualifications
7.0 Project Description and Procedures
8.0 Drug/Agent Administration

7.6 Procedures

Select Procedure Type:
 Treatment Procedure
 Surgery Procedure

Please add your treatment procedures to the protocol

View Description	Species	Is USDA Species	Procedure Type	Procedure Name
<input type="checkbox"/>	Mouse (USDA C)	Yes	Treatment	Services and Procedures
Species:		Mouse (USDA C)		
Is USDA:		Yes		
Procedure Type:		Treatment		

When the application is complete and submitted, it enters a Pending – Submitted for Initial Review status.

Approve the Submission (Board Side/Role)

The board representative sets a review process and assigns the reviewer(s) on the **Pre-review Screening** tab (shown below) and reviews study information provided via the other sidebar tabs, including species information.

My Workspaces | Study Number: IACUC2020009 | IACUC | Initial Review Submission Packet | Back

Protocol Items | Miscellaneous | IACUC Items | Submission Forms

Study Pending - Submitted for Initial Review | Study Title: Management, Handling, Husbandry, Medical and Surgical Techniques of Large Laboratory Animals utilizing the Goat (Capra hircus) and the Pig (Sus scrofa).

Save the Pre-Review Screening

General Information
Submission Components
Correspondence
Submission History
Pre-review Screening
Submission Received Notification Letter
Review Checklist and Comments
Reviewer Summary
Submission Discussion
Recommendation
Stipulation
Internal Submission Reading
Outcome
Outcome Letter
Submission Complete

Analyst Assignment
Assign Analyst: --None-- | View Analyst Workload

IACUC Number:
IACUC Number: | Generate Number

Determine Review Process
 Not Assigned
 Full Committee Review
 Expedited
 Pre-Review Forward to another Board/Committee
 Pre-Review changes requested
 Process Administratively

Assign Reviewers
Add Reviewer | View Reviewers Workload

Reviewer Role	Reviewer	Completed ?	Has COE?	Date Notified	Date Completed
No Reviewers have been assigned to this submission.					

The board representative completes the **Outcome** tab, entering all required approval/review/renewal dates, and saves changes. *Important note: the Coordinator must verify Study Species - Currently Approved before completing the submission.*

My Workspaces | Study Number: 147634863486 | PI: Administrator | IACUC | Initial Review Submission Packet | Back

Protocol Items | Miscellaneous | IACUC Items | Submission Forms

Study Status: Pending - Submitted for Initial Review | Study Title: Management, Handling, Husbandry, Medical and Surgical Techniques of Large Laboratory Animals utilizing the Goat (Capra hircus) and the Pig (Sus scrofa).

Save the Submission Outcome

IACUC Review Outcome

Review Outcome: --none--

Additional information required: No

Submission Approval:

Study Status: Pending - Submitted for Initial Review

Assign the Submission to Agenda:

Committee Name: --none--

Meeting Date: --none-- or [click here to select past meetings](#)

Agenda Category: --none--

Internal Comments:

Shared Comments:

Take Note:

Review Cycle: --none--

Teaching: Yes No

Type Assigned: --none--

Temporary Closed: Yes No

IACUC Initial Approval:

IACUC Expiration Date:

Full Review Expiration:

USDA Class: --none--

Continuing Review Date:

General Information | Submission Components | Correspondence | Submission History | Pre-review Screening | Submission Received Notification Letter | Review Checklist and Comments | Review Summary | Submission Discussion | Recommendation | Stipulation | Internal Submission Routing | **Outcome** | Outcome Letter | Submission Complete

The application submission now enters an Approved status.

The board representative completes the submission approval on the **Submission Complete** tab.

My Workspaces | Study Number: 147634863486 | PI: Administrator | IACUC | Initial Review Submission Packet | Back

Protocol Items | Miscellaneous | IACUC Items | Submission Forms

Study Status: Pending - Submitted for Initial Review | Study Title: Management, Handling, Husbandry, Medical and Surgical Techniques of Large Laboratory Animals utilizing the Goat (Capra hircus) and the Pig (Sus scrofa).

Save the Submission Complete

Review Complete

Review Outcome: --none--

Additional information required: No

Study Status: Pending - Submitted for Initial Review

Submission processing complete

Review Outcome Letters

Edit/View	Title	Signature Required	Status
No Letters have been created for this review.			

Display Submission components status

Include in PDF Packet	Compare to Last Approved	View in Separate Window	Unattach	Revises/Attach	Current Submission Components (All Rounds)	More Details
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Initial Review Submission Packet - (Version 1.0)	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IRB Application - (Version 1.0)	<input type="checkbox"/>

General Information | Submission Components | Correspondence | Submission History | Pre-review Screening | Submission Received Notification Letter | Review Checklist and Comments | Review Summary | Submission Discussion | Recommendation | Stipulation | Internal Submission Routing | **Submission Complete** | Outcome Letter

The submission is now ready for further processing by study side personnel, who can now place their animal order(s).

Place the Animal Order (Study Side / Role)

Applicable study personnel navigate to the **Animal Management** tab of the desired study to view details of animals approved for ordering by the IACUC board, and to place their animal orders.

My Workspaces ▼ IACUC Number: **IACUC-2020-089** Study Assistant **Animal Management** Back

Study Status: **Approved** IACUC Number: IACUC-2020-089 Study Title: Insulin Resistance in Immunocompromised, Breeding Mice
 IACUC Expiration Date: 02/11/2023

Submissions Study Management **Animal Management**

Space Management

Animal Orders

Animal Ordering

Animal Transfer

Cage Management

Animal Details

Animal Breeding

Forms

Approved Animals

Species: Mouse (USDA C) Strain: (Mer-Cre-Cre) Gk Stock #/Order Code: ICM-F-050 Sex: Female Age: 6 weeks / 2 oz Breeding: Yes USDA: Yes	Species: Mouse (USDA C) Strain: (Mer-Cre-Cre) IC Stock #/Order Code: ICM-M-050 Sex: Male Age: 6 weeks / 2 oz Breeding: Yes USDA: Yes
--	--

Order Tally

Species: Mouse (USDA C)

Total Approved: 100
 Total Pending: 0
 Total On Study: 0
 Total Available: 100

Add a New Order

0 result(s) found...

Edit/View	Status	Order Number	Requested Item	Requested Quantity	Received Amount	Recurring Order	Track Location	Retract Order	Delete Order	Copy Order
No orders have been added.										

Order details are entered and saved on the order form page, including animal, vendor and intended animal location details. *Note that where applicable, accurate details of any species strain(s) approved for use in the study must be included in the order form to ensure strain-related data fields are made available during study management, strain details cannot be added or changed later.*

My Workspaces ▼ IACUC Number: **IACUC-2020-089** Study Assistant **Arc Order Form - (Version 1.0)** Back

Study Status: **Approved** IACUC Number: IACUC-2020-089 Study Title: Insulin Resistance in Immunocompromised, Breeding Mice
 IACUC Expiration Date: 02/11/2023

Save Form

Order Number: <Generated on Save>

Order Status: **Draft**

* Order Date: 02/12/2020 📅

* Preferred Delivery Date: 02/13/2020 📅

* Preferred Vendor: Animals R Us - (Animals R Us) ▼

Vendor Notes:

Requested Animals:

Requested Species: Mouse (USDA C) ▼

Requested Strain: --none-- ▼

Total Approved Animals: 100

Total Available Animals: 100

On the order confirmation page, the study representative clicks the **Signoff and Submit** button to submit the order.

My Workspaces ▼ IACUC Number: **IACUC-2020-089** Study Assistant **Arc Order Form - (Version 1.0)** Back

Study Status: **Approved** IACUC Number: IACUC-2020-089 Study Title: Insulin Resistance in Immunocompromised, Breeding Mice
 IACUC Expiration Date: 02/11/2023

Form has been Completed!

Exit Form

Signoff and Submit

Return to Form

The study side representative then completes submission routing signoff, which sends animal order details back to the board side for review and approval.

My Workspaces Study Assistant Submission Routing Signoff Back

Save Signoff

Study Title: Insulin Resistance in Immunocompromised, Breeding Mice
Submission Reference Number: IACUC-2020-089-ORD-1.0

Printable Version

Include in PDF Packet	Compare to Last Approved	View in Separate Window	Submission Component Name - Version
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arc Order Form - (Version 1.0)

Administrator as Submitter
do you Approve or Deny this submission? Approve Deny

Save Signoff

Approve and Place the Animal Order (Board Side / Role)

The board side representative looks up and opens the animal order for the applicable study, completes the **Order Information** tab and processes the order.

My Workspaces IACUC Number: IACUC-2020-089 Vivarium Processing Animal Order Request Back

Study Status: Approved IACUC Number: IACUC-2020-089 Study Title: Insulin Resistance in Immunocompromised, Breeding Mice
IACUC Expiration Date: 02/11/2023

Order Information Save Order Deny Order Process Order

Request Information:
Approval for Administrator with the role of Submitter:
*Order Date: 02/12/2020
*Expected Delivery Date: 02/13/2020
Confirmation Number:
Requestion Number:
*Method of Ordering: Web Email Pager Fax Phone
*Vendor: Animals R Us - (Animals R Us) Find Contact

The order is sent to the vendor. Status of the order is updated to “In Progress” on both the board and study side.

Process Receipt of the Animal Order (Board Side Role)

When the livestock shipment arrives the responsible Coordinator or board representative looks up the applicable order, completes the **Receiving Information** tab (the tab appears when an animal order is approved per the previous step in this process) and marks the order received.

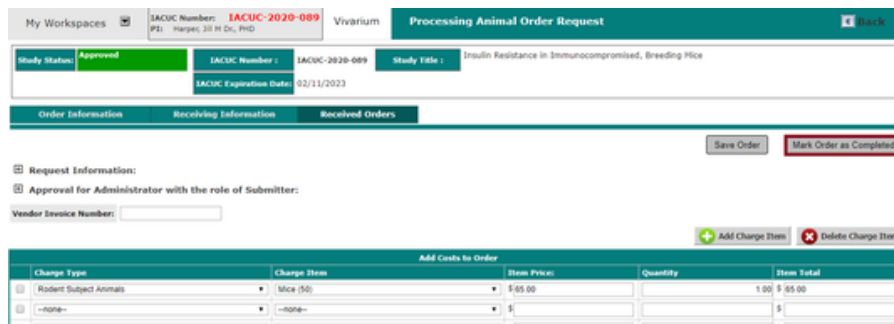
My Workspaces IACUC Number: IACUC-2020-089 Vivarium Processing Animal Order Request Back

Study Status: Approved IACUC Number: IACUC-2020-089 Study Title: Insulin Resistance in Immunocompromised, Breeding Mice
IACUC Expiration Date: 02/11/2023

Order Information Receiving Information Save Order Mark Order as Received

Request Information:
Approval for Administrator with the role of Submitter:
*Date Animals were Received:
*Container OK: Yes No
Received:

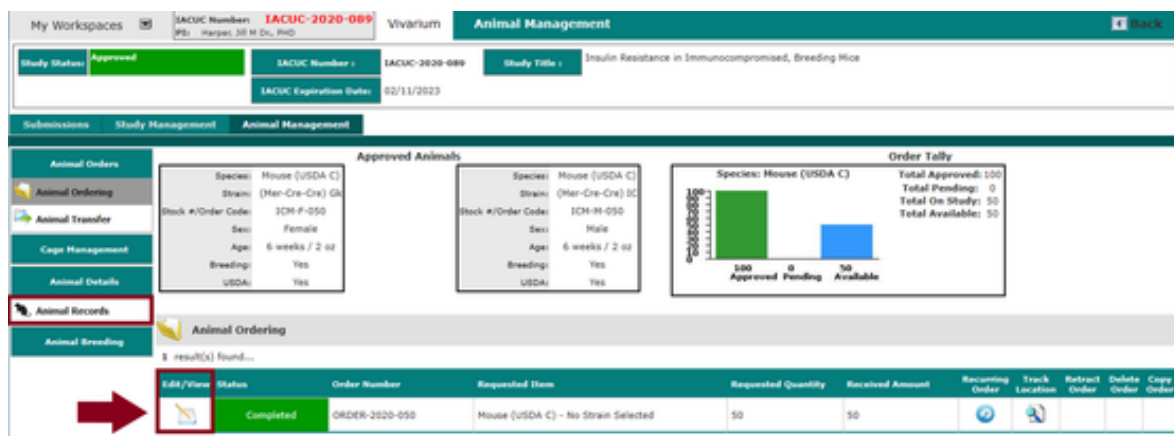
A **Received Orders** tab appears for entry of study charge item details. This is where costs associated with animal orders are allocated to the study. The board representative enters all charge items for the received order and clicks the **Mark Order as Completed** button. The day that the order is marked complete is the applicable date for when the order appears in the billing invoice month.



With this action, the board representative releases control of the animals to study side personnel. The order status is updated to either “Quarantine” (if the animals are released into quarantine) or “Completed” (if the animals are released directly to the study).

Animal Management (Study Side / Role)

When animals are released to the study, the applicable study side representative opens the study and navigates to the **Animal Management** tab, as shown below.



Animal Ordering details are shown on the right-hand side of the page. Study personnel can click the icon in the **Edit/View** column (red arrow in screenshot above) for any orders shown here to view order details.

When the **Animal Details** sidebar tab is clicked it expands to reveal an **Animal Records** link (shown in screenshot below). Study personnel click this link to access the **Animal Records** panel, which includes a list of all animals released to the study (shown in screenshot below).

Clicking the icon in the **Edit** column (shown in screenshot above) for any animal record listed opens the record for the corresponding animal. See the Animal Resource Center Livestock Management manual for information about subject animal management and tracking.

Animal Transfer Processing

An animal transfer request is typically used to distribute the offspring of breeding animals on a study, or to move animals from one study to another.

The Primary Investigator (PI) on each of the two studies involved in the transfer must sign off to approve or deny the request, and transfer processing allows for rounds of revision and review of the request between the PIs.

Two types of animal transfer requests can be made from the study side: internal and external.

internal — this type is used to transfer animals allocated to the study currently open in the Animal Management tab (the originating study) OUT to on a different (receiving) study; when this type of request is approved by the receiving PI, the animals are automatically transferred to the receiving study with no further rounds of approval

external — this type is used to request the transfer of animals allocated to a different study INTO the study currently open in the Animal Management tab; this type of request requires approval from both the sending study PI and the Transfer Coordinator from the board of the sending study before the animals are released to the requesting study

The difference between an external transfer request and a direct vendor order is that in a transfer request animals are being moved from one study/protocol to another within the same institution or institutional network, meaning that the animal records already exist in the iRIS™ system and are only being reassigned from one study to another. In contrast, animals purchased from an outside supplier must be entered into the iRIS™ system following an ordering, receiving and inspection process.

Important Note: When transfers are completed in the system, cage cards must be updated to ensure an accurate census.

See the Order Processing section of this manual for more information about direct vendor orders.

Internal Transfer Order

Internal transfer order requests are used to move surplus animals allocated to a study (the originating/sending study) OUT to a Primary Investigator (PI) on a different (external/receiving) study.

The receiving study PI reviews the request and takes one of the following actions:

denied — the receiving study PI denies the animal transfer request; applicable animal records remain with the sending study; *note that only the transfer request is denied in this case, the study submission remains active*

approved with no changes — the receiving study PI grants permission for the animal transfer to proceed without changes; applicable animal records are immediately transferred from the Animal Management tab of the sending study to the same tab of the receiving study

approved with changes — the receiving study PI grants permission for the animal transfer to proceed with specified changes; applicable animal records remain with the sending study, whose PI must review and optionally approve the changes proposed by the receiving PI; if the sending study PI approves the changes, applicable animal records are immediately transferred from the Animal Management tab of the sending study to the same tab of the receiving study

Where the receiving PI returns the request as approved with changes, the sending PI has the option to make further revisions to the request and send it back to the receiving PI in another round of approvals. At that point the receiving PI has the same three response options listed above.

Sending Study Transfer Request

With the study open on the study side (Find a Study > [open]), click the **Animal Management** tab (shown below).

The screenshot shows the 'Animal Management' interface. The left sidebar has 'Animal Transfer' selected. The main area shows 'Approved Animals' with two profiles: one for a Mer-Mer-Cre Gk mouse and one for a 1-alpha hase KO mouse. An 'Order Tally' bar chart shows 500 Approved, 20 Pending, and 457 Available animals. A table below shows two orders: one 'New Request' (ORD-20-817) and one 'Completed' (ORD-20-814).

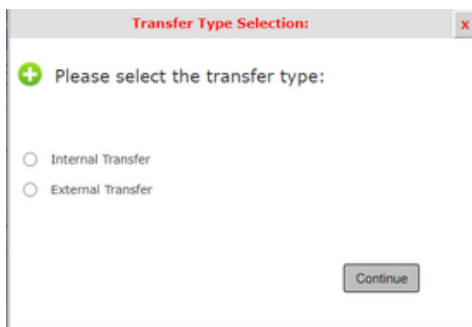
Edit/View	Status	Order Number	Requested Item	Requested Quantity	Received Amount	Recurring Order	Track Location	Retract Order	Delete Order	Copy Order
	New Request	ORD-20-817	Mouse - 1-alpha hase KO	20	0					
	Completed	ORD-20-814	Mouse - (Mer-Mer-Cre) Gk	8	8					

In the left hand sidebar (shown above), the **Animal Ordering** tab is selected by default. Click the **Animal Transfer** tab to open the **Animal Transfer** panel, shown below.

The screenshot shows the 'Animal Management' interface with the 'Animal Transfer' tab selected in the sidebar. The main area shows 'Approved Animals' and an 'Order Tally' bar chart. Below, the 'Animal Transfer' section is empty, with a table header and a message: 'No transfers have been added.'

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 (red box in screenshot above). The **Transfer Type Selection** popup loads, as shown below.



Transfer Type Selection: x

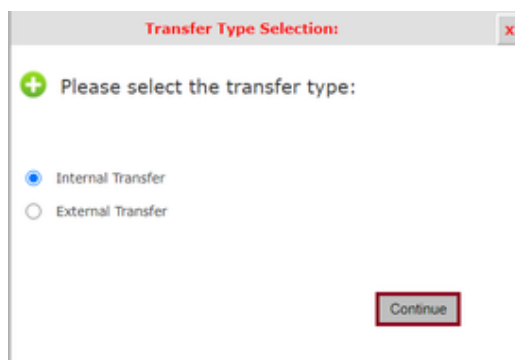
+ Please select the transfer type:

Internal Transfer

External Transfer

Continue

Notice that neither transfer type is selected by default. Click to select the radio button for **Internal Transfer** and click the **Continue** button.



Transfer Type Selection: x

+ Please select the transfer type:

Internal Transfer

External Transfer

Continue

The **Internal Transfer Form** page opens, as shown below.

My Workspaces Study Assistant **Animal Resource Internal Transfer Form - (Version 1.0)** [Back](#)

Study Status: **Active** IRB Number: **IRB-20-7307** Study Title: Test for 23004 - 7/25/20

[Save Form](#)

Transfer Number: <Generated on Save>

Order Status: **Draft**

*Request Date: 09/27/2020

*Date of Proposed Transfer: 09/30/2020

Source: Internal

Requested Animal Transfer:

Species:

Strain:

*Stock #/Order Code:

*Age/Size:

Special Conditions:

Study Transfer:

Transfer Animals FROM:	Transfer Animals TO:						
*Original PI: Ann J Mather, Dc	*PI: <input type="text"/>						
*Original Study Number: IAC 20-245	*Study Number: <input type="text"/>						
Order Charge Account: <input type="text"/>	Lab Contact Person: <input type="text"/>						
Original Animal Order Number: <input type="text"/>	Phone Number: <input type="text"/>						
Lab Contact Person: <input type="text"/>	Email: <input type="text"/>						
Phone Number: <input type="text"/>	Cage Type: <input type="text"/>						
Email: <input type="text"/>	Requesting Location: <input type="text"/>						
Current Location: <input type="text"/>	Transfer to Building: <input type="text"/>						
Current Building: <input type="text"/>	Transfer to Room: <input type="text"/>						
Current Room: <input type="text"/>							
Cage(s) to Transfer Animals From: <input type="text"/>							
Total Quantity of Animals: 0							
<input type="button" value="Search Animals"/> <input type="button" value="Search Cages"/>							
<table border="1"> <thead> <tr> <th>Cage ID</th> <th>Animal ID</th> <th>Sex</th> </tr> </thead> <tbody> <tr> <td colspan="3">No Animals have been entered.</td> </tr> </tbody> </table>	Cage ID	Animal ID	Sex	No Animals have been entered.			
Cage ID	Animal ID	Sex					
No Animals have been entered.							

Veterinarian Information:

*Name:

*Phone Number:

Fax Number:

*Email:

Transfer Coordinator:

*Name:

*Phone Number:

Fax Number:

*Email:

Request Date defaults to the current date, but the field is editable. To change the date, click the calendar icon to open the calendar widget. Navigate to the desired date and click to select it.

Click the calendar icon for **Date of Proposed Transfer** to open the calendar widget. Navigate to the desired date and click to select it.

Notice that the **Source** field defaults to “Internal”, and that this field is not editable.

This section of the page is shown completed and in isolation below.

Transfer Number: <Generated on Save>

Order Status: **Draft**

*Request Date: 09/27/2020

*Date of Proposed Transfer: 09/30/2020

Source: Internal

Complete the **Requested Animal Transfer** section, shown in isolation below, as demonstrated.

Requested Animal Transfer:

Species:

Strain:

*Stock # / Order Code:

*Age/Size:

Special Conditions:

Dropdown pick lists are provided for selection of **Species** and **Strain**. Note that the **Strain** picklist does not populate until a **Species** is selected. Only the approved strain for the species is available for selection. These lists are maintained under Review Board Administration > List Maintenance. See the ARC List Maintenance Manual for more information.

Enter the applicable **Stock # / Order Code**, **Age / Size** and any desired **Special Conditions** comments.

In the **Study Transfer** section, complete the **Transfer Animals FROM:** panel as demonstrated in the example below.

Study Transfer:

Transfer Animals FROM:

*Original PI: Anu J Mathur , Dr.

*Original Study Number: IAC-20-2451

Order Charge Account:

Original Animal Order Number:

Lab Contact Person:

Phone Number:

Email:

Current Location:

Current Building:

Current Room:

Transfer Animals TO:

*PI:

Study Number:

Lab Contact Person:

Phone Number:

Email:

Cage Type:

Requesting Location:

Transfer to Building:

Transfer to Room:

Cage(s) to Transfer Animals From:

Total Quantity of Animals: 0

Cage ID	Animal ID	Sex
No Animals have been entered.		

The **Original PI** and **Original Study Number** fields automatically populate as read-only.

Dropdown picklists are provided for selection of **Order Charge Account** and **Original Animal Order Number**.

Enter the **Lab Contact Person** name, **Phone Number** and **Email**.

Under **Current Location**, dropdown picklists are provided for selection of the **Current Building** and **Current Room** where the animal(s) to be transferred is/are currently located.

Current Location:

Current Building:

Current Room:

Requesting Location:

Transfer to Building:

Transfer to Room:

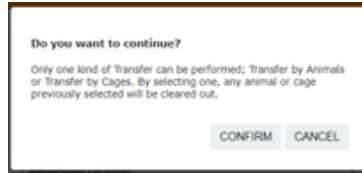
Cage(s) to Transfer Animals From:

Total Quantity of Animals: 0

Cage ID	Animal ID	Sex
No Animals have been entered.		

Specific animals from the specified location can be selected for transfer by animal tracking number or cage.

To locate animals by tracking number, click the **Search Animals** button. If selections have previously been made via the **Search Cages** function, the popup shown below displays.



Click the **CANCEL** button to retain any previous selections and close the popup without making any changes. Click the **CONFIRM** button to continue.

The **Animals to be Transferred: Search Options** popup opens for animal selection, as shown below. Note that only the animals listed in the table in the popup are available for transfer.

Select Animal	Animals received by	Cage ID	Animal ID	Sex
<input type="checkbox"/>	Order	IAC-20-2451_00002	IAC-20-2451_F_00006	Female
<input type="checkbox"/>	Order	IAC-20-2451_00002	IAC-20-2451_F_00007	Female
<input type="checkbox"/>	Order	IAC-20-2451_00002	IAC-20-2451_F_00008	Female

Notice that the **Species**, **Original Order Number** and **Strain** fields auto-populate as read only, and that the **Select Specific Animals** radio button is selected by default. While this radio button is selected, the **Number of Animals** and **Specify Sex** fields are disabled.

Please note the **Instructions** box (yellow highlighted box in screenshot above).

To select a specific animal or animals, with the **Select Specific Animals** radio button selected, click the applicable checkbox(es) in the **Select Animal** column and click the **Apply Animals** button (beneath the **Instructions** box in screenshot above) to close the popup and save selections.

To let the system choose the specific animals at random, click to select the **Auto Select Animals** radio button. If animal sex need not be specified, enter the desired **Number of Animals** and click the **Apply Animals** button to save selections and close the popup.

To let the system choose the specific animals but limit selections by sex, click to select the **Specify Sex** checkbox. As shown below, a section for entry of quantity of animals of each sex populates. Enter the desired number of **Males** and **Females**. If any quantity of the transferred animals can be of either sex, enter that quantity in the **Unknown** field.

Animals be Transferred: Search Options X

Species: Mouse
 Original Order Number: ORD-20-814
 Strain: (Mer-Mer-Cre) Gk
 Cage ID:

Select Specific Animals
 Auto Select Animals

Number of Animals: (Unidentified sex)
 Specify Sex

Males:
 Females:
 Unknown:

Instructions:

1. **Select Specific Animals:** You must select the desired animals.

2. **Auto Select Animals:** The system auto selects the animals (Please inform the number of required animals) and click search animals button.

3 result(s) found...

Select Animal	Animals received by	Cage ID	Animal ID	Sex
<input type="checkbox"/>	Order	IAC-20-2451_00002	IAC-20-2451_F_00006	Female
<input type="checkbox"/>	Order	IAC-20-2451_00002	IAC-20-2451_F_00007	Female
<input type="checkbox"/>	Order	IAC-20-2451_00002	IAC-20-2451_F_00008	Female

To close the popup without saving selections, click the red X in the upper right corner of the popup. Click the **Apply Animals** button to save selections and close the popup.

Back on the **Internal Transfer Form** page, to locate animals by cage, click the **Search Cages** button (shown below).

Current Location:

Current Building: VMU
 Current Room: 445

Requesting Location:

Transfer to:

Transfer:

Cage(s) to Transfer Animals From:

Total Quantity of Animals: 0

Cage ID	Animal ID	Sex
No Animals have been entered.		

If selections have previously been made via the **Search Animals** function, the popup shown below displays.

Do you want to continue?

Only one kind of Transfer can be performed; Transfer by Animals or Transfer by Cages. By selecting one, any animal or cage previously selected will be cleared out.

Click the **CANCEL** button to retain any previous selections and close the popup without making any changes. Click the **CONFIRM** button to continue.

The **Animals be Transferred: Search Options** popup opens for animal selection, as shown below. Note that only the animals listed in the table in the popup are available for transfer.

Animals be Transferred: Search Options X

Species: Mouse
 Original Order Number: ORD-20-814
 Strain: (Mer-Mer-Cre) Gk
 Cage ID:

Select Specific Cages

Instructions:

1. **Select Specific Cages:** You must select the desired cage(s).

0 result(s) found...

Select Cage	Origination ID	Cage ID	Number of Males	Number of Females	Number of Unknown	Total
No results found. Click Search Animals to find for animals that match the filter criteria.						

Note that only the animals listed in the table in the popup are available for transfer. *In the example shown above animals for the study have not yet been assigned to cages, so it is not possible to search by cage. Study personnel must use the **Search Animals** function as previously described to find animals for transfer in this situation.*

To select a specific cage or cages, with the **Select Specific Cages** radio button selected (notice that it is automatically selected by default), click the applicable checkbox(es) in the **Select Cage** column and click the **Apply Cages** button (beneath the **Instructions** box in screenshot above) to close the popup and save selections.

To close the popup without saving selections, click the red X in the upper right corner of the popup.

As shown below, the selected animal(s) is/are added to the table at the bottom left of the **Internal Transfer Form** page.

Study Transfer:

Transfer Animals FROM:

* Original PI: Anu J Mathur , Dr.
* Original Study Number: IAC-20-2451
Order Charge Account: 00001 - admin. Admin Admin Mr. B. v
Original Animal Order Number: ORD-20-814 v
Lab Contact Person: Garrett Weimar
Phone Number: 213-900-8888
Email: g.weimar@lab.lab
Current Location:
Current Building: VMU v
Current Room: 445 v

Transfer Animals TO:

Search Studies
* PI:
Study Number:
Lab Contact Person:
Phone Number:
Email:
Cage Type: -none- v
Requesting Location:
Transfer to Building: -none- v
Transfer to Room: -none- v

Cage(s) to Transfer Animals From:

Total Quantity of Animals: 1
Search Animals Search Cages

Cage ID	Animal ID	Sex
<input checked="" type="checkbox"/> IAC-20-2451_00002	IAC-20-2451_F_00006	Female

To select a destination study for the animal(s) to be transferred, click the **Search Studies** button in the **Transfer Animals TO** panel (red arrow in screenshot above).

As shown below, the **Find A Study: Search Options** popup opens for lookup and selection of the desired study.

Find A Study: Search Options

IACUC Number:
Principal Investigator:
Additional Investigators:
Species: Mouse
Alias:
Department:
Sponsor:
Strain: (Mer-Mer-Cre) Gk
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.				

Enter desired search criteria in the fields at top and click the **Find Studies** button.

Find A Study: Search Options

IACUC Number: <input type="text"/>	Alias: <input type="text"/>
Principal Investigator: <input type="text"/>	Department: <input type="text"/>
Additional Investigators: <input type="text"/>	Sponsor: <input type="text"/>
Species: Mouse	Strain: (Mer-Mer-Cre) Gk

7 result(s) found... 1 - 7

Select Study	IACUC Number	Study Alias Study Title	Principal Investigator	Primary Department
<input type="checkbox"/>	IAC-20-2473	Test 20647 Test 20647	Mather , Ann J, Dr.	
<input type="checkbox"/>	IACUC-2020-2370	Test 238283 (Strain S) Test 238283 (Strain S)	Mather , Ann J, Dr.	

Click the icon in the **Select Study** column (red box in screenshot above) for the applicable study to select it. As shown below, the popup closes and the **Study Number** and **PI** fields populate with data from the selected study.

Study Transfer:

Transfer Animals FROM:	Transfer Animals TO:
<p>*Original PI: Ann J Mather , Dr.</p> <p>*Original Study Number: IAC-20-2451</p> <p>Order Charge Account: 00001 - admin, Admin Admin Mr, B</p> <p>Original Animal Order Number: ORD-20-814</p> <p>Lab Contact Person: Garrett Welmar</p> <p>Phone Number: 213-000-8888</p> <p>Email: g.welmar@lab.lab</p> <p>Current Location:</p> <p>Current Building: VMU</p> <p>Current Room: 445</p>	<p style="text-align: right;"><input type="button" value="Search Studies"/></p> <p>*PI: Ann J Mather , Dr.</p> <p>*Study Number: IAC-20-2473</p> <p>Order Charge Account: --none--</p> <p>Lab Contact Person:</p> <p>Phone Number:</p> <p>Email:</p> <p>Cage Type: --none--</p> <p>Requesting Location:</p> <p>Transfer to Building: --none--</p> <p>Transfer to Room: --none--</p>

Cage(s) to Transfer Animals From:

Total Quantity of Animals: 1

Cage ID	Animal ID	Sex
<input checked="" type="checkbox"/> IAC-20-2451_00002	IAC-20-2451_F_00006	Female

In the example above the sending and receiving PIs are the same. In a case where they are different, a **Search PI** button populates in the **Transfer Animals TO** panel (shown below). Click the button to open a search form for lookup and selection of the applicable study from a list of all studies assigned to the PI shown. When a study is selected in this manner the **Study Number** and **Order Charge Account** fields populate automatically.

Study Transfer:

Transfer Animals FROM:	Transfer Animals TO:
<p>*Original PI: Ann J Mather , Dr.</p> <p>*Original Study Number: IACUC-2020-2368</p> <p>Original Animal Order Number: --none--</p> <p>Lab Contact Person:</p> <p>Phone Number:</p>	<p style="text-align: right;"><input type="button" value="Search PI"/></p> <p>*PI: Hui Xi , Dr.</p> <p>Study Number:</p> <p>Order Charge Account: --none--</p> <p>Lab Contact Person:</p> <p>Phone Number:</p>

Complete the rest of the **Transfer Animals TO** panel as follows.

A dropdown pick list is provided for selection of **Order Charge Account**.

Enter the applicable **Lab Contact Person** name, **Phone Number** and **Email** (for the receiving study).

A dropdown pick list is provided for selection of **Cage Type**.

Dropdown picklists are provided for selection of the **Requesting Location** fields, **Transfer to Building** and **Transfer to Room**.

When the **Transfer Animals TO** panel is complete (as demonstrated below), click the **Save Form** button to continue processing.

The screenshot shows the 'Transfer Animals TO' form in the 'Animal Resource Internal Transfer Form - (Version 2.0)' interface. The form is divided into two panels: 'Transfer Animals FROM' and 'Transfer Animals TO'. The 'Transfer Animals TO' panel is highlighted with a red box and contains fields for 'Original PI', 'Original Study Number', 'Order Charge Account', 'Lab Contact Person', 'Phone Number', 'Email', 'Cage Type', 'Requesting Location', 'Transfer to Building', and 'Transfer to Room'. A red arrow points to the 'Save Form' button in the top right corner of the form area.

As shown below, the **Form Has Been Completed** Screen opens.

The screenshot shows the 'Form has been Completed!' screen in the 'Animal Resource Internal Transfer Form - (Version 1.0)' interface. The screen displays the message 'Form has been Completed!' and 'Form has Been Completed Screen'. Below the message are three buttons: 'Exit Form', 'Signoff and Submit', and 'Return to Form'. The 'Signoff and Submit' button is highlighted with a red box.

Click the **Exit Form** button to close the page to save the transfer request as a draft, with no signoff or submission.

Click the **Return to Form** button to close the page and return to the **Internal Transfer Form** page to make revisions to the transfer request.

Click the **Signoff and Submit** button to continue processing of the transfer request. As shown below, a countdown popup displays to warn that signoff is required to continue processing.

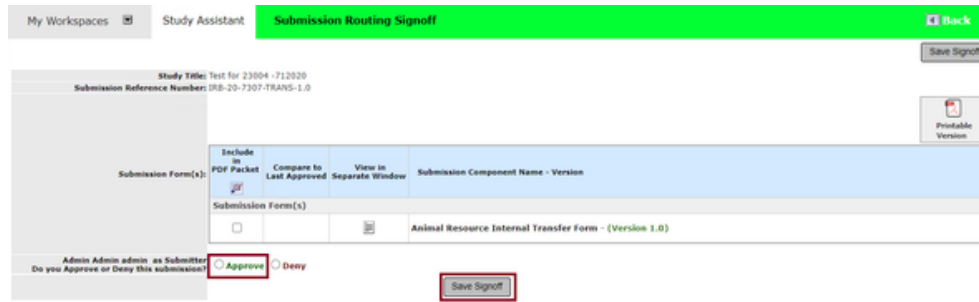
You are required to signoff on the submission.

You will now be redirected to the signoff screen to apply your electronic signature.

You can monitor the submission progress with the Submission Status - In Progress.

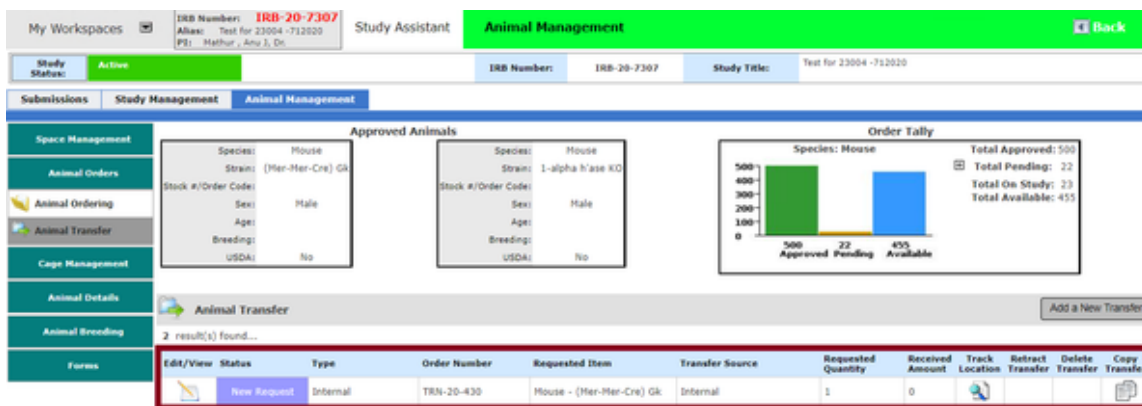
OK (9)

When the countdown popup closes, the **Submission Routing Signoff** page opens, as shown below.



Click to select the **Approve** radio button and click the **Save Signoff** button to complete submission of the transfer request.

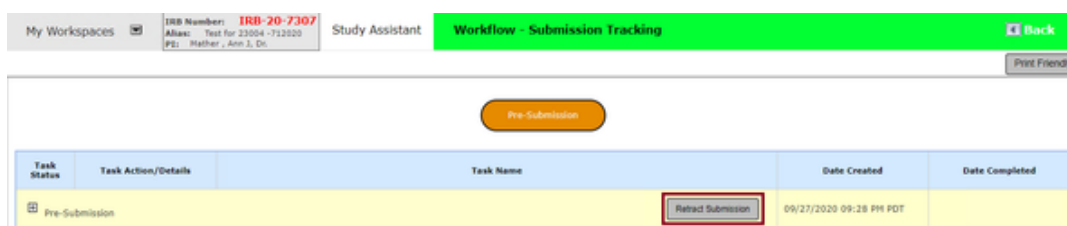
Back on the **Animal Transfer** tab of the study, an entry for the transfer request is added in the **Animal Transfer** section.



Click the icon in the **Edit/View** column to open a read only copy of the request.

Click the icon in the **Copy Transfer** column to open a *copy* of the request for editing, in order to create a new transfer request based on the existing one.

Click the icon in the **Track Location** column to view tracking location details, as shown below.



At this stage of processing, before the receiving PI has approved and signed off on the transfer request, a **Retract Submission** button is available (red box in screenshot above). Click the button to retract the submission, thereby

withdrawing the transfer request. As shown below, back on the **Animal Transfer** tab, the transfer request record is reverted to draft. Click the icon in the **Edit/View** column to open the draft request for revision and further processing.

The screenshot shows the 'Animal Management' interface. At the top, there are navigation tabs for 'Submissions', 'Study Management', and 'Animal Management'. Below this, there are sections for 'Approved Animals' and 'Order Tally'. The 'Order Tally' section includes a bar chart and summary statistics: Total Approved: 500, Total Pending: 21, Total On Study: 23, Total Available: 456. The main table displays a list of transfer requests. The first row is highlighted in blue and has a 'Draft' status. The 'Track Location' column is empty, and the 'Delete Transfer' column contains a red 'X' icon.

Edit/View	Status	Type	Order Number	Requested Item	Transfer Source	Requested Quantity	Received Amount	Track Location	Retract Transfer	Delete Transfer	Copy Transfer
	Draft	Internal	TRN-20-430	Mouse - (Mer-Mer-Cre) Gk	Internal	1	0				

There is no longer an icon in the **Track Location** column, and an icon is populated in the **Delete Transfer** column. Click the icon in the **Delete Transfer** column to delete the draft transfer request. As shown below, a confirmation popup displays.

Confirm the Deletion.
Are you sure you want to delete?

Click the **CANCEL** button to close the popup without deleting the request.

Click the **CONFIRM** button to delete the request and close the popup.

Receiving Study Signoff and Approval

The PI on the study to which the selected animal(s) are to be transferred receives a home page task to either accept or deny the transfer request.

The screenshot shows the 'Studies Submission Status - In Progress' interface. It features a search bar and a table of submission records. Below the table, a workflow diagram illustrates the submission process: Pre-Submission leads to Pre-Review, which can lead to Post-Review or Changes-Requested. Changes-Requested leads back to Pre-Review. Post-Review leads to Modification-Requested, which leads back to Pre-Review. A task list below the diagram shows a 'Pre-Submission' task with a 'Retract Submission' button and dates for creation and completion.

Click to open Study Dashboard	Reference Number	Form Name	Study Title	Form Author	Date Submitted	Actions
	IAC-20-2474-TRANS-1.0	Animal Resource Internal Transfer Form	Test 238283 (Strain 5)	Mather, Ann J, Dr.	09/25/2020 10:21 AM PDT	

Task Status	Task Action/Details	Task Name	Date Created	Date Completed
		Pre-Submission	09/25/2020 10:18 AM PDT	09/25/2020 10:26 AM PDT

From here the receiving PI can view transfer request tracking and status information by expanding the task, as shown above.

The receiving PI clicks the icon in the **Click to open Study Dashboard** column to open the request and indicate approval or denial. The receiving PI can deny the request, approve the request with proposed changes, or approve the request as-is.

If the receiving PI denies the internal transfer request, the requesting study is notified of the denial and the request is moved back to a Draft status so that the study can make changes to the request and resubmit it, if desired

If the receiving PI approves the internal transfer request as-is, the animals specified in the request are immediately removed from the **Animal Management** tab of the sending study and added to the receiving study's **Animal Management** tab, with the location specified in the request, as demonstrated in the screenshot below

The screenshot displays the 'Animal Management' interface. At the top, it shows 'My Workspaces' with 'IACUC Number: IACUC-2018-1655' and 'Alias: Test for Animal Transfer'. The user is identified as 'Study Assistant' and the current tab is 'Animal Management'. The 'Study Status' is 'Approved' and the 'Study Title' is 'Copy of Test for Animal Transfer'. A sidebar on the left contains navigation options: 'Space Management', 'Animal Orders', 'Cage Management', 'Animal Details', 'Animal Records', 'Animal Progression', 'Animal Breeding', and 'Forms'. The main area features search filters for Species, Strain, Sex, Life Status, Date of Birth Range, Generation, Cage ID, Facility, Building, Room, Animal ID#, Animal Tag Number, and Origin. Below the filters, a table displays '93 result(s) found...'. The table columns include a status icon, status (e.g., 'Alive'), sex ('Rouse'), name ('Her-Cre-Rer'), Cre, IACUC ID (e.g., 'IACUC-2018-1655_M_00082'), sex ('Male'), facility ('VMU'), building ('445'), room ('VMU'), IACUC ID (e.g., 'IACUC-2018-1655_00012'), and transfer type ('Internal Transfer').

If the receiving PI approves the internal transfer request with proposed changes, the request goes back to the sending PI, who receives a home screen task to review and optionally accept the proposed changes

The sending PI can retract the submission, make further revisions and resubmit the request to the receiving PI, or signoff to approve the proposed changes. *Note that the request can be routed back and forth between the sending and receiving PI for numerous rounds of revision from each side before receiving final approval or denial.*

If the sending PI signs off to approve the receiving PI's proposed changes, the animals specified in the request are immediately removed from the **Animal Management** tab of the sending study and added to the receiving study's **Animal Management** tab, with the location specified in the request, as demonstrated in the screenshot below.

My Workspaces | IACUC Number: **IACUC-2018-1655** | Study Assistant | **Animal Management** | [Back](#)

Study Status: **Approved** | Study Title: Copy of Test for Animal Transfer

Submissions | **Study Management** | **Animal Management**

Space Management | Animal Orders | **Cage Management** | Animal Details | Animal Records | Animal Progression | Animal Breeding | Forms

Species: All | Strain: All | Sex: All | Life Status: All | Date of Birth Range: [] - [] | Generations: All | Cage IDs: All | Facility: All | Building: All | Room: All | Animal ID: [] | Animal Tag Number: [] | Origin: All | [Find](#)

93 result(s) found...

Image	Status	Species	Strain	Sex	Age	Order Code	Requested Item	Requested Quantity	Received Amount	Recurring Order	Track Location	Retract Order	Delete Order	Copy Order
	Alive	Mouse	(Mer-Cre-Rer) Cre	Male		IACUC-2018-1655_M_00082	Mouse	20	0	<input type="checkbox"/>				
	Alive	Mouse	(Mer-Cre-Rer) Cre	Male		IACUC-2018-1655_M_00083	Mouse	20	0	<input type="checkbox"/>				
	Alive	Mouse	(Mer-Cre-Rer) Cre	Male		IACUC-2018-1655_M_00084	Mouse	20	0	<input type="checkbox"/>				
	Alive	Mouse	(Mer-Cre-Rer) Cre	Male		IACUC-2018-1655_M_00085	Mouse	20	0	<input type="checkbox"/>				
	Alive	Mouse	(Mer-Cre-Rer) Cre	Male		IACUC-2018-1655_M_00086	Mouse	20	0	<input type="checkbox"/>				

External Transfer Order

The study PI uses an external transfer order request to order subject animals for their own study from among the animals allocated to a different (external/sending) study. This type of request requires approval from both the internal/requesting study PI and the Transfer Coordinator for the applicable board of the external/sending study before the animals are released to the requesting study.

When the request is approved, this type of animal order is managed and tracked via the board side **Orders** page (Animal Resource Center > Orders) in the same manner as for animals ordered from an outside vendor, though the “vendor” in this case is another study.

Receiving Study Transfer Request

With the study that is requesting the animals (the receiving study) open on the study side (Find a Study > [open]), click the **Animal Management** tab (shown below).

My Workspaces | IRB Number: **IRB-20-7307** | Study Assistant | **Animal Management** | [Back](#)

Study Status: **Active** | IRB Number: IRB-20-7307 | Study Title: Test for 23004 -712020

Submissions | **Study Management** | **Animal Management**

Space Management | **Animal Orders** | Animal Ordering | Animal Transfer | Cage Management | Animal Details | Animal Breeding | Forms

Approved Animals

Species: Mouse Strain: (Mer-Mer-Cre) Gk Stock #/Order Code: Sex: Male Age: Breeding: USDA: No	Species: Mouse Strain: 1-alpha Hase KO Stock #/Order Code: Sex: Male Age: Breeding: USDA: No
---	--

Order Tally

Species: Mouse

Total Approved: 500
Total Pending: 20
Total On Study: 23
Total Available: 457

2 result(s) found...

Edit/View	Status	Order Number	Requested Item	Requested Quantity	Received Amount	Recurring Order	Track Location	Retract Order	Delete Order	Copy Order
	New Request	ORD-20-817	Mouse - 1-alpha Hase KO	20	0	<input type="checkbox"/>				
	Completed	ORD-20-814	Mouse - (Mer-Mer-Cre) Gk	8	8	<input type="checkbox"/>				

In the left hand sidebar (shown above), the **Animal Ordering** tab is selected by default. Click the **Animal Transfer** tab to open the **Animal Transfer** panel, shown below.

The screenshot shows the 'Animal Management' interface. At the top, there is a header with 'My Workspaces', 'Study Assistant', and 'Animal Management'. Below this, there are tabs for 'Submissions', 'Study Management', and 'Animal Management'. The 'Animal Management' tab is active, showing a sidebar with options like 'Space Management', 'Animal Orders', 'Animal Ordering', 'Animal Transfer', 'Cage Management', 'Animal Details', 'Animal Breeding', and 'Forms'. The main content area displays 'Approved Animals' with two columns of animal details, an 'Order Tally' bar chart, and a table for 'Animal Transfer'. The 'Add a New Transfer' button is highlighted in a red box.

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 (red box in screenshot above). The **Transfer Type Selection** popup loads, as shown below.

The 'Transfer Type Selection' popup dialog is shown. It has a title bar with 'Transfer Type Selection:' and a close button. The main content area contains a green plus icon followed by the text 'Please select the transfer type:'. Below this, there are two radio buttons: 'Internal Transfer' and 'External Transfer'. At the bottom right, there is a 'Continue' button.

Click to select the radio button for **External Transfer** and click the **Continue** button.

The 'Transfer Type Selection' popup dialog is shown again, but now the 'External Transfer' radio button is selected, indicated by a blue dot. The 'Continue' button remains at the bottom right.

The **Processing Animal Order Request** page appears as shown on the following page of this manual when initially opened.

My Workspaces **IBB Number: IBB-20-2302** Study Assistant **Animal Resource Center External Transfer Form (Version 1.0)** [Back](#)

Study History: **Active** IBB Number: IBB-20-2302 Study Title: Test for 23004-171000 [Save Form](#)

Animal Import Request

Transfer Number: *Generated on Save

Order Status: **Final**

*Request Date: 06/27/2018

*Date of Proposed Transfer: []

Requested Animals:

*Requested Species: []

*Requested Strain: []

Total Approved Animals: 0

Total Available Animals: 0

*Stock #/Order Code: []

*Age/Size: []

*Health Status:
 SPF Conventional
 Immune Compromised Wild-caught
 Germ-free

*Unique Anatomical Features/Phenotypes: []

Special Care: []

Special Conditions: []

*Breeding: Yes No

*Number of Requested Males: []

*Number of Requested Females: []

	B	C	B*	B*
*Number of Animals per Approved Pain Category:	[0]	[0]	[0]	[0]

Originating Facility:

*Institution or Company Name: []

PHS Assurance Number (if applicable): []

Animal Transfer Coordinator:

*Name: []

*Phone Number: []

Fax Number: []

*Email: []

Investigator Information:

*Name: []

*Phone Number: []

Fax Number: []

*Email: []

*Protocol Number/Title: []

*Approval Date: []

*Expiration Date: []

Contact(s) (Lab/Project/Vivarium/Co-PI, etc.): []

Veterinarian Information:

*Name: []

*Phone Number: []

Fax Number: []

*Email: []

*Originating Facility Mailing Address: []

Destination Facility:

Veterinarian Information:

*Name: []

*Phone Number: []

Fax Number: []

*Email: []

Animal Transfer Coordinator:

*Name: []

*Phone Number: []

Fax Number: []

*Email: []

*Destination Facility Mailing Address: []

*Number of Cages: []

Cage Type	Facility	Building	Floor	Room	No Available Rooms Space	No Available after receipt	Number of Males	Number of Females	Total
No cages have been entered.									

Funding:

Federal PI #: []

Federal (Upload Document): []

Foundation (Enter PI #): []

Regulation (Enter Regulation #): []

Charge Account:

*Order Charge Account: []

*Housing Charge Account: []

Do you want to accept any additional animals that may be received (over the amount ordered)?

Yes No

Because the page is lengthy, for the remainder of this manual section portions of the page are shown in isolation.

The top section of the page is shown below.

My Workspaces | IIRB Number: **IRB-20-7307** | Study Assistant | **Animal Resource Center External Transfer Form - (Version 1.0)** | Back

Study Status: **Active** | IIRB Number: IRB-20-7307 | Study Title: Test for 23004 -712020

Save Form

Animal Import Request

Transfer Numbers: <Generated on Save>

Order Status: **Draft**

* Request Date: 09/27/2020

* Date of Proposed Transfer:

Requested Animals:

Requested Species: <--000-->

* Requested Strain: <--000-->

Total Approved Animals: 0

Total Available Animals: 0

* Stock #/Order Code:

* Age/Size:

* Health Status: SPF Conventional Immune Compromised Wild-caught Germ-free

* Unique Anatomical Features/Phenotype:

Special Care:

Special Conditions:

* Breeding: Yes No

* Number of Requested Males: 0

* Number of Requested Females: 0

B	C	D*	E*
0	0	0	0

Complete the top section as follows.

Request Date defaults to the current date, but the field is editable. To change the date, click the calendar icon to open the calendar widget. Navigate to the desired date and click to select it.

Click the calendar icon for **Date of Proposed Transfer** to open the calendar widget. Navigate to the desired date and click to select it.

Dropdown pick lists are provided for selection of **Species** and **Strain**. Note that the **Strain** picklist does not populate until a **Species** is selected, and only approved **Species** are available for selection. These lists are maintained under Review Board Administration > List Maintenance. See the ARC List Maintenance Manual for more information.

Total Approved Animals and total **Available Animals** fields populate automatically based on **Species** and **Strain** selections, and are read only.

Enter the applicable **Stock # / Order Code** and **Age / Size**.

Click the applicable radio button to select the desired **Health Status**.

Enter **Unique Anatomical Features / Phenotype**, **Special Care** and **Special Conditions** details.

Click the “Yes” or “No” radio button to specify the desired **Breeding** status of the animals being requested.

Enter the **Number of Requested Males** and **Number of Requested Females**. *Note that the sum of the two numbers must not exceed either the **Number of Approved Animals** or the **Number of Available Animals**.*

Enter the **Number of Animals per Approved Pain Category** in the grid at the bottom of the section. *Note that the sum of the four field entries must exactly match the sum of **Number of Requested Males** and **Number of Requested Females**.*

The next section is **Originating Facility**, shown below.

Originating Facility:

*Institution or Company Name:

PMS Assurance Number (if applicable):

Animal Transfer Coordinator:

*Name:

*Phone Number:

Fax Number:

*Email:

Investigator Information:

*Name:

*Phone Number:

Fax Number:

*Email:

*Protocol Number/Title:

*Approval Date:

*Expiration Date:

Contact(Lab/Project/Vivarium/Co-PI, etc.):

Veterinarian Information:

*Name:

*Phone Number:

Fax Number:

*Email:

*Originating Facility Mailing Address:

No default values are pre-filled in this section. Complete the section as follows, bearing in mind that all items pertain to the facility *from which animals are being requested*.

In the **Animal Transfer Coordinator** area, enter the **Name**, **Phone Number**, **FAX Number** (if any) and **Email** address of the Coordinator.

In the **Investigator Information** area, enter the **Name**, **Phone Number**, **FAX Number** (if any) and **Email** address of the Investigator. Enter the **Protocol Number/Title**.

Click the calendar icon for **Approval Date** to open the calendar widget. Navigate to the desired date and click to select it. Repeat this process for **Expiration Date**.

Enter the **Contact(Lab/Project/Vivarium/Co-PI, etc.)** name.

In the **Veterinarian Information** area, enter the **Name**, **Phone Number**, **FAX Number** (if any) and **Email** address of the Veterinarian, as well as the **Originating Facility Mailing Address**.

The next section is **Destination Facility**, shown below.

Destination Facility:

Veterinarian Information:

*Name:

*Phone Number:

Fax Number:

*Email:

Animal Transfer Coordinator:

*Name:

*Phone Number:

Fax Number:

*Email:

*Destination Facility Mailing Address:

*Number of Cages:

* Cage Type:	* Facility:	* Building:	Floor:	* Room:	% Available Rooms Space:	% Available after receipt:	* Number of Males:	* Number of Females:	Total:
No Cages have been entered.									

Complete the section as follows, bearing in mind that all items pertain to the facility which is *requesting the animals*.

In the **Veterinarian Information** area, enter the **Name**, **Phone Number**, **FAX Number** (if any) and **Email** address of the Veterinarian. Note that these fields default to Veterinarian details previously entered for the requesting study (if any), but all fields remain editable.

In the **Animal Transfer Coordinator** area, enter the **Name**, **Phone Number**, **FAX Number** (if any) and **Email** address of the Coordinator, as well as the **Destination Facility Mailing Address** and **Number of Cages**.

The **Proposed Location** table is where the study specifies where it intends to house the animals being requests. Table fields are unlocked when a **Number of Cages** is entered.

An **All** button populates in the column headers for **Cage Type** and **Facility**, as demonstrated in the screenshot below. These buttons are used to apply the same selection for the indicated item to all records listed in the table, but individual selections can be made in the table fields below as well.

*Number of Cages: 2

* Cage Types:	* Facility:	* Building:	Floor:	* Rooms:	% Available Rooms Space:	% Available after receipt:	* Number of Males:	* Number of Females:	Total:
All	All								
Mouse Cage	--none--	--none--	--none--	--none--	-	-	0	0	0
Mouse Cage	--none--	--none--	--none--	--none--	-	-	0	0	0
							0	0	0

Click the **All** button for **Cage Type** to open the **Define Cage Type for all Cages** popup, as shown below. Click in the **Cage Type** field to open a dropdown pick list and click an item in the list to select it.

Transfer Coordinator:

*Name: Transfer Coordinator, Ann

*Phone Number: 213-696-4444

Fax Number:

*Email: atc@osu.edu

28526 Monroe Blvd.
2nd Floor
San Gabriel, CA 91874

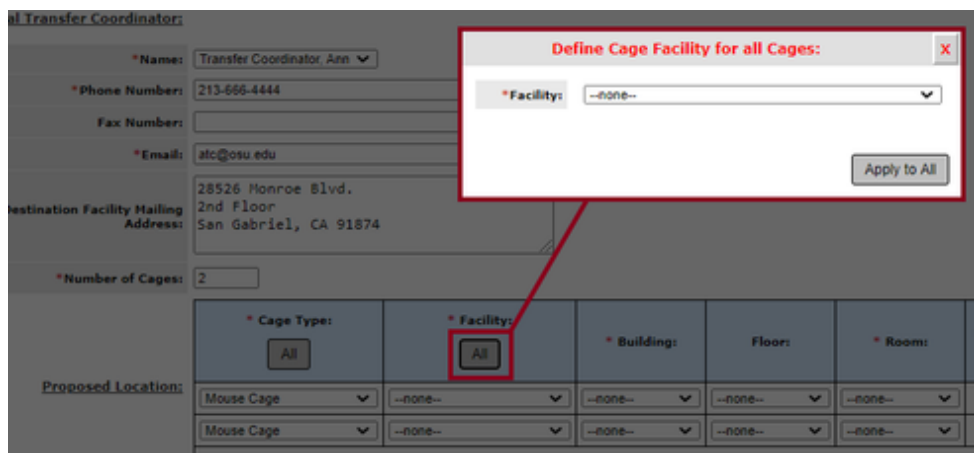
Destination Facility Mailing Address:

*Number of Cages: 2

Proposed Location:

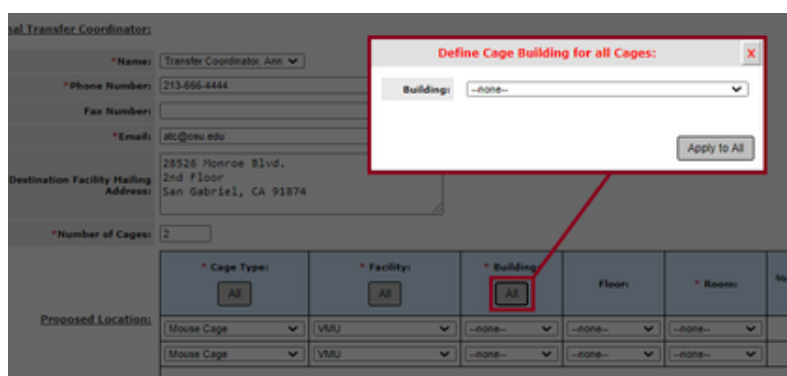
* Cage Type:	* Facility:	* Building:	Floor:	* Rooms:	%
All	All				
Mouse Cage	--none--	--none--	--none--	--none--	
Mouse Cage	--none--	--none--	--none--	--none--	

Click the **Apply to All** button to save the selection. As shown below, the selection is applied to all records in the table.



Click the **All** button for **Facility** to open the **Define Cage Facility for all Cages** popup, as shown above. Click in the **Facility** field to open a dropdown pick list and click an item in the list to select it. Click the **Apply to All** button to save the selection.

As shown below, the selection is applied to all records in the table and an **All** button populates in the **Building** column.



Repeat the selection process for **Floor** and **Room**. An example of the completed table is shown below.

*Number of Cages:

* Cage Type:	* Facility:	* Building:	Floor:	* Rooms:	% Available Rooms Space:	% Available after receipt:	* 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"/>	<input type="button" value="All"/>					
Mouse Cage	VMU	VMU	6	445	0%	Exceeds space	0	0	0
Mouse Cage	VMU	VMU	6	445	0%	Exceeds space	0	0	0
							0	0	0

Notice that the values in the **% Available Rooms Space** and **% Available after receipt** fields auto-populate as cage details are entered or revised.

As demonstrated below, the **Total** column auto-populates when **Number of Males** and **Number of Females** values are entered or revised.

*Number of Cages:

* Cage Type:	* Facility:	* Building:	Floor:	* Room:	% Available Rooms Space:	% Available after receipt:	* Number of Males:	* Number of Females:	Total:
All	All	All	All	All					
Proposed Location:									
Mouse Cage	VMU	VMU	6	445	0%	Exceeds space	<input type="text" value="10"/>	<input type="text" value="0"/>	10
Mouse Cage	VMU	VMU	6	445	0%	Exceeds space	<input type="text" value="0"/>	<input type="text" value="10"/>	10
							10	10	20

The next section is **Funding**, shown below.

*Funding:

Federal PO #:

Federal (Upload Document):

Drag your file here or click in this area.

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

Foundation (Enter PO #):

Requisition (Enter Requisition #):

Charge Account:

*Order Charge Account:

*Housing Charge Account:

Do you want to accept any additional animals that may be received (over the amount ordered)?

Yes No

Note that the **Requisition**, **Order Charge Account** and **Housing Charge Account** fields are required. An error message will display if the record is saved with any data missing.

Complete the **Federal PO #**, **Foundation (Enter PO #)** and **Requisition (Enter Requisition #)** fields.

To upload supporting documentation click in the **Federal (Upload Document)** dotted line box, or drag the desired file (in MS Word, Rich Text or PDF format) from the computer desktop or file manager to the dotted line box, and follow the provided prompts to complete the upload. Details of any uploaded documents are added to the list beneath the upload field. Each item added has an associated icon in the **Delete** column. If any documents are uploaded in error, click the applicable **Delete** icon to delete.

Dropdown picklists are provided for selection of **Order Charge Account** and **Housing Charge Account**. *Note that these are required fields, the form cannot be saved if they are left blank.*

Select "Yes" or "No" for **Do you want to accept any additional animals that may be received (over the amount ordered)?**

When all data is entered, scroll back to the top of the page and click the **Save Form** button (shown below).

My Workspaces IRB Number: **IRB-20-7307** Study Assistant Animal Resource Center External Transfer Form (Version 1.0) [Back](#)

Study Status: **Active** IRB Number: IRB-20-7307 Study Title: Test for 23004 -712020

Animal Import Request

Transfer Number: <Generated on Save>

Order Status: **Draft**

*Request Date: 09/21/2020

*Date of Proposed Transfer:

An example of the filled form is demonstrated on the next page of this manual.

My Workspaces **IRB Number: IRB-20-7307** Study Assistant **Animal Resource Center External Transfer Form - (Version 1.0)** [Back](#)

Study Status: **Active** IRB Number: IRB-20-7307 Study Title: Test for 23004-712020

Save Form

Animal Import Request

Transfer Number: <Generated on Save>
 Order Status: **Final**
 *Requested Date: 09/28/2020
 *Date of Proposed Transfer: 09/28/2020

Requested Animals:

Requested Species: Mouse
 *Requested Strain: Mice-Mer-Cre; Gt
 Total Approved Animals: 500
 Total Available Animals: 456
 *Stock #/Order Code: 000-0042
 *Age/Size: 8wk / 2g
 *Health Status: SPF Conventional
 Immune Compromised 80% caught
 Germ-free
 *Unique Anatomical Features/Phenotypic: N/A
 Special Care: None
 Special Conditions: None
 *Breeding: Yes No
 *Number of Requested Males: 10
 *Number of Requested Females: 10
 *Number of Animals per Approved Poin Category:

B	C	B*	B*
20	0	0	0

Originating Facility:

*Institution or Company Name: OHSU Research
 PHS Assurance Number (if applicable):
Animal Transfer Coordinator:
 *Name: Umair Pymah
 *Phone Number: 503-555-8388
 Fax Number:
 *Email: u.pymah@ohsu.edu
Investigator Information:
 *Name: Hannah Forsyth, PhD
 *Phone Number: 503-555-9999
 Fax Number:
 *Email: hannahfors@ohsu.edu
 *Protocol Number/Title: M0UC-20-0015
 *Approval Date: 09/08/2020
 *Expiration Date: 11/30/2021
 Contact(Lab/Project)/Phonum/Ce: PI, etc.): Lyda Ross
Veterinarian Information:
 *Name: James Harris, DVM
 *Phone Number: 503-777-6666
 Fax Number:
 *Email: jharris@ohsu.edu
 *Originating Facility Mailing Address: 3192 Live Oak Dr Ste 101 Building 2 Los Angeles, CA 90068

Destination Facility:

Veterinarian Information:
 *Name: Elvira Deborah
 *Phone Number: 503-555-9999
 Fax Number:
 *Email: edebor@ohsu.edu
Animal Transfer Coordinator:
 *Name: Transfer Coordinator Jim
 *Phone Number: 503-555-4444
 Fax Number:
 *Email: jim@ohsu.edu
 *Destination Facility Mailing Address: 28326 Ramrod Rd. 2nd Floor San Gabriel, CA 91874
 *Number of Cages: 2

Proposed Location:

* Cage Type:	* Facility:	* Building:	* Floor:	* Room:	% Available Room Space:	% Available after receipt:	* Number of Males:	* Number of Females:	Total:
Mouse Cage	VMU	VMU	0	405	0%	Exceeds space	10	0	10
Mouse Cage	VMU	VMU	0	405	0%	Exceeds space	0	10	10
							10	10	20

*Funding: 47399000-221-0923-7811

Federal (Upload Document):
 Drag your file here or click in this area.

Delete	Name	Date	View the Document
	Veterinary_Chart.pdf	09/28/2020	

Foundation (Enter PID #):
 Requisition (Enter Requisition #):
 *Order Charge Account: (Copy Cost Center Name | M0UC) |
 *Mailing Charge Account: (Copy Cost Center Name | M0UC) |

Do you want to accept any additional animals that may be received (over the amount ordered)?
 Yes No

As shown below, the **Form Has Been Completed Screen** opens.

Click the **Exit Form** button to close the page to save the transfer request as a draft.

Click the **Return to Form** button to close the page and return to the **External Transfer Form** page to make revisions to the transfer request.

Click the **Signoff and Submit** button to continue processing of the transfer request. As shown below, a countdown popup displays to warn that signoff is required to continue processing.

When the countdown popup closes, the **Submission Routing Signoff** page opens, as shown below.

Click to select the **Approve** radio button and click the **Save Signoff** button to complete submission of the transfer request.

Back on the **Animal Transfer** tab of the study, an entry for the transfer request is added in the **Animal Transfer** section.

My Workspaces | IACUC Number: **IACUC-2018-1655** | Study Assistant | **Animal Management** | Back

Study Status: **Approved** | Study Title: Copy of Test for Animal Transfer

Submissions | Study Management | **Animal Management**

Space Management | **Animal Orders** | Animal Ordering | Animal Transfer | Cage Management | Animal Details | Animal Breeding | Forms

Approved Animals

Species: Mouse	Species: Mouse
Strain: (Mer-Cre-Mer) Cre	Strain: (Mer-Cre-Mer) Cre
Stock #/Order Code: 44	Stock #/Order Code: 44
Sex: Male	Sex: Male
Age: 2	Age: 2
Breeding: Yes	Breeding: Yes
USDA: No	USDA: No

Order Tally

Species: Mouse	Total Approved: 400
400 Approved	Total Pending: 136
136 Pending	Total On Study: 81
283 Available	Total Available: 183

Animal Transfer | Add a New Transfer

4 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
	New Request	External	TRN-20-431	Mouse - (Mer-Cre-Mer) Cre	ORU Research	20	0				
	New Request	Internal	TRN-20-391	Mouse - (Mer-Cre-Mer) Cre	Internal	10	0				
	New Request	Internal	TRN-20-390	Mouse - (Mer-Cre-Mer) Cre	Internal	6	0				
	New Request	Internal	TRN-20-389	Mouse - (Mer-Cre-Mer) Cre	Internal	10	0				

Click the icon in the **Edit/View** column to open a read only copy of the request.

Click the icon in the **Copy Transfer** column to open a *copy* of the request for editing, in order to create a new transfer request based on the existing one.

Click the icon in the **Track Location** column to view tracking location details, as shown below.

My Workspaces | IRB Number: **IRB-20-7307** | Study Assistant | **Workflow - Submission Tracking** | Back

Print Friendly

Pre-Submission

Task Status	Task Action/Details	Task Name	Date Created	Date Completed
	Pre-Submission		09/27/2020 09:28 PM PDT	

Retract Submission

At this stage of processing, before the external Transfer Coordinator has approved and signed off on the transfer request, a **Retract Submission** button is available (red box in screenshot above). Click the button to retract the submission, thereby withdrawing the transfer request. As shown below, back on the **Animal Transfer** tab, the transfer request record is reverted to draft. Click the icon in the **Edit/View** column to open the draft request for revision and further processing.

My Workspaces | IRB Number: **IRB-20-7307** | Study Assistant | **Animal Management** | Back

Study Status: **Action** | IRB Number: IRB-20-7307 | Study Title: Test for 23004 -712020

Submissions | Study Management | **Animal Management**

Space Management | **Animal Orders** | Animal Ordering | Animal Transfer | Cage Management | Animal Details | Animal Breeding | Forms

Approved Animals

Species: Mouse	Species: Mouse
Strain: (Mer-Mer-Cre) GK	Strain: 1-alpha h ² ase KO
Stock #/Order Code: 44	Stock #/Order Code: 44
Sex: Male	Sex: Male
Age: 2	Age: 2
Breeding: No	Breeding: No
USDA: No	USDA: No

Order Tally

Species: Mouse	Total Approved: 500
500 Approved	Total Pending: 21
21 Pending	Total On Study: 23
456 Available	Total Available: 456

Animal Transfer | Add a New Transfer

2 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
	Draft	External	TRN-20-430	Mouse - (Mer-Mer-Cre) GK	External	20	0				

There is no longer an icon in the **Track Location** column, and an icon is populated in the **Delete Transfer** column. Click the icon in the **Delete Transfer** column to delete the draft transfer request. As shown below, a confirmation popup displays.

Confirm the Deletion.

Are you sure you want to delete?

CONFIRM CANCEL

Click the **CANCEL** button to close the popup without deleting the request.

Click the **CONFIRM** button to delete the request and close the popup.

External Transfer Coordinator Signoff and Approval

The Transfer Coordinator for the study from which the selected animal(s) are to be transferred receives a home page task to either accept or deny the transfer request, as shown below.

Click to open	Task Type	Received	Description
<input type="checkbox"/>	Animal Transfer Coordinator Signoff	09/28/2020 03:08 PM PDT	Animal Resource Center External Transfer Form review: transfer request as the select Transfer Coordinator: Ann Transfer Coordinator, M.D.
<input type="checkbox"/>	Animal Transfer Coordinator Signoff	03/16/2019 10:37 AM PDT	Animal Resource Internal Transfer Form review transfer request as the select Transfer Coordinator: Ann Transfer Coordinator, M.D.
<input type="checkbox"/>	Annual Conflict of Interest Lapse	09/04/2016 04:33 PM PDT	Lapse 3 Day for Ann Transfer Coordinator, M.D. with the renewal date of 09/03/2016
<input type="checkbox"/>	Failure to submit Annual Conflict of Interest	09/02/2016 04:30 PM PDT	Annual COI Failure to Submit Notification for Ann Transfer Coordinator, M.D. with the renewal date of 09/03/2016
<input type="checkbox"/>	Annual Conflict of Interest Lapse	09/02/2016 04:30 PM PDT	Lapse 1 Day for Ann Transfer Coordinator, M.D. with the renewal date of 09/03/2016

The Transfer Coordinator clicks the icon in the **Click to open** column to open the request in the **Submission Routing Signoff** page (shown below) and indicate approval or denial.

My Workspaces Special Purpose Submission Forms **Submission Routing Signoff** Back Save Signoff

Study Title: Copy of Test for Animal Transfer
Submission Reference Number:

Request Information: **+**

Special Conditions for Approval:

- None Ok to Vivarium
- Quarantine
- 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 Terminated, Will Use be Terminated? Yes No

If Terminated, 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: Containment Reservation

Drag your file here or click in this area.

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

In a HTA Required: Yes No

Save Signoff

The Transfer Coordinator can review full **Request Information** details by clicking the plus sign icon for that item (indicated by the red arrow in the screenshot above).

Full **Request Information** displays as shown below. *Note that the information shown is read-only, the Transfer Coordinator cannot change details of the request before approving it.*

The Transfer Coordinator completes the signoff panel (shown in screenshot below) as follows:

Click to select applicable checkboxes for any desired **Special Conditions for Approval**. If the **Other** checkbox is selected, complete the **Describe other choice** field.

Click to select the “Yes” or “No” radio button for **Will Use of Animals be Experimental?** If “Yes” is selected, complete the **If yes, How long will they be Housed?** field.

Click to select the “Yes” or “No” radio button for **If Terminal, Will Use be Terminal?**

Click to select the “Yes” or “No” radio button for **If Terminal, Have Personnel been Trained?**

Click in the dotted line box, or drag any desired supporting **Health Information** document in MS Word, Rich Text or PDF format from the computer desktop or file manager into the dotted line box, and follow the prompts to upload the file. Details of any uploaded documents are added to the list beneath the upload field. Each item added has an associated icon in the **Delete** column. If any documents are uploaded in error, click the applicable **Delete** icon to delete.

When the signoff panel fields are complete, the Transfer Coordinator clicks the applicable radio button to **Approve** or **Deny** the request, then clicks the **Save Signoff** button to save the signoff.

If the Transfer Coordinator denies the request, the requesting study is notified of the decision and the request status is changed to Denied in the Animal Transfer tab of the requesting study. No further processing can occur on a Denied transfer request.

If the Transfer Coordinator approves the request, a draft order is generated for the requested animals. In the requesting study, status of the request on the **Animal Management > Animal Transfer** tab is unchanged (demonstrated in the screenshot below).

The screenshot shows the 'Animal Management' interface. At the top, it displays 'My Workspaces' with 'IACUC Number: IACUC-2018-1655' and 'Study Assistant' role. The 'Study Status' is 'Approved' and the 'Study Title' is 'Copy of Test for Animal Transfer'. The left sidebar includes 'Space Management', 'Animal Orders', 'Animal Ordering', 'Animal Transfer' (selected), 'Cage Management', 'Animal Details', 'Animal Breeding', and 'Forms'. The main area shows 'Approved Animals' details for a Mouse (Strain: (Mer-Cre-Mer) Cre, Stock #/Order Code: 44, Sex: Male, Age: 2, Breeding: Yes, USDA: No). An 'Order Tally' chart shows 400 Total Approved, 136 Total Pending, 81 Total On Study, and 183 Total Available. Below the chart is a table of animal transfer requests with 4 results found. The first row is highlighted with a red box.

Edit/View	Status	Type	Order Number	Requested Item	Transfer Source	Requested Quantity	Received Amount	Track Location	Retract Transfer	Delete Transfer	Copy Transfer
	New Request	External	TRN-20-431	Mouse - (Mer-Cre-Mer) Cre	OMU Research	20	0				
	New Request	Internal	TRN-20-391	Mouse - (Mer-Cre-Mer) Cre	Internal	10	0				
	New Request	Internal	TRN-20-390	Mouse - (Mer-Cre-Mer) Cre	Internal	6	0				
	New Request	Internal	TRN-20-389	Mouse - (Mer-Cre-Mer) Cre	Internal	10	0				

This is because the order has not yet been placed, though approval to place the order has been given by the Transfer Coordinator.

Animal Order Processing

The draft order is processed under ARC > Orders (red box in screenshot below).

The screenshot shows the 'ARC Orders' interface. At the top, it displays 'My Workspaces' with 'ARC' and 'Orders' tabs. The 'Find an Order Filters' section includes 'Form Types' (Animal Resource Center Ext.), 'Species', 'Principal Investigator', and 'Display Orders by Facility' (All). Below the filters are tabs for 'Approved for Ordering', 'Pending Approval', 'Pending Orders to Vendor', 'In Progress Orders', 'Quarantine', and 'Completed'. The main area shows 14 results found. The last row is highlighted with a red box.

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Total Requested	Date Board Received
	New Request	IACUC-2019-2023	TRN-19-271	Animal Resource Center External Transfer Form	Animal Housing Facility	admin, Admin Admin	Dog - lab	6	
	New Request	test 15953	TRN-19-277	Animal Resource Center External Transfer Form	Animal Housing Facility	admin, Admin Admin	Dog - lab	4	
	New Request	Study Non required B	IACUC-2020-2358	Animal Resource Center External Transfer Form	Animal Housing Facility	admin, Admin Admin	Mouse - (Mer-Cre-Mer) Cre	4	
	New Request	Copy of Test for Animal Transfer	IACUC-2018-1655	Animal Resource Center External Transfer Form	VMU	Mather , Ann J, Dc	Mouse - (Mer-Cre-Mer) Cre	20	09/28/2020 03:52:55 PM PDT

Click the icon in the **Open** column for the applicable transfer request to open it in the **Processing Animal Order Request** page (shown in screenshot below).

Read-only versions of the original **Request Information**, **Approval for [requester name]** with the role of **Submitter** approval details, and **Approval for [Transfer Coordinator name]** with the role of **Transfer Coordinator** details can be expanded by clicking the respective plus sign icons to the left of each section.

My Workspaces SACUC Number: **IACUC-2018-1655** ARC Processing Animal Order Request [Back](#)

Study Status: **Approved** Study Title: Copy of Test for Animal Transfer

Order Information Save Order Deny Order Process Order

Request Information:
 Approval for Admin Admin admin with the role of Submitter:
 Approval for Ann Transfer Coordinator, M.D. with the role of Transfer Coordinator:

*Order Date:
 *Expected Delivery Date:
 Confirmation Number:
 Requisition Number:

Order Animals:
 Species: Mouse
 Strain: (Mm.Cre.Mer) Cre
 *Stock #/Order Code: 68
 *Age/Size: 3 wks 2g
 *Number of Males Ordered: 10
 *Number of Females Ordered: 10
 *Number of Cages: 2

* Cage Type:	* Facility:	* Building:	Floor:	* Room:	% Available Rooms Space:	% Available after receipt:	* Number of Males:	* Number of Females:	Total:
Mouse Cage	VNU	VNU	6	445	0%	Exceeds space	10	0	10
Mouse Cage	VNU	VNU	6	445	0%	Exceeds space	0	10	10
							10	10	20

Click the icon for **Order Date** to open the calendar widget for that field. Navigate to the desired date in the widget and click to select it.

Click the icon for **Expected Delivery Date** to open the calendar widget for that field. Navigate to the desired date in the widget and click to select it.

Enter any applicable **Confirmation Number** and **Requisition Number**.

Notice that information from the request auto-populates in the **Order Animals** and **Approved Location** sections of the page, but these fields are editable.

In the screenshot below, the signoff panel is complete.

My Workspaces SACUC Number: **IACUC-2018-1655** ARC Processing Animal Order Request [Back](#)

Study Status: **Approved** Study Title: Copy of Test for Animal Transfer

Order Information Save Order Deny Order Process Order

Request Information:
 Approval for Admin Admin admin with the role of Submitter:
 Approval for Ann Transfer Coordinator, M.D. with the role of Transfer Coordinator:

*Order Date: 09/25/2020
 *Expected Delivery Date: 09/30/2020
 Confirmation Number: CM-08/180034
 Requisition Number: 00178605

Order Animals:
 Species: Mouse
 Strain: (Mm.Cre.Mer) Cre
 *Stock #/Order Code: 68
 *Age/Size: 3 wks 2g
 *Number of Males Ordered: 10
 *Number of Females Ordered: 10
 *Number of Cages: 2

* Cage Type:	* Facility:	* Building:	Floor:	* Room:	% Available Rooms Space:	% Available after receipt:	* Number of Males:	* Number of Females:	Total:
Mouse Cage	VNU	VNU	6	445	0%	Exceeds space	10	0	10
Mouse Cage	VNU	VNU	6	445	0%	Exceeds space	0	10	10
							10	10	20

Click the **Save Order** button to save the order in a draft status without processing it.

Click the **Deny Order** button to deny the order. The requesting study PI receives a notification of this action and the status of the request is changed to "Denied" in the Animal Transfer tab requesting study.

Click the **Process Order** button to proceed approve and send the order. The external study receives a notification that the transfer request is approved and the animals are to be sent to the requesting study. As shown below, a **Receiving**

Information tab populates for the order. This is where details of the animal order (e.g., quantity and condition of animals) are entered when the animals are received.

My Workspaces IACUC Number: **IACUC-2018-1655** ARC **Processing Animal Order Request** Back

Study Status: **Approved** Study Title: Copy of Test for Animal Transfer

Order Information **Receiving Information** Save Order Process Receipt

Request Information:
 Approval for Admin Admin admin with the role of Submitter:
 Approval for Ann Transfer Coordinator, M.D. with the role of Transfer Coordinator:

*Date Received:
 *Purchase Cost:
 *Service Cost:
 *Containment OK: Yes No
 If No, Explain:

Physical Exams:
 *General Appearance: Yes No
 *Eyes, Ears, Nose, Mouth: Yes No
 *Urinary/Genital, Anus: Yes No
 *Respiratory: Yes No
 *Hydration: Yes No
 Describe all abnormalities. Report any signs of infectious disease to Animal Health Staff immediately.

On the study side, status of the order is updated to “Ordered-Pending Receipt” on the Animal Management > Animal Transfer tab (red box in screenshot below).

My Workspaces IACUC Number: **IACUC-2018-1655** Study Assistant **Animal Management** Back

Study Status: **Approved** Study Title: Copy of Test for Animal Transfer

Submissions Study Management **Animal Management**

Space 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: 44
 Sex: Male
 Age: 2
 Breeding: Yes
 USDA: No

Order Tally
 Species: Mouse
 Total Approved: 400
 Total Pending: 136
 Total On Study: 81
 Total Available: 183

Animal Transfer Add a New Transfer

4 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
	Ordered - Pending Receipt	External	TRN-20-431	Mouse - (Mer-Cre-Mer) Cre	OMU Research	20	0				
	New Request	Internal	TRN-20-391	Mouse - (Mer-Cre-Mer) Cre	Internal	10	0				
	New Request	Internal	TRN-20-390	Mouse - (Mer-Cre-Mer) Cre	Internal	6	0				
	New Request	Internal	TRN-20-389	Mouse - (Mer-Cre-Mer) Cre	Internal	10	0				

Animal Order Receipt

When the animals are received, receiving processing begins by looking up the associated order under Animal Resource Center > Orders.

My Workspaces ARC Find an Order Back

Find an Order Filters

Requisition Number:
 Order Number: TRN-20-431
 IACUC Number:
 Active: Principal Investigator:
 Vendor:

Alias:
 Order Status: All
 Date Order Placed:
 Expected Delivery Placed:

Find ...

1 result(s) found...

Open	Order Status	Requisition Number	Order Number	IACUC Number	Study Title	Principal Investigator	Vendor	Date Order Placed	Expected Delivery Date
	Ordered - Pending Receipt	BQ1298650	TRN-20-431	SACUC-2018-1655	Copy of Test for Animal Transfer Test for Animal Transfer	Wether, Ann J, Dr.		09/28/2020	09/30/2020

As shown below, **Physical Exam** section options all default to “Yes”, indicating that all items were inspected on the subject animals and found to be acceptable, but any of the values can be changed to “No” if applicable.

My Workspaces IACUC Number: IACUC-2018-1655 ARC Processing Animal Order Request Back

Study Status: Approved Study Title: Copy of Test for Animal Transfer

Order Information **Receiving Information**

Request Information:
 Approval for Admin Admin admin with the role of Submitter:
 Approval for Ann Transfer Coordinator, M.D. with the role of Transfer Coordinator:

*Date Received:

*Purchase Cost: 0.00
 *Service Cost: 0.00

*Container OK: Yes No
 If No, Explain:

Physical Exam:
 *General Appearance: Yes No
 *Eyes, Ears, Nose, Mouth: Yes No
 *Urogenital, Anus: Yes No
 *Respiratory: Yes No
 *Hydration: Yes No

Describe all abnormalities. Report any sign of infectious disease to Animal Health Staff immediately.

Comments:

Order Animals

Species: Mouse
 Strain: (Star-Cre-Het) Cre
 Stock #/Order Code: 44
 Age/Size: 3 wks/ 2g
 Number of Males Ordered: 10
 Number of Females Ordered: 10
 *Number of Males Received: 10
 *Number of Females Received: 10
 *Quarantine Required: Yes No
 *Number of Cages: 2

View Details	* Cage Type:	* Facility:	* Building:	Room:	* Rooms:	% Available Rooms Space	% Available after receipt	* Number of Males	* Number of Females	Total:	Generate Card
Approved Location:	Mouse Cage	VNU	VNU	6	445	0%	Exceeds space	10	0	10	Generate
	Mouse Cage	VNU	VNU	6	445	0%	Exceeds space	0	10	10	Generate
								10	10	20	Print All

Click the calendar icon for **Date Received** to open the calendar widget. Navigate to the desired date and click to select it.

Enter the applicable **Purchase Cost** and **Service Cost**.

Click the applicable radio button to select “Yes” or “No” for **Container OK?** If “No” is selected, complete the **If No, Explain** field.

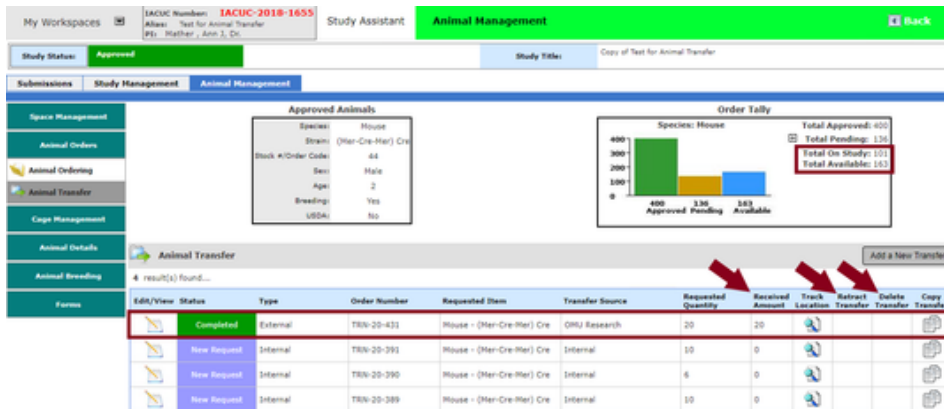
Enter desired details in the **Describe all abnormalities; Report any sign of infectious disease to Animal Health Staff immediately** and **Comments** fields.

Notice that information from the request auto-populates in the **Order Animals** and **Approved Location** sections of the page, but these fields are editable. Make any applicable changes to the fields according to the quantity of subject animals received.

Click to select the “Yes” or “No” radio button for **Quarantine Required?** If “Yes” is selected, date fields for entry of the quarantine term populate. The animals will be held in quarantine for the indicated period, and the animal order will remain in a Quarantine status during that period.

Click the **Save Order** button to save the order without completing it. *Note that animals are not released to the requesting study until the order is processed.*

Click the **Process Order** button to move the animals out of quarantine and release them to the requesting study. On the study side the order status updates to “Completed” on the **Animal Management > Animal Transfer** tab. Notice that the **Order Tally** panel and **Received Amount** field update, and no **Delete** or **Retract** icons are provided for the completed order (red arrows in screenshot below).



As shown below, individual animal records for the completed order are added to the **Animal Records** tab.

The screenshot shows the 'Animal Records' tab with 93 records found. The records are as follows:

Species	Strain	Sex	Date of Birth Range	Generation	Cage ID	Facility	Building	Room	Animal ID	Origin
House	(Mer-Cre-Mer) Cre	Male				VMU			IACUC-2018-1655_M_00082	External Transfer
House	(Mer-Cre-Mer) Cre	Male				VMU			IACUC-2018-1655_M_00083	External Transfer
House	(Mer-Cre-Mer) Cre	Male				VMU			IACUC-2018-1655_M_00084	External Transfer

Order Processing

Following initial submission packet approval, animal orders go through a series of order request, review, processing and accounting steps, with some steps completed on the study side and others on the board side. See the Animal Ordering Process Overview section of this manual for a summary of the entire processing cycle.

Approved for Ordering

Navigate to Animal Resource Center > **Orders**. The page opens to the **Approved for Ordering** tab by default, as shown below.

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Total Requested	Date Board Received
	New Request	Recessive Allele Inheritance in Mouse Coat Color IACUC-2020-2365	ORD-20-801	Animal Resource Center Order Form	Redlands	Harper, Jill Dr., MD	Mouse - 129/56	50	04/07/2020 11:32 PM PDT

“**Approved for Ordering**” means that the PI has initiated and approved the order. At this stage of processing a decision is being made as to whether or not the study is allowed to *place* an animal order. If the answer is no, the request is denied and the study is notified that no animals can be ordered. If the answer is yes, the request is approved and the study is notified it may submit an animal order.

Note that at this stage no animal order exists yet, only a request to place an animal order.

The designated board member performs a preliminary review of each request and takes one of the following actions:

approved with no changes — the board grants permission for the animal order to proceed without changes; animal management and tracking fields are unlocked on the study side

approved with changes — the board grants permission for the animal order to proceed with changes specified by the board (e.g., changes to requested quantity, sex, breeding status, etc.); animal management and tracking fields are unlocked on the study side, but the study can only proceed with the revised version of the order

denied — the board denies the animal order request; animal management and tracking fields remain locked on the study side but the study submission itself remains active

Approved requests, whether approved as is or with changes, move to the **Pending Approval** tab of the **Orders** page on the board side. The study side is notified of the change in processing status.

Denied animal order requests move to the **Completed** tab of the **Orders** page on the board side, with an assigned status of **Denied**. The study side is automatically notified of the decision.

Study Side

When the board approves a study animal order request, the **Animal Management** tab is unlocked on the study side. This is where animal orders and details of received animals are tracked.

Navigate to Study Assistant > Find a Submission / My Submissions > [submission opened] > **Animal Management** tab. The tab opens to the **Animal Ordering** area (gray tab in left-hand sidebar menu below) by default.

Study Status: **Approved** IACUC Number: IACUC 20-153 Study Title: Of Men and Mice
 IACUC Expiration Date: 12/31/2023

Submissions Study Management **Animal Management**

Animal Orders **Approved Animals**

Animal Ordering
 Animal Transfer
 Cage Management
 Animal Details
 Animal Breeding
 Forms

Order Tally

Animal Ordering **Add a New Order**

0 result(s) found...

Edit/View	Status	Order Number	Requested Item	Requested Quantity	Received Amount	Recurring Order	Track Location	Retract Order	Delete Order	Copy Order
No orders have been added.										

As shown above, at this stage the study’s initial submission packet is approved by the board but no animal orders have yet been requested or processed. The study can now place an animal order request or animal transfer request.

In this example the study is placing an animal order request for animals from a vendor. See the Animal Transfer Processing section of this manual for information about animal transfer request processing.

Click the **Add a New Order** button. As shown below, the order form opens.

My Workspaces ▼ IACUC Number: **IACUC-2020-2365** Study Assistant **Animal Resource Center Order Form - (Version 1.0)** Back

Study Status: **Pending - Submitted for Initial Review** IACUC Number: IACUC-2020-2365 Study Title: Recessive Allele Inheritance in Mouse Coat Color

Save Form

Order Number: <Generated on Save>

Order Status: **Draft**

*** Order Date:** 04/07/2020 📅

*** Preferred Delivery Date:** 📅

*** Preferred Vendor:** --none-- ▼

Vendor Notes:

Requested Animals:

Requested Species: --none-- ▼

*** Requested Strain:** --none-- ▼

Total Approved Animals: 0

Total Available Animals: 0

*** Stock # / Order Code:**

*** Age/Size:**

*** Health Status:**

SPF Conventional

Immune Compromised Wild-caught

Germ-free

*** Unique Anatomical Features/Phenotype:**

Special Care:

Special Conditions:

*** Breeding:** Yes No

*** Number of Requested Males:**

*** Number of Requested Females:**

*** Number of Animals per Approved Pain Category:**

B	C	D*	E*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Proposed Location:

*** Number of Cages:**

* Cage Type:	* Facility:	* Building:	Floor:	* Room:	% Available Rooms Space:	% Available after receipt:	Number of Males:	Number of Females:	Total:
No Cages have been entered.									

*** Funding:**

Federal PO #:

Federal Document: (Upload File)

Drag your file here or click in this area.

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

*** Foundation: (Enter PD #)**

*** Requisition: (Enter Requisition #)**

Charge Account:

*** Order Charge Account:** --none-- ▼

*** Housing Charge Account:** --none-- ▼

The top section of the order form is shown in isolation below.

The **Order Number** and **Order Status** fields are read only.

Select the applicable **Order Date** and **Preferred Delivery Date** by clicking the applicable calendar widget to the right of each field, navigating to the desired date and clicking it to select. Note that these fields can be backdated.

Click in the **Preferred Vendor** field and click to select a vendor. *Note that available **Vendor** names are configured under [Animal Resource Center > Review Board Administration > System Setup tab > Setup Business Associate List link](#).*

Enter any desired **Vendor Notes**.

The **Requested Animals** section of the order form is shown below in isolation. *Note that because order forms are configurable by the institution, field and page content in this section of the form can vary by institution.*

	B	C	D*	E*
*Number of Animals per Approved Pain Category:	0	0	0	0

Click in the **Requested Species** field to open it and click to select a species from the list. *Note that this list is configured under [Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Setup Animal Species Configuration List link](#).*

Where applicable, click in the **Requested Strain** field to open it and click to select a strain from the list. The list is pre-filtered to include strains applicable to the requested species only. *Note that this list is configured under [Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Strain Configuration List link](#).*

The **Total Approved Animals** and **Total Available Animals** fields are read only. If this is the first animal order placed for the study the fields are set to zero because no animal orders have yet been processed for the study. If this is a

subsequent order, the fields display the total number of animals approved for ordering on the study and the remaining number of animals approved for ordering but not yet ordered, respectively.

Enter the **Stock # / Order Code**. This is a text entry field.

Enter the **Age/Size** of the requested animals in the provided format (e.g., 1 week / 100g). This is a text entry field.

Click to select the desired **Health Status** of the animals in the order.

Enter any applicable **Unique Anatomical Features/Phenotype** requirements for the animals in the order. This is a text entry field.

Enter any **Special Care** and **Special Conditions** details for the vendor and anyone else who might handle the animals in the provided text boxes.

Select "Yes" or "No" for **Breeding**.

Enter **Number of Requested Males** and **Number of Requested Females**. These are text entry fields that only accept a numeric value.

Enter the **Number of Animals per Approved Pain Category**. These are text entry fields that only accept a numeric value. Note that the total number of animals entered here must match the sum of numbers entered in the **Number of Requested Males** and **Number of Requested Females** fields. If the form is saved and the totals do not match, an error message will display and the form is not saved.

The **Proposed Location** section of the order form is shown in isolation below.

The screenshot shows the 'Proposed Location' section. It includes a text entry field for '* Number of Cages:' and a table for '* Cage Location(s):'. The table has columns for Cage Type, Facility, Building, Floor, Room, % Available Rooms Space, % Available after receipt, Number of Males, Number of Females, and Total. A message 'No Cages have been entered.' is displayed in the table area.

Enter the required **Number of Cages**. This is a text entry field that only accepts a numeric value.

The **Cage Locations** table populates with select list and text entry fields, as shown below. One row (red box in screenshot below) is provided in the table for each cage specified by the **Number of Cages** field. In the example below two cages are specified, so there are two rows.

The screenshot shows the 'Cage Location(s)' table. It has columns for Cage Type, Facility, Building, Floor, and Room. Each column has a dropdown menu with 'All' selected. The table contains two rows, each highlighted with a red border. The first row shows 'Mouse Cage' for all fields. A dropdown menu is open for the 'Cage Type' field, showing options: '--none--', 'Mouse -2', 'Mouse Cage', 'Mouse Cage -III', 'Mouse Cage II', and 'Mouse Cage New'. The 'Mouse Cage' option is highlighted in blue.

A dropdown select list (blue box in screenshot above) is provided for **Cage Type**, **Facility**, **Building**, **Floor** and **Room** fields, as shown above. Click in each field in turn to open it and click to select the desired item in each list.

Use the **All** button at the top of each column to open a popup form that allows for selection and assignment of the same select list value for ALL cages in the table.

Note that the lists for these fields are configured via Animal Resource Center > Review Board Administration > System Setup tab > Setup Cage Types, and [module] > Review Board Administration > System Setup tab > Setup Facilities/Buildings/Floors/Room, respectively.

The **Funding** section of the orders form is shown in isolation below.

*Funding:

Federal PO #:

Federal Document: (Upload File)
 Drag your file here or click in this area.

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

*Foundation: (Enter PO #)

*Requisition: (Enter Requisition #)

Charge Account:

*Order Charge Account: --none--

*Housing Charge Account: --none--

Enter the **Federal PO #**, if applicable. If adding a **Federal PO #**, it is also possible to upload any associated document file in the **Federal Document: (Upload File)** field by dragging the file from the desktop into the designated area shown in the screenshot above, or by clicking in the same area to open an upload popup box.

Enter the foundation purchase order (PO) number in the **Foundation (Enter PO #)** field.

Enter the requisition number in the **Requisition (Enter Requisition #)** field.

Click in the **Order Charge Account** field to open a drop down list of options; click the desired item in the list to select it. Select the account to which all order items not related to housing should be charged.

Click in the **Housing Charge Account** field to open a drop down list of options; click the desired item in the list to select it. Select the account to which all order items related to housing should be charged.

Note that charge account lists are impacted by certain system property settings under ARC > System Administration > System Configuration > Animal Resource Center section. Where the property system.arc_cost_center_required is set to "Yes", a cost center dedicated to ARC expenses is established and deployed in the system as a required field. Where the property system.use_arc_cost_center_user_access is set to "Yes" a cost center is automatically associated with each PI.

Also note that charge account lists are configured under ARC > Review Board Administration > List Maintenance Setup tab > Account List link.

Scroll back to the top of the page and click the **Save Form** button.

The order is now routed to the order processing area on the board side of the iRIS™ system.

Board Side

Navigate to ARC > **Orders**. The **Approved for Ordering** tab displays the queue of animal order requests submitted from the study side.

My Workspaces | ARC | **Orders** | Back

Find an Order Filters

Form Types: -- All -- | Principal Investigator: | Species: | Display Orders by Facility: -- All -- | Find ...

Approved for Ordering | **Pending Approval** | Pending Orders to Vendor | In Progress Orders | Received Orders | Quarantine | Completed | Print Friendly

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

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Total Requested	Date Board Received
	New Request	Recessive Allele Inheritance in Mouse Coat Color IACUC-2020-2365	ORD-20-801	Animal Resource Center Order Form	Redlands	Harper, Jill Dr., MD	Mouse - 129/56	50	04/07/2020 11:32 PM PDT

As shown in the screenshot above, the **Pending Approval** tab queue includes ten (10) columns of order detail:

Open — click the icon in this column to open the record for review and further processing

Order Status — current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**; *note that available **Order Statuses** are configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link*

IACUC Number / Study Title: Study Title — shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

Order Number — **Order Number** assigned to the order; *note that the **Order Number** is configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link*

Form Type — type of form used to request the animals

Facility — approved location for receipt of the animal order

Principal Investigator — originating PI on the order request

Requested Item — species and strain (if applicable) of animal(s) requested

Total Requested — total count of animals requested in the order

Date Board Received — date the order request was received by the board for further review and processing

Click the applicable icon in the **Open** column to open the corresponding order in the **Processing Animal Order Request** page for processing. As shown in the screenshot below, the page opens to the **Order Information** tab by default. Additional tabs populate here as the order progresses through further stages of processing.

My Workspaces | IACUC Number: **IACUC-2020-2365** | ARC | Processing Animal Order Request | Back

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021
IACUC Full Renewal Expiration Date: 04/05/2023

Order Information

Request Information: **Approval for Emily K Adell, Ph.D. with the role of Submitter:**

*Order Date: 04/03/2020
*Expected Delivery Date: 04/07/2020
Confirmation Number:
Regulation Number: RQ00021
*Method of Ordering: Web Email Paper Fax Phone
*Vendor: [902] Clinical Science Bldg - (CSBD) | Find Contact
Vendor Notes:
*Vendor Contact Name:
*Vendor Contact Phone Number:
Vendor Contact Fax Number:
*Vendor Contact Email:
Vendor Confirmation Documents:
No documents have been uploaded.

Order Animals:

Species: Mouse
Strain: 129/Sv
*Stock #/Order Code: 129SV-000023
*Age/Size: 1 week / 100 gram
*Number of Males Ordered: 25
*Number of Females Ordered: 25
*Number of Cages: 2

Cage Type	Facility	Building	Floor	Room	% Available Rooms (space)	% Available after receipt	Number of Males	Number of Females	Total
Mouse Cage	Reilands	Reilands Building 1	Reilands Building Floor 1	Reilands Building Floor Room 1	99.99647%	99.99644%	25	0	25
Mouse Cage	Reilands	Reilands Building 1	Reilands Building Floor 1	Reilands Building Floor Room 1	99.99647%	99.99641%	0	25	25
							25	25	50

Email Vendor: Send email order form to vendor through RQ

Order Log:

Date Modified	Modified By	Action
04/07/2020 11:32 PM PDF	Emily K Adell, Ph.D.	Order in Queue with status New Request

The read-only **Request Information** and **Approval for [PI name]** sections (red boxes in screenshot above) are collapsed by default. Click the respective plus sign to the left of the boldface section heading to expand it.

Details from the approved order request pre-populate in the **Order Animals** section (orange box in screenshot above). Notice that all fields in this section of the page are unlocked and can be edited. Make any desired changes in the **Order Animals** section of the page.

The upper section of the page is shown in isolation in the screenshot below. Notice that the **Vendor** field defaults to the study side's requested vendor, but a different vendor can be selected from the provided drop down list if desired.

Click the **Find Contact** button (red box in screenshot above) to look up and assign a vendor contact. As shown below, the **Find a Sponsor Contact: Select** popup dialog opens, containing a list of available contacts for the vendor.

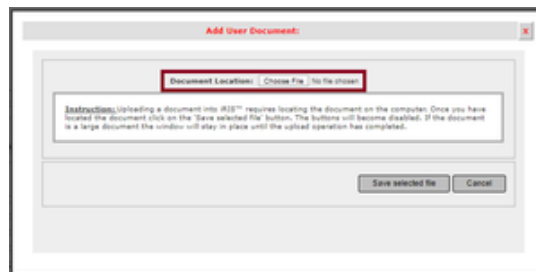
Select	Division	First Name	Last Name	Primary Phone	E-mail
	IV	Michael	Klugman		

Click the icon in the **Select** column at the far left to assign a contact.

Click the **Add a new Contact to the Master List** button to add a new contact. Clicking this button opens the **System Setup of Business Associate List** configuration page. See the ARC > Business Associate List manual for more information about setting up business associate records.

The popup closes automatically when the contact is either selected or created. Contact details are populated in the order form (red box in screenshot below).

To upload a vendor confirmation document, either drag the document into the **Vendor Confirmation Document** area (red arrow in screenshot above) or click in the area. As shown below, an upload dialog box opens.



Click the **Choose File** button (red box in screenshot above) and follow the usual prompts to navigate to the file on your computer and select it. When the applicable file name is displayed to the right of Document Location in the popup, click the **Save selected file** button to complete the upload.

When the **Order Information** tab is complete the reviewer has up to four options, as shown in the screenshot below.

Approved Location:	Cage Type:	Facility:	Building:	Floor:	Room:	% Available Rooms (space):	% Available after receipt:	Number of Males:	Number of Females:	Total:
Mouse Cage	All	Reelands	Reelands Building 1	Reelands Building Floor 1	Reelands Building Floor Room 1	99.99647%	99.99644%	25	0	25
Mouse Cage	All	Reelands	Reelands Building 1	Reelands Building Floor 1	Reelands Building Floor Room 1	99.99647%	99.99641%	0	25	25
								25	25	50

1. Save the order request as a draft with no further processing at this time — with the **Email Vendor** checkbox UNSELECTED (green arrow and box in screenshot above) click the **Save Order** button (blue box/arrow in screenshot above) to save all entered order details but keep the order in the **Approved for Ordering** tab; there is no change in order status and no notification is sent to the study side.

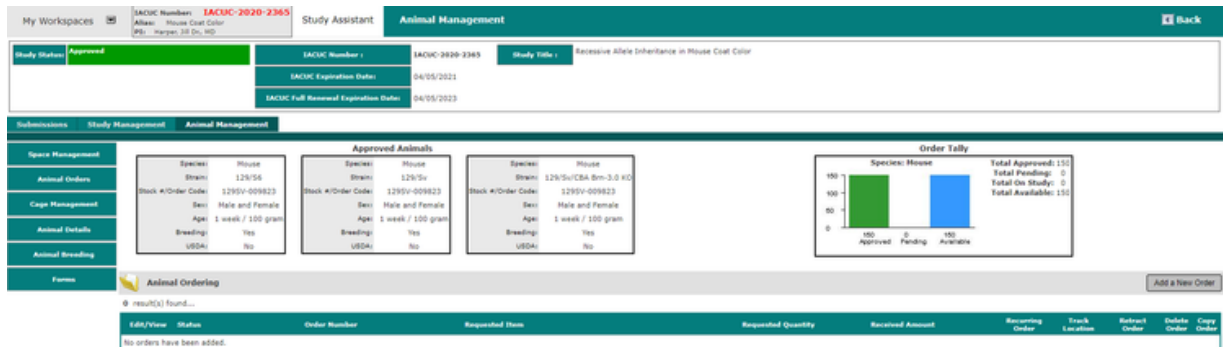
CAUTION: IF THE *Email Vendor* CHECKBOX IS SELECTED AND THE *Process Order* BUTTON IS MISTAKENLY CLICKED INSTEAD OF THE *Save Order* BUTTON, THE ORDER IS IMMEDIATELY SENT TO THE VENDOR.

1. Deny the order request — click the **Deny Order** button (red box/arrow in the screenshot above); on the board side the order moves to the **Completed** tab on the **Orders** page with a status of denied, and the applicable study side personnel are automatically notified of the status change
2. Approve the order request — with the **Email Vendor** checkbox UNSELECTED (orange arrow and box in previous screenshot) click the **Process Order** button; this process is typically used at institutions where multiple levels of

order review are required

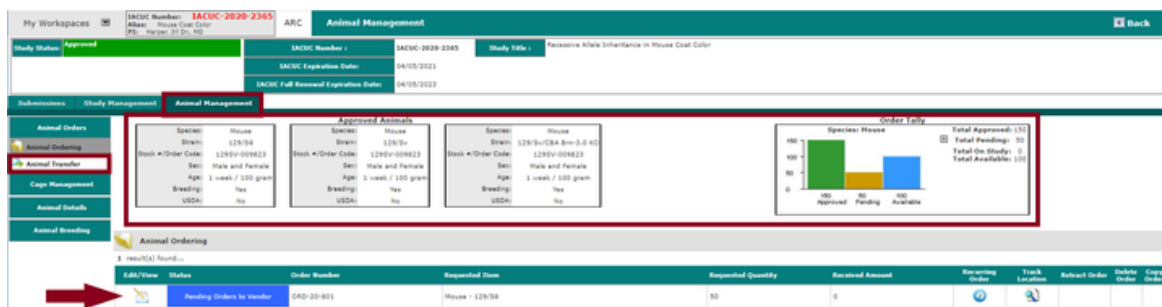
- Save the order and immediately send it to the vendor for processing — select the **Email Vendor** checkbox (orange box/arrow in previous screenshot), then click the **Process Order** button at the top right of the **Processing Animal Order Request** page; a **Receiving Information** tab populates to the right of the **Order Information** tab for entry of order receipt details when the order is received from the vendor; the order moves to the **Pending Orders to Vendor** tab on the **Orders** page on the board side

When either of the last two options is exercised, meaning that the board has approved the requested animal order, on the study side the **Animal Management** tab updates (see screenshot below) to show the total number of animals approved for ordering (green bar in **Order Tally** box to the right) and how many are approved for ordering but have not yet been ordered (blue bar in **Order Tally** box). Details of the approved animals appear in an **Approved Animals** box to the left of the **Order Tally** box.

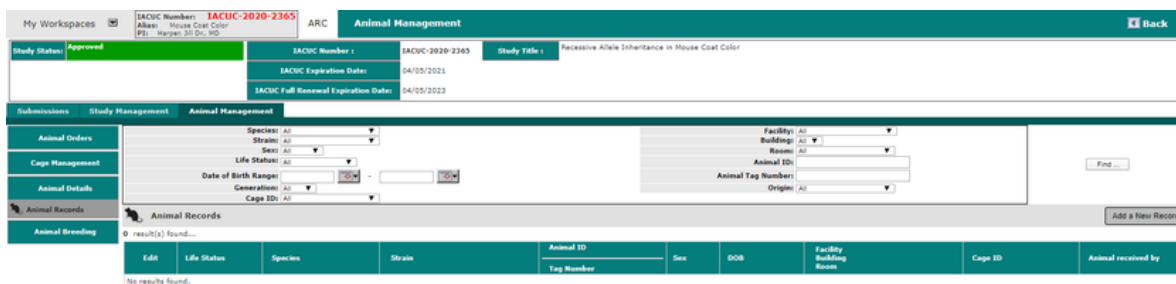


As demonstrated in the screenshot above, the pending column in the **Order Tally** box shows a value of “0” if the order is in a **Pending Approval** status on the **Orders** page on the board side, meaning that the order has not yet been sent to the vendor.

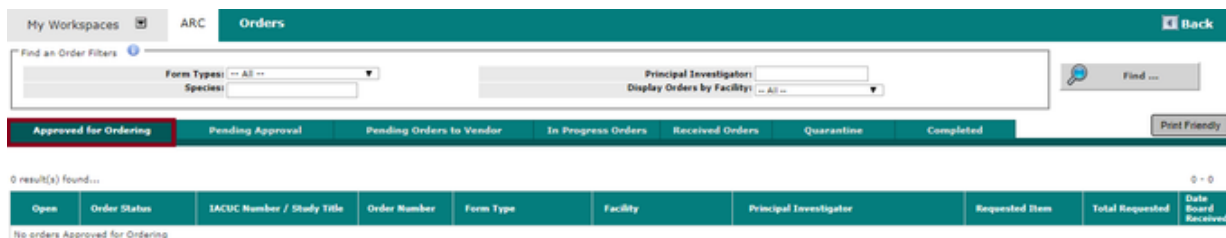
If the order was sent directly to the vendor (option 4 in the preceding numbered list), the order is listed in the **Animal Ordering** section of the **Animal Management** tab with a status of **Pending Orders to Vendor** (shown in screenshot below) and the **Pending** column reflects the number of animals specified in the order that was sent to the vendor.



On the study side, regardless of whether or not the order has been sent to the vendor, once the board has completed the **Approved for Ordering** processing step by granting its initial approval for the order an **Animal Records** tab is added beneath the **Animal Details** tab in the left hand sidebar, as shown in the screenshot below. The tab is empty at this stage of processing because no animals have yet been received.



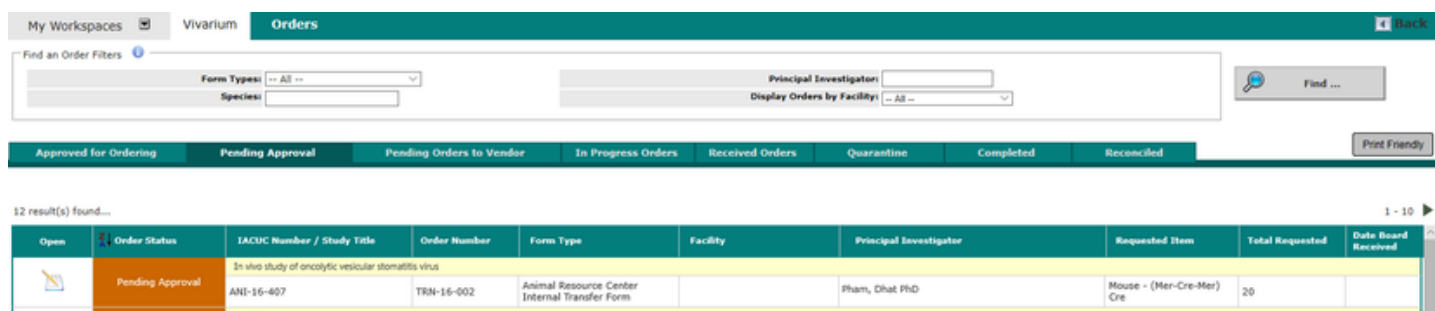
On the board side, the order request is cleared from the **Approved for Ordering** tab.



Orders Pending Approval

Navigate to Animal Resource Center > **Orders** and click to select the **Pending Approval** tab. This tab displays the queue of animal orders from the study side that are awaiting board review and order submission to a vendor.

*Note that a **Pending Orders to Vendor** tab, shown in the screenshot below, is only included on the **Orders** page when the `system.use_merge_vendor_orders` property is set to "Yes". In that configuration, the institution requires an additional round of review and approval before the order is sent to the vendor. When this tab is turned off (default behavior), orders are sent directly to vendors from the Pending Approval tab, and then move to the In Progress Orders tab. See the Pending Orders to Vendor section of this manual for more information.*



As shown in the screenshot above, the **Pending Approval** tab queue includes ten (10) columns of order detail:

Open — click the icon in this column to open the order for review and further processing

Order Status — current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**; *note that available **Order Statuses** are configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link*

IACUC Number / Study Title: Study Title — shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

Order Number — Order Number assigned to the order; note that the **Order Number** is configured under *Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link*

Form Type — type of form used to request the animals

Facility — approved location for receipt of the animal order

Principal Investigator — originating PI on the order request

Requested Item — species and strain (if applicable) of animal(s) requested

Total Requested — total count of animals requested in the order

Date Board Received — date the order request was received by the board for further review and processing

Click the icon in the **Open** column for the applicable study. The **Processing Animal Order Request** page opens, as shown below.

My Workspaces | IACUC Numbers: **IACUC-2020-2365** | ARC | **Processing Animal Order Request** | Back

Study Status: **Approval** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021
IACUC Full Renewal Expiration Date: 04/05/2023

Order Information | Save Order | Deny Order | Process Order

Vendor Contact Fax Number:
Vendor Contact Email:
Vendor Confirmation Document:
Delete Name | Date | View the Document
No documents have been uploaded.

Order Animals:

Species	Strain	*Stock #/Order Code	*Age/Size	*Number of Males Ordered	*Number of Females Ordered	*Number of Cages
Mouse	129/35	1299V-000823	1 week / 100 gram	25	25	2

Approved Location:

Cage Type	Facility	Building	Floor	Room	% Available Rooms	% Available after receipt	Number of Males	Number of Females	Total
Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	99.99647%	99.99644%	25	0	25
Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	99.99647%	99.99641%	0	25	25
							25	25	50

Email Vendor Send email order form to vendor through RIS

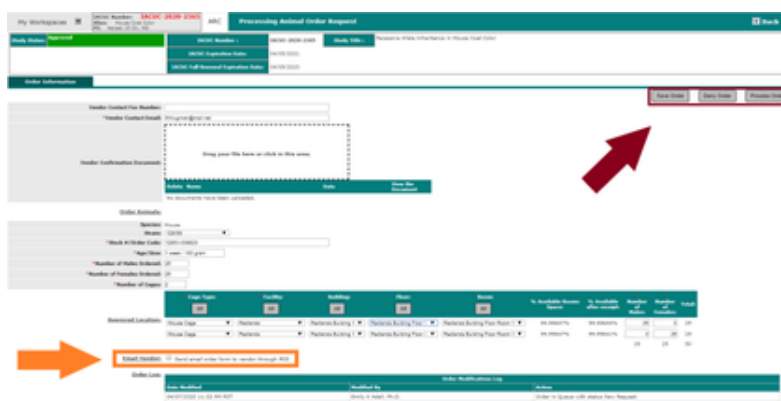
Order Log:

Date Modified	Modified By	Action
04/07/2020 11:32 PM PDT	Emily K Adell, Ph.D.	Order in Queue with status New Request

Data entry fields for the order are unlocked and editable, allowing for revisions prior to sending the order to the vendor.

To deny the order, click the **Deny Order** button (red box and arrow in screenshot above). On the board side the order moves to the **Completed** tab on the **Orders** page with a status of denied, and applicable study side personnel are automatically notified of the status change.

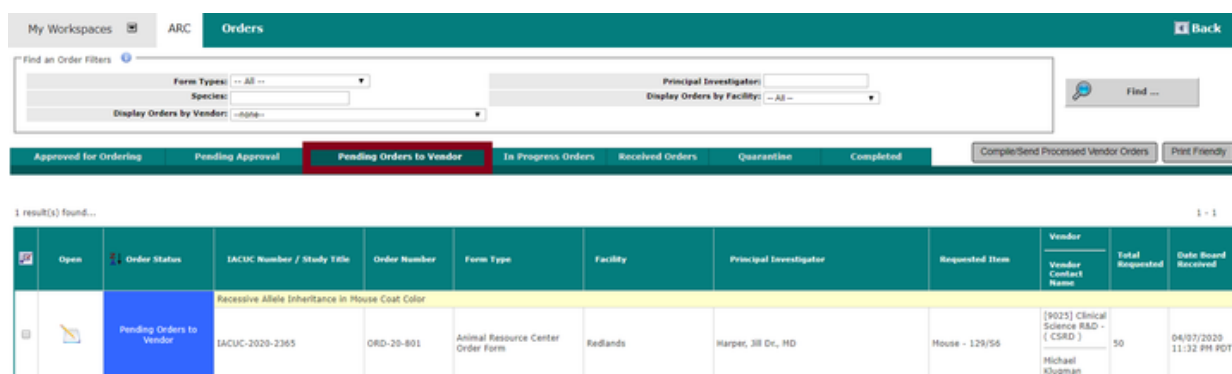
To proceed with processing the order, review order details and make any desired changes in the **Order Animals** and **Approved Location** sections of the page. The reviewer has up to four processing options, as shown in the screenshot below.



1. Save the order request as a draft with no further processing at this time — with the **Email Vendor** checkbox UNSELECTED (orange arrow and box in screenshot above) click the **Save Order** button (red box/arrow in screenshot above) to save all entered order details but keep the order in the Pending Approval tab; there is no change in order status and no notification is sent to the study side

CAUTION: IF THE *Email Vendor* CHECKBOX IS SELECTED AND THE *Process Order* BUTTON IS MISTAKENLY CLICKED INSTEAD OF THE *Save Order* BUTTON, THE ORDER IS IMMEDIATELY SENT TO THE VENDOR.

1. Deny the order — click the **Deny Order** button (red box/arrow in the screenshot above); on the board side the order moves to the **Completed** tab on the **Orders** page with a status of denied, and applicable study side personnel are automatically notified of the status change
2. Save the order and move it to the **Pending Orders to Vendor** tab on the **Orders** page (demonstrated in screenshot below) for final review and processing in a separate step — with the **Email Vendor** checkbox UNSELECTED (orange arrow and box in previous screenshot) click the **Process Order** button; this process is typically used at institutions where multiple levels of order review are required



Note that the order has not yet been sent to the vendor with this processing option. A final level of review and processing is managed from within the **Pending Orders to Vendor** tab, which allows for bulk order processing also. Visibility of the **Pending Orders to Vendor** tab is property controlled. See the *Animal Ordering Process Overview* section of this manual for more information.

1. Save the order and immediately send it to the vendor for processing — select the **Email Vendor** checkbox and click the **Process Order** button at the top right of the **Processing Animal Order Request** page; a **Receiving Information** tab populates to the right of the **Order Information** tab for entry of order receipt details when the order is received from the vendor; the order moves to the **Pending Orders to Vendor** tab on the **Orders** page on the board side

Unless the animal order is denied, the Animal Management tab is unchanged on the study side (see screenshot below) because while the order is still in process, no animals have yet been ordered.

The screenshot shows the 'Animal Management' section of a software interface. At the top, it displays 'My Workspaces' with 'IACUC Number: IACUC-2020-2365' and 'Study Assistant: Animal Management'. Below this, a 'Study Status' section shows 'Approved' and 'IACUC Number: IACUC-2020-2365'. A table lists 'Approved Animals' with columns for Species, Strain, Stock #/Order Code, Sex, Age, Breeding, and USDA. To the right, an 'Order Tally' chart shows 'Species: Mouse' with bars for 'Approved' (150), 'Pending' (0), and 'Available' (150). Summary statistics include 'Total Approved: 150', 'Total Pending: 0', 'Total On Study: 0', and 'Total Available: 150'. At the bottom, there is an 'Animal Ordering' section with a table header for 'Orders' and a note 'No orders have been added.'

Pending Orders to Vendor

Navigate to Animal Resource Center > **Orders** and click to select the **Pending Orders to Vendor** tab. This displays the queue of animal orders approved for processing that have not yet been sent to vendors. From here, orders can be sent to vendors in bulk following processing.

*Note that the **Pending Orders to Vendor** tab, shown in the screenshot below, is only included on the **Orders** page when the `system.use_merge_vendor_orders` property is set to "Yes". In that configuration, the institution requires an additional round of review and approval before the order is sent to the vendor. When this tab is turned off (default behavior), orders are sent directly to vendors from the **Pending Approval** tab, and then move to the **In Progress Orders** tab. See the **Pending Orders to Vendor** section of this manual for more information.*

The screenshot shows the 'Orders' page with the 'Pending Orders to Vendor' tab selected. The page includes a search filter section with 'Form Types' set to 'All', 'Species' set to 'Mouse', and 'Principal Investigator' set to 'Harper, Jill Dr., MD'. Below the filters, a table of order details is displayed. The table has 12 columns: Open, Order Status, IACUC Number / Study Title, Order Number, Form Type, Facility, Principal Investigator, Requested Item, Vendor, Vendor Contact Name, Total Requested, and Date Received. A single order is listed with the following details: Order Status: Pending Orders to Vendor, IACUC Number / Study Title: IACUC-2020-2365, Order Number: ORD-20-801, Form Type: Animal Resource Center Order Form, Facility: Redlands, Principal Investigator: Harper, Jill Dr., MD, Requested Item: Mouse - 129/56, Vendor: [9025] Clinical Science R&D - (CSRD), Vendor Contact Name: Michael Klugman, Total Requested: 50, Date Received: 04/07/2020 11:32 PM PDT.

As shown in the screenshot above, the **Pending Orders to Vendor** tab queue includes twelve (12) columns of order detail:

- **select** (far left, no text label): select checkboxes for compiling multiple orders (see Pending Orders to Vendor subsection of this manual)
- **Open**: click the icon in this column to open the order for review and further processing (see Pending Orders to Vendor subsection of this manual)
- **Order Status**: current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**

*Note that available **Order Statuses** are configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link.*

— **IACUC Number / Study Title:** **Study Title** is shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

— **Order Number:** **Order Number** assigned to the order

*Note that the **Order Number** is configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link*

— **Form Type:** type of form used to request the animals

— **Facility:** approved location for receipt of the animal order

— **Principal Investigator:** originating PI on the order request

— **Requested Item:** species and strain (if applicable) of animal(s) requested

— **Vendor / Vendor Contact Name:** company name of the vendor appears above the line in this column, name of the contact person at the vendor company appears below the line

— **Total Requested:** total count of animals requested in the order

— **Date Board Received:** date the order request was received by the board for further review and processing

Click the applicable icon in the **Open** column (red box in screenshot below) to review order details.

The screenshot shows the 'Orders' page in the ARC system. The page has a green header with 'My Workspaces', 'ARC', and 'Orders'. Below the header is a search and filter section with fields for 'Form Types', 'Species', 'Display Orders by Vendor', 'Principal Investigator', and 'Display Orders by Facility'. There is a 'Find ...' button. Below the search section is a navigation bar with tabs: 'Approved for Ordering', 'Pending Approval', 'Pending Orders to Vendor', 'In Progress Orders', 'Received Orders', 'Quarantine', and 'Completed'. There are also buttons for 'Complete/End Processed Vendor Orders' and 'Print Friendly'. Below the navigation bar is a table with 1 result(s) found. The table has columns: 'Open', 'Order Status', 'IACUC Number / Study Title', 'Order Number', 'Form Type', 'Facility', 'Principal Investigator', 'Requested Item', 'Vendor', 'Total Requested', and 'Date Board Received'. The first row is highlighted in yellow and has a red box around the 'Open' icon. The 'Order Status' is 'Pending Orders to Vendor'. The 'IACUC Number / Study Title' is 'Recessive Allele Inheritance in House Coat Color'. The 'Order Number' is 'ORD-20-801'. The 'Form Type' is 'Animal Resource Center Order Form'. The 'Facility' is 'Redlands'. The 'Principal Investigator' is 'Harper, Jill Dr., MD'. The 'Requested Item' is 'Mouse - 129/S6'. The 'Vendor' is '[9025] Clinical Science R&D - (CSRD)' and 'Michael Klugman'. The 'Total Requested' is '50'. The 'Date Board Received' is '04/07/2020 11:32 PM PDT'.

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Requested	Date Board Received
	Pending Orders to Vendor	Recessive Allele Inheritance in House Coat Color	ORD-20-801	Animal Resource Center Order Form	Redlands	Harper, Jill Dr., MD	Mouse - 129/S6	[9025] Clinical Science R&D - (CSRD) Michael Klugman	50	04/07/2020 11:32 PM PDT

The order is opened as read-only in the **Processing Animal Order Request** page, as shown below.

My Workspaces | IACUC Number: IACUC-2020-2365 | ARC | Processing Animal Order Request | Back

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Allele Inheritance in House Coat Color

IACUC Expiration Date: 04/05/2021
IACUC Full Renewal Expiration Date: 04/05/2023

Request Information:
Approval for Emily K Adel, Ph.D. with the role of Submitter:

*Order Date: 04/03/2020
*Expected Delivery Date: 04/07/2020
Confirmation Number: 5V987-25003
Requisition Number: RQ00821
*Method of Ordering: Web Email Paper Fax Phone
*Vendor: [9025] Clinical Science R&D - (CSRD)
Vendor Notes:
*Vendor Contact Name: Michael Klugman
*Vendor Contact Phone Number: 885551212
Vendor Contact Fax Number:
*Vendor Contact Email: MKlugman@mail.net
Vendor Confirmation Document: No documents have been uploaded.

Order Animals:
Species: House
Strain: 129/56
*Stock # / Order Code: 1295V-009823
*Age/Size: 1 week / 100 gram
*Number of Males Ordered: 25
*Number of Females Ordered: 25
*Number of Cages: 2

Cage Type	Facility	Building	Floor	Room	Number of Males	Number of Females	Total	Generate Card
House Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	25	0	25	Generate
House Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	0	25	25	Generate
					25	25	50	Print All

Approved Location:

Email Vendor: Send email order form to vendor through IRIS

Order Log:

Date Modified	Modified By	Action
04/08/2020 10:28 AM PDT	Emily K Adel, Ph.D.	Order status Changed to Pending Orders to Vendor
04/08/2020 10:28 AM PDT	Emily K Adel, Ph.D.	Multiple Fields Changed
04/07/2020 11:32 PM PDT	Emily K Adel, Ph.D.	Order in Queue with status New Request

Notice that cage cards can be generated via the **Generate** buttons in the **Approved Location** section of the page.

Click the **Back** link at the upper right to close the **Processing Animal Order Request** page

Back on the **Pending Orders to Vendor** tab of the **Orders** page, click to select the checkbox(es) of orders to be sent (far-left column), then click the **Compile/Send Processed Vendor Orders** button.

My Workspaces | ARC | **Orders** | Back

Find an Order Filters: Form Type: -- All -- | Species: | Principal Investigator: | Display Orders by Facility: -- All -- | Find ...

Display Orders by Vendor: -- All --

Approved for Ordering | Pending Approval | Pending Orders to Vendor | In Progress Orders | Received Orders | Quarantine | Completed | **Compile/Send Processed Vendor Orders** | Print Friendly

1 result(s) found...

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Requested	Date Received
<input checked="" type="checkbox"/>	Pending Orders to Vendor	IACUC-2020-2365	ORD-20-801	Animal Resource Center Order Form	Redlands	Harper, Jill Dr., MD	House - 129/56	[9025] Clinical Science R&D - (CSRD) Michael Klugman	50	04/07/2020 11:32 PM PDT

As shown below, the first selected order is opened in the **Create Vendor Order** popup. Here, a cover email can be composed for inclusion with the animal order(s).

Send email order form to vendor through IRIS'."/>

Click the **Generate and Download PDF** button (upper right corner of the popup) to save a PDF copy of the order. The PDF opens in a separate window, from which it can be saved/downloaded or printed in hard copy.

Make any desired changes to vendor details in the upper part of the popup, then click to select the **Email Vendor** checkbox at the bottom of the popup (red box in screenshot above).

As shown in the screenshot below, the popup expands to include a text editor for creation of the cover email to be sent to the vendor with the order(s).

 Send email order form to vendor through IRIS' checkbox is highlighted with a blue box. The 'Send Email To Vendor' button is highlighted with a red box. The email composition area includes a 'Subject' field with 'Animal Order', a 'Recipient(s)' field with 'Michael Klugman', and an 'Additional Recipient(s)' field. There is an 'Attachments' section with an 'Add Attachment' button and the text 'No Attachments have been added to this message'. A 'Template' dropdown menu is set to '-none-' with an 'Import template' button. The 'Content' field has a rich text editor toolbar and contains the text: 'Mr. Klugman: 150 animals are needed in total for this study, orders for the additional 100 will follow.'"/>

Enter the desired **Subject** for the email.

If templates have been created for vendor orders, they can be accessed via the **Template** field. Click in the field to open a dropdown list of available templates. Click to select the desired template, then click the **Import Template** button to apply it to the body of the email message.

Add any desired text to the body of the email message.

Click the **Send Email to Vendor** button. The button is replaced with text indicating “Delivery in progress”.

Create Vendor Order

*Vendor Contact Name: Michael Klugman
 *Vendor Contact Phone Number: 005551212
 *Vendor Contact Fax Number:
 *Vendor Contact Email: MKlugman@mail.net

Order Number	IACUC Number	Principal Investigator	Species	Strain/Stock #	Number of Males	Number of Females	Age/Size	Expected Delivery Date
ORD-20-801	IACUC-2020-2365	Ms. Jill Harper Dr., MD	Mouse	129/56	25	25	1 week / 100 gram	04/07/2020

Vendor Notes:

Email Vendor: Send email order form to vendor through IRIS

Email sent on: Delivery in Progress

*Subject: Animal Order
 Sent From: Emily K Adell
 Sent To: Michael Klugman
 IACUC Number: IACUC-2020-2365
 IACUC Expiration: 04/05/2021
 Alias: Mouse Coat Color
 Title: Recessive Allele Inheritance in Mouse Coat Color
 Project Status: Approved
 Principal Investigator: Harper, Jill Dr., MD
 Message Content: test

The order record is cleared from the **Pending Orders to Vendor** tab, as shown in the screenshot below.

My Workspaces | ARC | **Orders** | Back

Find an Order Filters: Form Types: -- All --, Species: , Principal Investigator: , Display Orders by Facility: -- All --, Find ...

Approved for Ordering | Pending Approval | **Pending Orders to Vendor** | In Progress Orders | Received Orders | Quarantine | Completed | Complete/Send Processed Vendor Orders | Print Friendly

0 result(s) found...

Open	Order Status	IACUC Number / Study Title	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor Vendor Contact Name	Total Requested	Date Received
No Pending Orders to Vendor										

The order record is moved to the **In Progress Orders** tab, as shown in the screenshot below. This is where sent orders remain until the shipment of animals is received.

My Workspaces | ARC | **Orders** | Back

Find an Order Filters: Form Types: -- All --, Species: , Principal Investigator: , Display Orders by Facility: -- All --, Find ...

Approved for Ordering | Pending Approval | Pending Orders to Vendor | **In Progress Orders** | Received Orders | Quarantine | Completed | Print Friendly

1 result(s) found...

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Ordered	Date Received
	Ordered - Pending Receipt	Recessive Allele Inheritance in Mouse Coat Color	RQ00821	ORD-20-801	Animal Resource Center Order Form	Redlands	Harper, Jill Dr., MD	House - 129/56	[9025] Clinical Science R&D - (CS&D)	50	04/07/2020 11:32 PM PDF

As shown below, a **Receiving Information** tab is added to the **Processing Animal Order Request** page. When the animal order arrives, this tab is where details of the shipment and condition of the animals are entered.

Processing Animal Order Request

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Albino Inheritance in House Coat Color

Order Information | **Requesting Information**

Request Information:
 Approval for Emily K Adell, Ph.D. with the role of Submitter

*Order Date: 04/10/2020
 *Expected Delivery Date: 04/11/2020
 Confirmation Number:
 Registration Number: R000221
 *Method of Ordering: Web Email Paper Fax Phone
 *Vendor: (360) Central Science R&D (CSRD)
 Vendor Notes:
 *Vendor Contact Name: Michael Klugman
 *Vendor Contact Phone Number: 3605512102
 Vendor Contact Fax Number:
 *Vendor Contact Email: mklugman@csrd.net
 Vendor Confirmation Document:
 Name: | Date: | View the Document:
 No documents have been uploaded.

Order Animals:
 Species: Mouse
 Strain: 129/Sv
 *Stock #/Order Code: 129SV-009823
 *Age/Size: 1 week / 100 gram
 *Number of Males Ordered: 25
 *Number of Females Ordered: 25
 *Number of Cages: 2

Cage Type	Facility	Building	Floor	Room	Number of Males	Number of Females	Total	Generate Card
Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 2	Redlands Building Floor Room 1	25	0	25	Generate
Approved Location:	Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 2	0	25	25	Generate

On the study side **Animal Management** tab, status is updated to **Pending Orders to Vendor** (red arrow in screenshot below). If the **Pending Orders to Vendor** tab is not in use at the institution, status updates to "In Progress".

Animal Management

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Albino Inheritance in House Coat Color

Submissions | Study Management | **Animal Management**

Animal Orders | Animal Ordering | **Animal Transfer** | Cage Management | Animal Details | Animal Breeding

Approved Animals:

Species	Strain	Stock #/Order Code	Sex	Age	Breeding	USDA
Mouse	129/Sv	129SV-009823	Male and Female	1 week / 100 gram	Yes	No

Order Tally:

Species: Mouse	Total Approved: 150
100 Approved	Total Pending: 50
0 Pending	Total On Study: 0
100 Available	Total Available: 100

Edit/View	Status	Order Number	Requested Date	Requested Quantity	Received Amount	Recurring Order	Track Location	Reorder Order	Delete Order	Copy Order
	Pending Orders to Vendor	ORD-20-801	House - 129/Sv	50	0					

Notice that the **Order Tally** graph (red box in screenshot above) updates to list the ordered animals as "Pending".

Recurring Orders

If the study has not yet ordered all of its approved animals, a recurring order can be added by clicking the icon in the **Recurring Order** column for the applicable order, as demonstrated in the screenshot below.

Recurring Order

Recurring Pattern Name:

Effective Date: 04/08/2020
 *Recurring Order Expiration Date:

Change Recurrence Pattern:
 Weekly Pattern: Return every week(s) on:
 Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Limit Number of Shipments to:

Save

Edit/View	Status	Order Number	Requested Date	Requested Quantity	Received Amount	Recurring Order	Track Location	Reorder Order	Delete Order	Copy Order
	Pending Orders to Vendor	ORD-20-801	House - 129/Sv	50	0					

Enter a **Recurring Pattern Name**. This identifier is used to distinguish the recurring order pattern (e.g., how frequently and on what day the order is to be sent to the vendor, and for how long) from any others in the system.

The **Effective Date** field is read-only and defaults to the current date.

Click on the calendar widget to open it and select a **Recurring Order Expiration Date**. No further recurring orders will be processed after that date.

Recurring orders default to weekly, on Mondays. Click in the **Change Recurrence Pattern** field to open a dropdown list with a second, “Monthly” option. Click to select the desired option. Where applicable, new fields populate for specific

In Progress Orders

Navigate to Animal Resource Center > Orders and click the **In Progress Orders** tab. This tab displays the queue of animal orders placed for which the animals have not yet been received. When livestock is received the order can be opened from this tab to process receipt of the order.

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Ordered	Date Board Received
	Ordered - Pending Receipt	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZSP4-mediated Cachexia in Pancreatic Cancer IACUC-2019-044	5	ORDER-2019-029	Animal Resource Center Order Form	California State University	Investigator: John Samson II, B.S.	House - CSTBUS	Animals R Us - (Animals R Us 1)	30	03/13/2019 06:52 AM PST

Note that a **Received Orders** tab and **Reconciled** tab are included on the **Orders** page (shown in screenshot above) when the system.use_received_reconciled_orders property is set to “Yes”. In that configuration, the order record moves from the **In Progress Orders** tab to the **Received Orders** tab. See the **Received Orders** section of this manual for more information.

As shown in the screenshot above, the **In Progress Orders** tab queue includes twelve (12) columns of order detail:

— **Open**: click the icon in this column to open the order for review and further processing (see **In Progress Orders** subsection of this manual)

— **Order Status**: current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**

Note that available **Order Statuses** are configured under **Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link**.

— **IACUC Number / Study Title**: **Study Title** is shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

— **Requisition Number**: Requisition Number assigned to the order

— **Order Number**: **Order Number** assigned to the order

Note that the **Order Number** is configured under **Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link**

— **Form Type**: type of form used to request the animals

— **Facility**: approved location for receipt of the animal order

- **Principal Investigator:** originating PI on the order request
- **Requested Item:** species and strain (if applicable) of animal(s) requested
- **Vendor:** company name of the vendor
- **Total Ordered:** total count of animals ordered
- **Date Board Received:** date the order request was received by the board for further review and processing

Use the search form at the top of the page to look up orders.

On the study side, at this stage of processing the order status is set to “Ordered – Pending Receipt”, as shown in the screenshot below.

The screenshot shows the 'Animal Management' interface for study IACUC-2020-2365. The 'Study Status' is 'Approved'. The 'Order Tally' chart shows 100 Approved, 50 Pending, and 100 Available animals. A table below shows one order with a status of 'Ordered - Pending Receipt' for 50 mice of strain 129/Sv.

Edit/View	Status	Order Number	Requested Item	Requested Quantity	Received Amount	Receiving Order	Track Location	Revised Order	Delete Order	Copy Order
	Ordered - Pending Receipt	ORD-20-801	Mouse - 129/Sv	50	0					

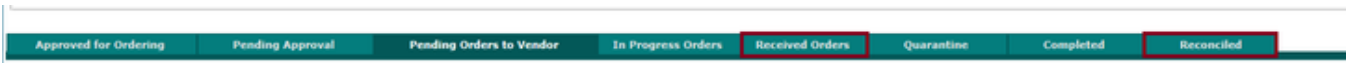
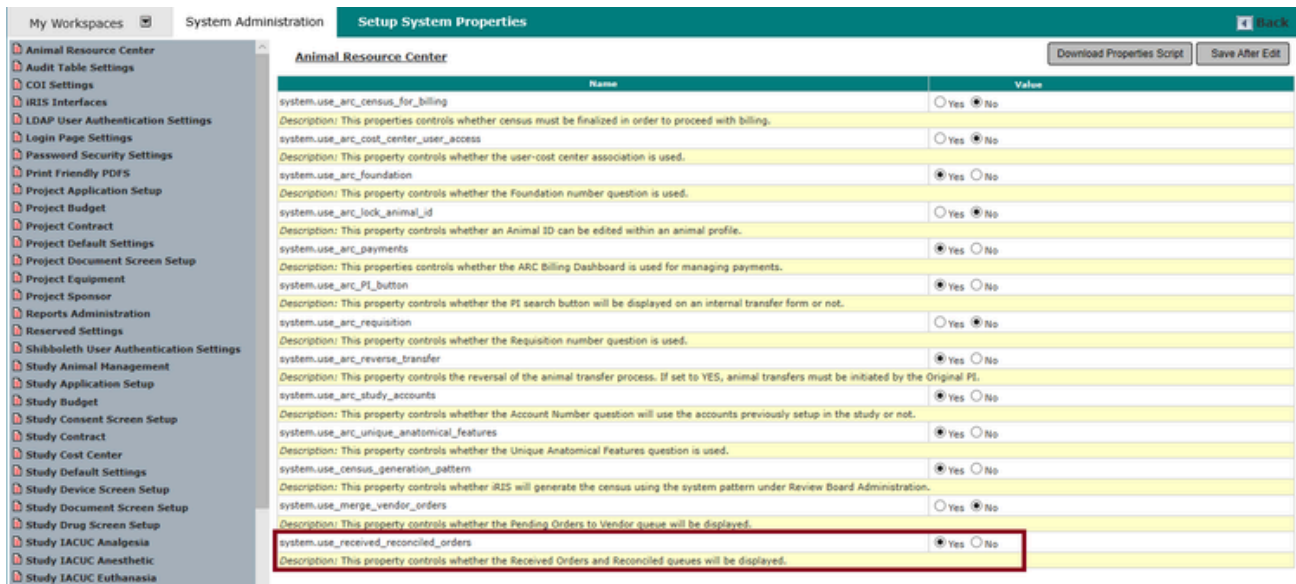
As shown below, at this stage of order processing no animals are released to the study.

The screenshot shows the 'Animal Records' section of the 'Animal Management' interface. The search criteria are set to 'All' for various fields. The results table is empty, showing '0 result(s) found...'.

Edit	Life Status	Species	Strain	Animal ID Tag Number	Sex	DOB	Facility Building Room	Cage ID	Animal received by
No results found.									

Received Orders

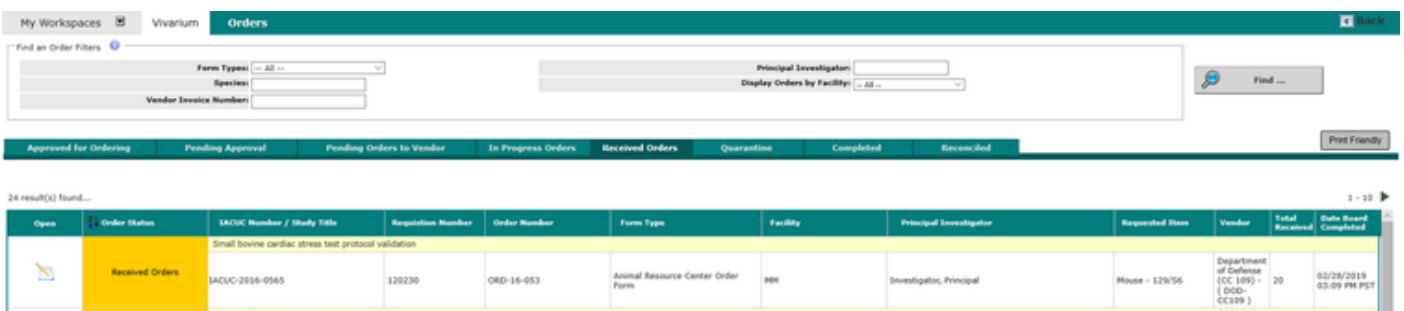
Received Orders and **Reconciled** tabs are included when the system.use_received_reconciled_orders property under iRIS™ System Administration > System Configuration > Animal Resource Center link (shown below) is set to “Yes”.



Turning the property on inserts an extra step of animal order tracking and review. This option is typically employed by institutions where one person has responsibility for receiving and inspecting the animal shipment and a different person is responsible for assigning the animals to their housing locations on the study.

Where the **Received Orders** and **Reconciled** tabs are not in use, received order records remain in the In Progress Orders tab until received and go directly to the **Completed** tab of the **Orders** page following processing, where they remain for historical reference purposes until archived.

When in use, the **Received Orders** tab displays the queue of received animal orders awaiting review and/or cage assignment. When the PI's review is complete and animals have been assigned to cages the order moves to either the **Quarantine** or **Completed** tab, depending on whether the animals are released to quarantine.



As shown in the screenshot above, the **Received Orders** tab queue includes twelve (12) columns of order detail:

— **Open**: click the icon in this column to open the order for review and further processing (see Received Orders subsection of this manual)

— **Order Status**: current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**

Note that available **Order Statuses** are configured under *Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link*.

— **IACUC Number / Study Title: Study Title** is shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

— **Requisition Number:** Requisition Number assigned to the order

— **Order Number:** Order Number assigned to the order

Note that the **Order Number** is configured under *Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link*

— **Form Type:** type of form used to request the animals

— **Facility:** approved location for receipt of the animal order

— **Principal Investigator:** originating PI on the order request

— **Requested Item:** species and strain (if applicable) of animal(s) requested

— **Vendor:** company name of the vendor

— **Total Received:** total count of animals received in the order

— **Date Board Completed:** date the order request was approved by the board

Use the search fields at the top of the page to look up the received order. Click the corresponding icon in the **Open** column to open it.

My Workspaces ARC Orders Back

Find an Order Filters

Form Types: -- All -- Species: Principal Investigator: Display Orders by Facility: -- All -- Find ...

Approved for Ordering Pending Approval Pending Orders to Vendor In Progress Orders Received Orders Quarantine Completed Print Friendly

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

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Ordered	Date Board Received	
	Ordered - Pending Receipt	Recessive Allele Inheritance in Mouse Coat Color	IACUC-2020-2365	RQ00821	ORD-20-002	Animal Resource Center Order Form	Radlands	Harper, Jill Dr., MD	Mouse - 129/Sv	[9025] Clinical Science R&D - (CSRD)	50	04/10/2020 02:20 PM PDT

The order is opened for receiving processing in the **Processing Animal Order Request** page, with the Order Information tab open by default. Click the **Receiving Information** tab (blue arrow in screenshot below).

My Workspaces | IACUC Number: **IACUC-2020-2365** | ARC | Processing Animal Order Request | [Back](#)

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021
IACUC Full Renewal Expiration Date: 04/05/2023

Order Information | Receiving Information

Request Information:
Approval for Emily K Adell, Ph.D. with the role of Submitter:

*Order Date: 04/03/2020
*Expected Delivery Date: 04/07/2020
Confirmation Number: SV987-25003
Requisition Number: RQ00021
*Method of Ordering: Web Email Pager Fax Phone
*Vendor: [9025] Clinical Science R&D - (CSRD)

As shown below, the tab opens for entry of receiving details. Notice the **Save Order** and **Mark Order as Received** (red box in screenshot below) buttons in the upper right corner of the tab.

My Workspaces | IACUC Number: **IACUC-2020-2365** | ARC | Processing Animal Order Request | [Back](#)

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021
IACUC Full Renewal Expiration Date: 04/05/2023

Order Information | **Receiving Information**

[Save Order](#) | [Mark Order as Received](#)

Request Information:
Approval for Emily K Adell, Ph.D. with the role of Submitter:

*Date Animals were Received:
*Container OK: Yes No
If No, Explain:

Physical Exam:

*General Appearance: Yes No
*Eyes, Ears, Nose, Mouth: Yes No
*Urogenital, Anus: Yes No
*Respiratory: Yes No
*Hydration: Yes No

Describe all abnormalities:
Report any signs of infectious disease to Animal Health Staff immediately.

Comments:

Order Animals:

Species: Mouse
Strain: 129/Sv
Stock #/Order Code: 1295V-009823
Age/Size: 1 week / 100 gram
Number of Males Ordered: 25
Number of Females Ordered: 25
*Number of Males Received:
*Number of Females Received:
*Quarantine Required? Yes No
*Number of Cages:

View Details	Cage Type	Facility	Building	Floor	Room	% Available Rooms (Space)	% Available after receipt	Number of Males	Number of Females	Total	Generate Card
Approved Location:	Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	99.99641%	99.99638%	25	0	25	Generate
	Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	99.99641%	99.99635%	0	25	25	Generate
								25	25	50	Print All

Order Log:

Date Modified	Modified By	Action
04/08/2020 12:17 PM PDT	Emily K Adell, Ph.D.	Order status Changed to Ordered - Pending Receipt
04/08/2020 12:17 PM PDT	Emily K Adell, Ph.D.	Single Field Changed Email Vendor
04/08/2020 10:28 AM PDT	Emily K Adell, Ph.D.	Order status Changed to Pending Orders to Vendor
04/08/2020 10:28 AM PDT	Emily K Adell, Ph.D.	Multiple Fields Changed
04/07/2020 11:32 PM PDT	Emily K Adell, Ph.D.	Order in Queue with status New Request

Click the **Save Order** button to save receiving information for the order in draft form while keeping the order in a Pending Orders to Vendor status.

The read-only **Request Information** and **Approval for [PI name]** sections at the top of the tab are collapsed by default. Click the respective plus sign to the left of the boldface section heading to expand it.

Enter details of study animals received as follows:

Date Animals Were Received — click in the calendar widget to open it, navigate to the date the animals were received and click to select it

Container OK — click to select “Yes” if the container was intact and in good condition, otherwise select “No”; use the **If No Explain** field to enter the reason for an answer of “No” here

Physical Exam section — Click to select “Yes” or “No” for each of the following inspected areas, where “Yes” indicates good condition and “No” indicates abnormality: **General Appearance; Eyes, Ears, Nose, Mouth; Urogenital, Anus; Respiratory; Hydration**; use the **Describe all abnormalities; Report any sign of infectious disease to Animal Health Staff Immediately** field to enter the reason for any answers of “No” here

Comments — enter any additional remarks about the shipment

Make any desired changes to the following fields in the **Order Animals** section

Number of Males Received — enter the total count of male animals received in this shipment

Number of Females Received — enter the total count of female animals received in this shipment

Quarantine Required? — click to select “Yes” if the animals are being released into quarantine, “No” if being released into general population facilities

Number of Cages — number of cages among which the animals will be divided for housing

Make any desired changes to the **Approved Location** section.

An example of the filled form is shown in the screenshot below. Click the **Mark Order as Received** button to save receiving details.

My Workspaces | IACUC Number: IACUC-2020-2365 | ARC | Processing Animal Order Request | Back

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021
IACUC Full Renewal Expiration Date: 04/05/2023

Order Information | **Receiving Information** | Save Order | Mark Order as Received

Request Information:
Approval for Emily K Adell, Ph.D. with the role of Submitter:

*Date Animals were Received: 04/14/2020

*Container OK: Yes No

If No, Explain:

Physical Exam:

*General Appearance: Yes No

*Eyes, Ears, Nose, Mouth: Yes No

*Urogenital, Anus: Yes No

*Respiratory: Yes No

*Hydration: Yes No

Describe all abnormalities; Report any sign of infectious disease to Animal Health Staff immediately.

Comments:

Order Animals:

Species: Mouse
Strain: 129/Sv
Stock # / Order Code: 129SV-009823
Age/Size: 1 week / 100 gram
Number of Males Ordered: 25
Number of Females Ordered: 25
*Number of Males Received:
*Number of Females Received:
*Quarantine Required? Yes No
*Number of Cages:

View Details:	Cage Type:	Facility:	Building:	Floor:	Rooms:	% Available Rooms Space:	% Available after receipt:	Number of Males:	Number of Females:	Total:	Generate Card:
<input checked="" type="checkbox"/>	Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	99.99629%	99.99627%	25	0	25	Generate
<input checked="" type="checkbox"/>	Mouse Cage	Redlands	Redlands Building 1	Redlands Building Floor 1	Redlands Building Floor Room 1	99.99629%	99.99624%	0	25	25	Generate
								25	25	50	Print All

Order Log:

Date Modified	Modified By	Action
04/15/2020 12:06 AM PDT	Emily K Adell, Ph.D.	Order status Changed to Ordered - Pending Receipt
04/15/2020 12:06 AM PDT	Emily K Adell, Ph.D.	Single Field Changed Email Vendor
04/14/2020 9:55 PM PDT	Emily K Adell, Ph.D.	Order status Changed to Pending Orders to Vendor
04/14/2020 9:55 PM PDT	Emily K Adell, Ph.D.	Multiple Fields Changed
04/10/2020 2:20 PM PDT	Emily K Adell, Ph.D.	Order in Queue with status New Request



Receiving Information is saved and a Received Orders tab populates (red arrow in screenshot below). Notice that the Save Order and Mark Order as Received buttons no longer appear on the Receiving Information tab (gray box and arrow in screenshot below).

My Workspaces | IACUC Number: IACUC-2020-2365 | ARC | Processing Animal Order Request | Back

Study Status: **Approved** | IACUC Number: IACUC-2020-2365 | Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021
IACUC Full Renewal Expiration Date: 04/05/2023

Order Information | **Receiving Information** | Received Orders

Request Information:
Approval for Emily K Adell, Ph.D. with the role of Submitter:

*Date Animals were Received: 04/14/2020

*Container OK: Yes No

If No, Explain:

Physical Exam:

*General Appearance: Yes No

*Eyes, Ears, Nose, Mouth: Yes No

*Urogenital, Anus: Yes No

*Respiratory: Yes No

*Hydration: Yes No

Describe all abnormalities; Report any sign of infectious disease to Animal Health Staff immediately.

Order Log:



As shown below, on the study side order status is updated to “Received Orders” (red box) on the **Animal Management** tab.

The screenshot shows the 'Animal Management' interface for a study titled 'Recessive Allele Inheritance in Mouse Coat Color'. The study status is 'Approved'. The IACUC Number is IACUC-2020-2365, with an expiration date of 04/05/2021. The IACUC Full Renewal Expiration Date is 04/05/2023.

Under 'Approved Animals', three animal profiles are shown, all for 'Species: Mouse', 'Strain: 129/Sv', 'Age: 1 week / 100 gram', 'Sex: Male and Female', 'Breeding: Yes', and 'USDA: No'. The Stock #/Order Code for all is 129SV-009823.

The 'Order Tally' chart shows:

- Approved: 150
- Pending: 50
- Available: 50

 Total Approved: 150, Total Pending: 50, Total On Study: 50, Total Available: 50.

The 'Orders' table below shows two rows:

Edit/View	Status	Order Number	Requested Item	Requested Quantity	Received Amount	Recurring Order	Track Location	Reorder	Delete Order	Copy Order
	Received Orders	ORD-20-802	Mouse - 129/Sv	50	50					
	Completed	ORD-20-801	Mouse - 129/Sv	50	50					

The **Order Tally** table (blue box in screenshot above) is unchanged because the animals have not yet been released to the study. In the example shown above the “50 Available” animals are from “Completed” **Order Number** “ORD-20-801”, for fifty (50) animals. The “50 Pending” animals are in **Order Number** ORD-20-802, which is still in a “Received Orders” status.

As demonstrated by the screenshots below, on the board side under Animal Resource Center > Orders, the order moves from the **In Progress** tab to the **Received Orders** tab.

The screenshot shows the 'Orders' interface with the 'In Progress Orders' tab selected. The search filters are: Form Types: -- All --, Species: (empty), Principal Investigator: (empty), Display Orders by Facility: -- All --. The search results show 0 results found.

The table below shows the current state:

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Ordered	Date Board Received
No orders in Process											

The screenshot shows the 'Orders' interface with the 'Received Orders' tab selected. The search filters are: Form Types: -- All --, Species: (empty), Vendor Invoice Number: (empty), Principal Investigator: (empty), Display Orders by Facility: -- All --. The search results show 1 result found.

The table below shows the current state:

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Received	Date Board Completed
	Received Orders	IACUC-2020-2365	RQ00821	ORD-20-802	Animal Resource Center Order Form	Redlands	Harper, Jill Dr, MD	House - 129/Sv	[9025] Clinical Science R&D - (CSRD)	50	04/20/2020 08:37 PM PDT

Click the icon in the **Open** column to open the order for further processing. As shown in the screenshot below, the order opens in the **Processing Animal Order Request** page. Notice that the page opens to the **Order Information** tab (red box) by default. Click the **Received Orders** tab (red arrow) to select it.

My Workspaces ⌵ IACUC Number: **IACUC-2020-2365** ARC Processing Animal Order Request ⌵ Back

Study Status: **Approved** IACUC Number: IACUC-2020-2365 Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021

IACUC Full Renewal Expiration Date: 04/05/2023

Order Information Receiving Information Received Orders

Request Information:
 Approval for Emily K Adell, Ph.D. with the role of Submitter:

*Order Date: 04/10/2020

*Expected Delivery Date: 04/11/2020

Confirmation Number:

Requisition Number: RQ00021

*Method of Ordering: Web Email Paper Fax Phone

*Vendor: [9025] Clinical Science R&D - (CSRD)

Vendor Notes:

As shown in the screenshot below, the **Received Orders** tab opens for entry of charge items from the order.

My Workspaces ⌵ IACUC Number: **IACUC-2020-2365** ARC Processing Animal Order Request ⌵ Back

Study Status: **Approved** IACUC Number: IACUC-2020-2365 Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021

IACUC Full Renewal Expiration Date: 04/05/2023

Order Information Receiving Information **Received Orders**

Save Order Mark Order as Completed

Request Information:
 Approval for Emily K Adell, Ph.D. with the role of Submitter:

Vendor Invoice Number:

+ Add Charge Item ✖ Delete Charge Item

Add Costs to Order					
	Charge Type	Charge Item	Item Price:	Quantity	Item Total
<input type="checkbox"/>	--none--	--none--			
<input type="checkbox"/>	--none--	--none--			
<input type="checkbox"/>	--none--	--none--			

Total Costs for this Order: \$ 0.00

Order Modifications Log		
Date Modified	Modified By	Action
04/09/2020 11:05 AM PDT	Emily K Adell, Ph.D.	Order status Changed to Received Orders
04/09/2020 11:05 AM PDT	Emily K Adell, Ph.D.	Multiple Fields Changed
04/08/2020 12:17 PM PDT	Emily K Adell, Ph.D.	Order status Changed to Ordered - Pending Receipt
04/08/2020 12:17 PM PDT	Emily K Adell, Ph.D.	Single Field Changed Email Vendor
04/08/2020 10:28 AM PDT	Emily K Adell, Ph.D.	Order status Changed to Pending Orders to Vendor
04/08/2020 10:28 AM PDT	Emily K Adell, Ph.D.	Multiple Fields Changed
04/07/2020 11:32 PM PDT	Emily K Adell, Ph.D.	Order in Queue with status New Request

Enter the **Vendor Invoice Number**.

At least one charge item must be entered in the **Add Costs to Order** section in order to release the animals from the order to the study side. By default, three (3) blank rows are provided for entry of invoice line items.

Beginning with the first empty row, enter details of each line item from the vendor invoice as follows. Only charges that are active are available for selection.

Charge Type — click in the field to open a dropdown list of available charge types and click one to select it

Charge Item — the selection made for **Charge Type** populates the dropdown list for this field with applicable items; click in the field to open the list and click an item in the list to select it

Item Price — the default price for the selected item automatically populates but can be edited; to change the default value, enter the cost per item for the line item in dollars and cents (e.g., if each item costs five dollars, enter 5.00)

Item Quantity — enter the quantity of the specified item received in the order

Item Total — this field automatically calculates, multiplying **Item Price** by **Item Quantity** to return a total cost for the line item

An example of the filled tab is shown below.

My Workspaces IACUC Number: **IACUC-2020-2365** ARC Processing Animal Order Request

Study Status: **Approved** IACUC Number: IACUC-2020-2365 Study Title: Recessive Allele Inheritance in Mouse Coat Color

IACUC Expiration Date: 04/05/2021

IACUC Full Renewal Expiration Date: 04/05/2023

Order Information Receiving Information Received Orders

Request Information:

Approval for Emily K Adell, Ph.D. with the role of Submitter:

Vendor Invoice Number: SA908-SV87640054

Add Costs to Order				
Charge Type	Charge Item	Item Prices	Quantity	Item Total
<input type="checkbox"/> Animals	Mice	\$9.00	50.00	\$450.00
<input type="checkbox"/> --none--	--none--	\$		\$
<input type="checkbox"/> --none--	--none--	\$		\$
Total Costs for this Order:				\$450.00

Order Modifications Log		
Date Modified	Modified By	Action
04/09/2020 11:05 AM PDT	Emily K Adell, Ph.D.	Order status Changed to Received Orders
04/09/2020 11:05 AM PDT	Emily K Adell, Ph.D.	Multiple Fields Changed
04/08/2020 12:17 PM PDT	Emily K Adell, Ph.D.	Order status Changed to Ordered - Pending Receipt
04/08/2020 12:17 PM PDT	Emily K Adell, Ph.D.	Single Field Changed Email Vendor
04/08/2020 10:28 AM PDT	Emily K Adell, Ph.D.	Order status Changed to Pending Orders to Vendor
04/08/2020 10:28 AM PDT	Emily K Adell, Ph.D.	Multiple Fields Changed
04/07/2020 11:32 PM PDT	Emily K Adell, Ph.D.	Order in Queue with status New Request

If the vendor invoice includes more than three (3) invoice line items click the **Add Charge Item** button (green arrow in screenshot above) to add a blank row.

If any line item is entered in error, click to select its checkbox in the far-left column and click the **Delete Charge Item** button to delete that line item.

When all line items from the vendor invoice are entered click the **Mark Order as Completed** button (red box at upper right corner in screenshot above).

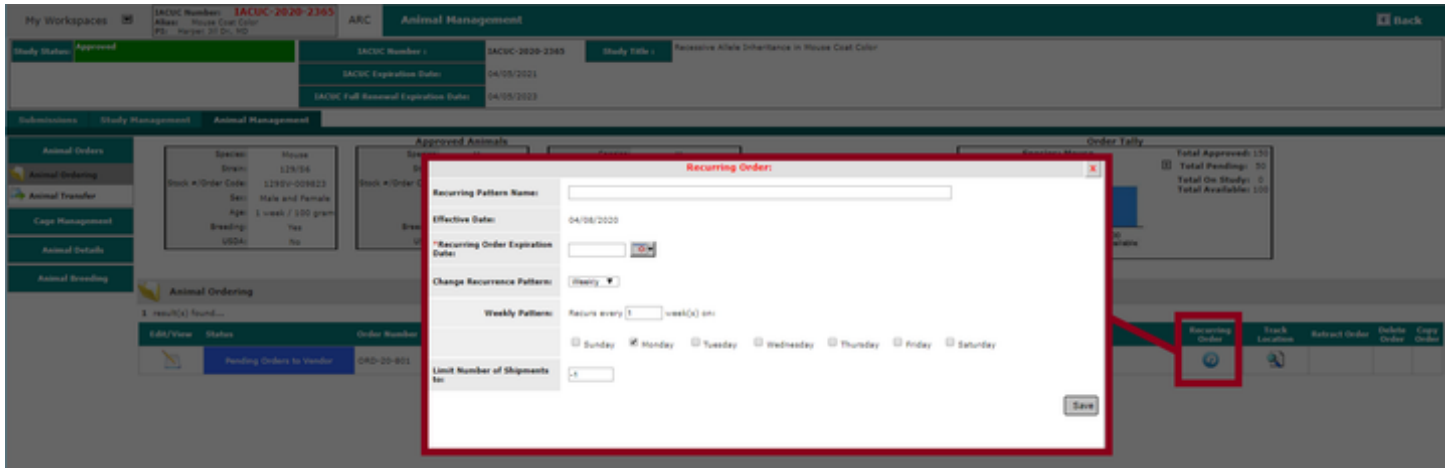
*CAUTION: clicking the **Mark Order as Completed** button releases the animals to the study, or to quarantine when specified for the order.*

As shown in the screenshot below, the **Mark Order as Completed** button is replaced by a **Mark as Reconciled** button. The **Vendor Invoice Number** field and **Add Costs to Order** section are locked against further editing (red box) and a line is added to the **Order Modification Log** section at the bottom of the tab (blue box) to track the order status change.

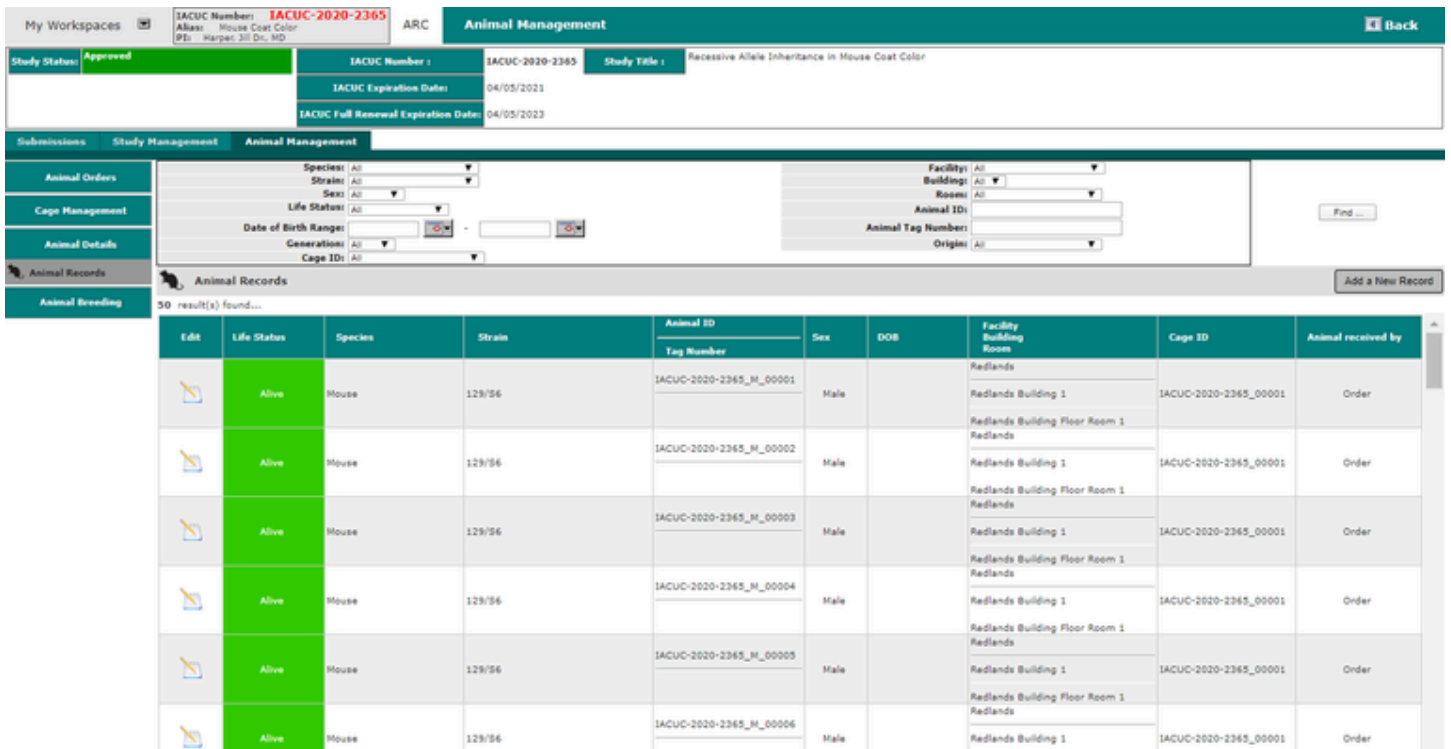
As shown below, on the study side order status is updated to “Completed” (red box) on the **Animal Management** tab.

The **Order Tally** area (blue box in screenshot above) updates. The 50 (fifty) animals that were previously in a “Pending” status have now been added to the “Available” column.

Click the icon in the **Recurring Order** column to create another order of the same type, as shown below. Note that no signoffs from the Study side are required for recurring orders, and orders enter the workflow immediately.



Records for animals released to the study are now populated on the study side. Click the **Animal Records** tab in the left-hand sidebar menu to access the individual animal records, as shown below.



See the Animal Resource Center > Livestock Management manual for more information about managing study animals.

Quarantined Orders

The **Quarantine** tab displays the queue of received quarantined animal orders awaitin review and/or cage assignment. When the review is complete and animals have been assigned to cages the order moves to the **Completed** tab.

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Received	Date Board Received
	In Quarantine	AND-16-407 Impacts of Circadian rhythm changes in Syrian Hamster ovulation	492610	TN-16-001	Animal Resource Center Internal Transfer Form	Greene Hall	Cooper, Holly DVM PhD	Syrian Hamsters LM-Smr-Ec2	KJM	20	05/09/2016 12:59 PM PST

As shown in the screenshot above, the **Quarantine** tab queue includes twelve (12) columns of order detail:

- **Open**: click the icon in this column to open the order for review and further processing (see Quarantined Orders subsection of this manual)

- **Order Status**: current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**

*Note: **Order Statuses** are configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link.*

- **IACUC Number / Study Title**: **Study Title** is shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

- **Requisition Number**: Requisition Number assigned to the order

- **Order Number**: **Order Number** assigned to the order

*Note: **Order Number** is configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link*

- **Form Type**: type of form used to request the animals

- **Facility**: approved location for receipt of the animal order

- **Principal Investigator**: originating PI on the order request

- **Requested Item**: species and strain (if applicable) of animal(s) requested

- **Vendor**: company name of the vendor

- **Total Received**: total count of animals received in the order

- **Date Board Received**: date the order request was received by the board for further review and processing

Click the icon in the **Open** column for the applicable order to enter quarantine details. The order is opened in the **Order Information** tab by default. Click the **Quarantine** tab (example shown below).

Account: Admin A admin, B.S. Brig. Gen.
 Department: WW - State's Test
 Path: Home > ARC order find

Calendar Help My Profile Log out

My Workspaces IACUC Number: IACUC-2019-1971 ARC Processing Animal Order Request Back

Study Status: Pending - Submitted for Initial Review Study Title: Test for species-5/20/2019

Order Information Receiving Information Received Orders Quarantine

Request Information:
 Approval for Anu N Mathur , B.S. with the role of Principal Investigator :

Receiving Animals:
 Species: cow
 Strain: Dairy Blue
 Stock # /Order Code: 55
 Age/Size: 5
 Number of Males Received: 20
 Number of Females Received: 20

Quarantine:
 Date Expected out of Quarantine: [calendar]
 Animals due out for testing?: Yes No
 Date Due out for Testing: [calendar]

Testing Results:
 Drag your file here or click in this area.

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

Actual Date of out Quarantine: [calendar]
 Move to Approved Location?: Yes No

Cage Type	Facility	Building	Floor	Room	% Available Rooms Space	% Available after receipt	Number of Males	Number of Females	Total	Generate Card
Cow Cage 3	ARC TEST FACILITY AM	Building A Test@123	First Floor	44332	99.325%	99.3025%	5	5	10	Generate
Cow Cage 1	ARC TEST FACILITY AM	Building A Test@123	First Floor	44332	99.325%	99.28%	5	5	10	Generate
Cow Cage 2	ARC TEST FACILITY AM	Building A Test@123	First Floor	44332	99.325%	99.2575%	5	5	10	Generate
Cow Cage 2	ARC TEST FACILITY AM	Building A Test@123	First Floor	44332	99.325%	99.235%	5	5	10	Generate
							20	20	40	Print All

Order Log:

Date Modified	Modified By	Action
02/10/2021 12:37 PM PST	Anu N Mathur , B.S.	Order status Changed to In Quarantine
02/10/2021 12:37 PM PST	Anu N Mathur , B.S.	Received Orders Charge Items Changed
02/10/2021 12:37 PM PST	Anu N Mathur , B.S.	Order status Changed to Received Orders
02/10/2021 12:37 PM PST	Anu N Mathur , B.S.	Single Field Changed Move to Approved Location?
02/10/2021 12:37 PM PST	Anu N Mathur , B.S.	Multiple Fields Changed
02/10/2021 12:31 PM PST	Anu N Mathur , B.S.	Order status Changed to Ordered - Pending Receipt
02/10/2021 12:31 PM PST	Anu N Mathur , B.S.	Single Field Changed Email Vendor
07/29/2019 9:07 AM PDT	Admin Admin admin, B.S. Brig. Gen.	Order status Changed to Pending Orders to Vendor

Note that all fields on the page are locked as read only, except for fields in the **Quarantine** section.

When the animals are received the following fields are completed:

Click to open the calendar widget for **Date Expected out of Quarantine**. Navigate to the desired date and click to select it.

Click the applicable radio button to select “Yes” or “No” for **Animals due out for testing?** If the answer is “Yes”, click to open the calendar widget for **Date due out for testing**. Navigate to the desired date and click to select it.

*Important note: verify that the default selection of “No” is in place for **Move to Approved Location?** before saving changes. When “Yes” is selected for this field and changes are saved, the animals are immediately released to the requesting study’s approved location and their corresponding records are added to the **Animal Details** tab of the **Animal Management** area of the requesting study.*

Click the **Save Record** button to save changes. Note that the animals remain in quarantine.

If the animals have gone out for testing and testing documentation is provided, that documentation can be uploaded and added to the file. Click in the dotted line box, or drag the desired file from the computer desktop or file manager window to the dotted line box, and follow the prompts to complete the upload.

Documents added in this manner are added to the table beneath the dotted line box. A **Delete** icon is provided for each document uploaded. If a document is uploaded in error, click the icon for the applicable document to delete it.

Click the **Save Record** button to save changes. Note that the animals remain in quarantine.

When quarantine is completed, the **Actual Date out of Quarantine** date is entered and the animals are released to the applicable study.

Click to open the calendar widget for **Actual Date out of Quarantine**. Navigate to the desired date and click to select it.

Click the radio button to select “Yes” for **Move to Approved Location?** Notice that this field defaults to “No”. When “Yes” is selected for this field and changes are saved, the animal records are immediately released to the study’s approved location.

Click the **Save Record** button to save changes. If “Yes” is selected for **Move to Approved Location?**, the animals are moved out of the quarantine facility and into the approved location. If “No” is selected, the animals remain in quarantine and the PI is notified

Regardless of whether or not the animals are physically moved out of quarantine facilities, the animal order record is moved to the **Completed** tab under ARC > Orders, and status for the Order is updated to “Complete” wherever that status appears.

Completed Orders

The **Completed** tab displays the queue of animal orders completed and released to studies.

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requested Item	Vendor	Total Received	Date Board Completed
	Completed	neurotoxicity of THC in mice IACUC-2018-1708	50	ORD-19-448	Animal Resource Center Order Form	200-HK12	Arroyo, Jorge MD	House - (Her-Cre-Her) Cre	Abbott Vascular Devices - (AVD)	2	10/24/2019 09:39 AM PST

As shown in the screenshot above, the **Completed** tab queue includes twelve (12) columns of order detail:

— **select** (far left, no text label): select checkboxes for marking orders as Reconciled (see Completed Orders subsection of this manual)

— **Open**: click the icon in this column to open the order for review and further processing (see Completed Orders subsection of this manual)

— **Order Status**: current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**

*Note that available **Order Statuses** are configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link.*

— **IACUC Number / Study Title**: **Study Title** is shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

— **Requisition Number**: Requisition Number assigned to the order

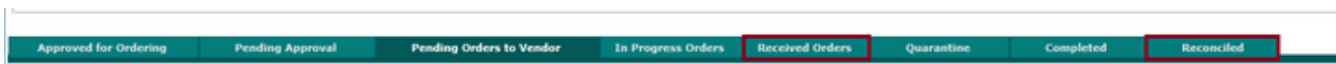
— **Order Number**: **Order Number** assigned to the order

*Note: **Order Number** is configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link*

My Workspaces System Administration Setup System Properties Back

Animal Resource Center Download Properties Script Save After Edit

Name	Value
system.use_arc_census_for_billing	<input type="radio"/> Yes <input checked="" type="radio"/> No
Description: This properties controls whether census must be finalized in order to proceed with billing.	
system.use_arc_cost_center_user_access	<input type="radio"/> Yes <input checked="" type="radio"/> No
Description: This property controls whether the user-cost center association is used.	
system.use_arc_foundation	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This property controls whether the Foundation number question is used.	
system.use_arc_lock_animal_id	<input type="radio"/> Yes <input checked="" type="radio"/> No
Description: This property controls whether an Animal ID can be edited within an animal profile.	
system.use_arc_payments	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This properties controls whether the ARC Billing Dashboard is used for managing payments.	
system.use_arc_pi_button	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This property controls whether the PI search button will be displayed on an internal transfer form or not.	
system.use_arc_requisition	<input type="radio"/> Yes <input checked="" type="radio"/> No
Description: This property controls whether the Requisition number question is used.	
system.use_arc_reverse_transfer	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This property controls the reversal of the animal transfer process. If set to YES, animal transfers must be initiated by the Original PI.	
system.use_arc_study_accounts	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This property controls whether the Account Number question will use the accounts previously setup in the study or not.	
system.use_arc_unique_anatomical_features	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This property controls whether the Unique Anatomical Features question is used.	
system.use_census_generation_pattern	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This property controls whether IRIS will generate the census using the system pattern under Review Board Administration.	
system.use_merge_vendor_orders	<input type="radio"/> Yes <input checked="" type="radio"/> No
Description: This property controls whether the Pending Orders to Vendor queue will be displayed.	
system.use_received_reconciled_orders	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description: This property controls whether the Received Orders and Reconciled queues will be displayed.	



The **Reconciled** tab displays the queue of received animal orders that have been reconciled against the Charge Master (see the ARC Orders and Billing Manual for Charge Master details).

My Workspaces Vivarium Orders Back

Find an Order Filters

Form Types: All -- Species: Vendor Invoice Number: Principal Investigator: Display Orders by Facility: All -- Find ...

Approved for Ordering Pending Approval In Progress Orders Received Orders Quarantine Completed Reconciled Print Friendly

12 result(s) found... 1 - 10

Open	Order Status	IACUC Number / Study Title	Requisition Number	Order Number	Form Type	Facility	Principal Investigator	Requisition Item	Vendor	Total Received	Date Board Completed
	Reconciled	IACUC-2019-044	5	ORDER-2019-026	Animal Resource Center Order Form	California State University	Nguyen, Xuan PhD	House - CS7BL/6	Animals R 1/6 - [Animals R 1/6]	10	03/11/2019 01:48 PM PST

As shown in the screenshot above, the **Reconciled** tab queue includes twelve (12) columns of order detail:

— **Open**: click the icon in this column to open the order for review and further processing (see Order Reconciliation subsection of this manual)

— **Order Status**: current status of the order; click the title header on this column to sort records in ascending or descending order by **Order Status**

*Note: **Order Statuses** are configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link.*

— **IACUC Number / Study Title**: **Study Title** is shown in a colored ribbon at the top of the record row; **IACUC Number** is shown in a field beneath the ribbon, directly to the right of the **Order Status** column

— **Requisition Number**: Requisition Number assigned to the order

— **Order Number**: **Order Number** assigned to the order

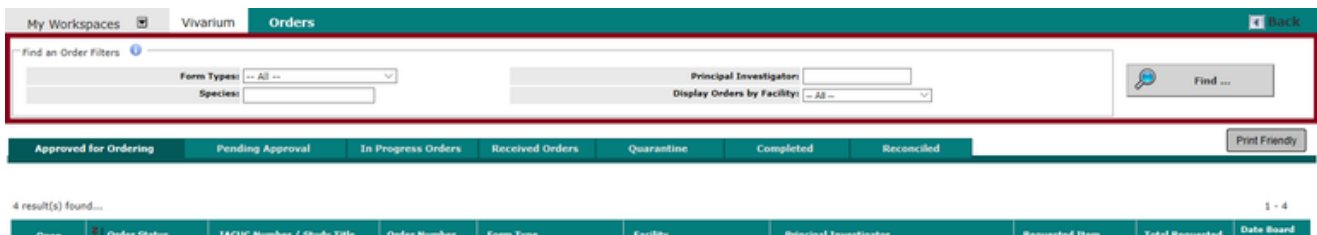
Note: **Order Number** is configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Numbering link

- **Form Type:** type of form used to request the animals
- **Facility:** approved location for receipt of the animal order
- **Principal Investigator:** originating PI on the order request
- **Requested Item:** species and strain (if applicable) of animal(s) requested
- **Vendor:** company name of the vendor
- **Total Received:** total count of animals received in the order
- **Date Board Completed:** date the order approval was completed by the board

Click the icon in the **Open** column to open a read-only version of the associated order.

Orders Page Find an Order Filters

As shown in the screenshot below, a **Find an Order Filters** search form is provided at the top of the **Orders** page and remains active for all available tabs. Enter desired search criteria and click the **Find...** button to limit orders shown in the results queue to those matching the specified search criteria.

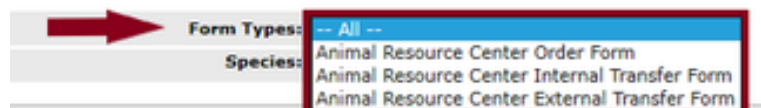


The screenshot shows the 'Orders' page with a search filter form at the top. The form includes fields for 'Form Types' (dropdown), 'Species' (text input), 'Principal Investigator' (text input), and 'Display Orders by Facility' (dropdown). A 'Find ...' button is located to the right of these fields. Below the search form is a navigation bar with tabs: 'Approved for Ordering', 'Pending Approval', 'In Progress Orders', 'Received Orders', 'Quarantine', 'Completed', and 'Reconciled'. A 'Print Friendly' button is also visible. Below the navigation bar, it indicates '4 result(s) found...' and shows the start of a table with columns: 'Open', 'Order Status', 'IACUC Number / Study Title', 'Order Number', 'Form Type', 'Facility', 'Principal Investigator', 'Requested Item', 'Total Requested', and 'Date Board'.

Available fields in the **Find an Order Filters** form vary, depending on the selected tab.

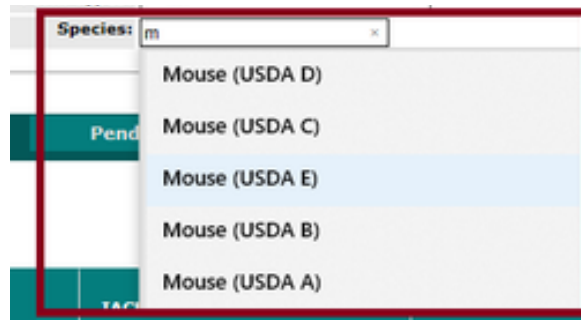
Search by Form Types

The **Form Types** field allows for searching by order/transfer form type and provides a dropdown picklists of options. Click the desired item to select it.



Search by Species

To search by species, enter the species name *exactly* as it appears in the applicable order request(s). As shown below a dynamic search list of recently entered species names populates as characters are typed into the field.

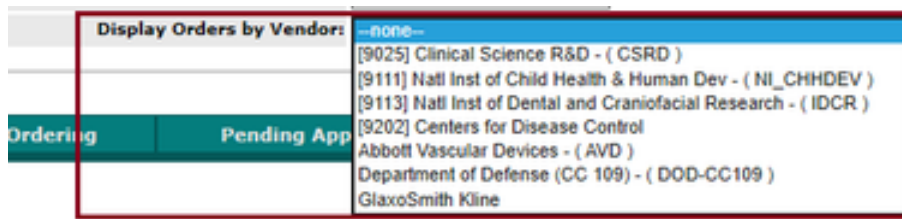


Click on an item in the dynamic search list to select it or type the full, desired **Species** name in the field.

*Note: text manually entered in the **Species** field must exactly match the full species name entered in the applicable order request(s), though the field is not case-sensitive.*

Search by Vendor Name

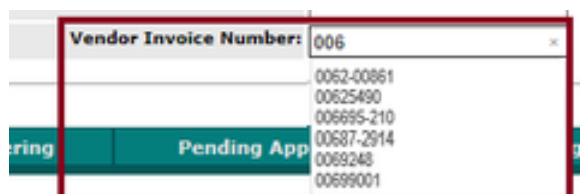
The **Display Orders by Vendor** field allows for searching by order/transfer form type and provides a dropdown picklists of options. Click the desired item to select it.



*Note: this search option does not appear for all tabs on the **Orders** page.*

Search by Vendor Invoice Number

To search by **Vendor Invoice Number**, enter the invoice number *exactly* as it appears in the applicable order request(s). As shown below a dynamic search list of recently entered invoice numbers populates as characters are typed into the field.



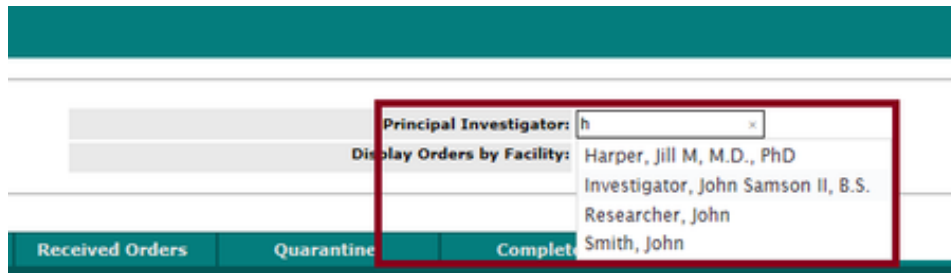
Click on an item in the dynamic search list to select it or type the full, desired **Vendor Invoice Number** in the field.

*Note: text manually entered in the **Vendor Invoice Number** field must exactly match the full invoice number entered in the applicable order request(s).*

*Note also that this search option does not appear for all tabs on the **Orders** page.*

Search by Principal Investigator

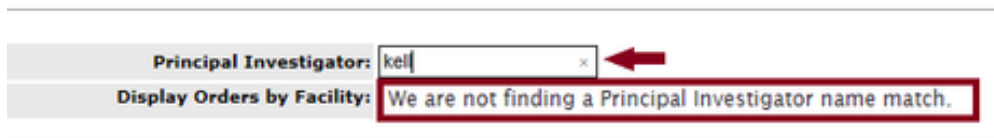
To search by Principal Investigator (PI) name, enter the PI name *exactly* as it appears in the **Principal Investigator** field in the applicable order/transfer request(s). As shown below a dynamic search list of recently entered PI names populates as characters are typed into the field.



The screenshot shows a search interface with a teal header bar. Below it, there are two input fields. The first field is labeled "Principal Investigator:" and contains the letter "h". A dropdown menu is open below this field, listing several names: "Harper, Jill M, M.D., PhD", "Investigator, John Samson II, B.S.", "Researcher, John", and "Smith, John". The second field is labeled "Display Orders by Facility:" and is currently empty. Below the input fields, there is a teal bar with three buttons: "Received Orders", "Quarantine", and "Completed".

Click on an item in the dynamic search list to select it or type the full, desired PI name in the field.

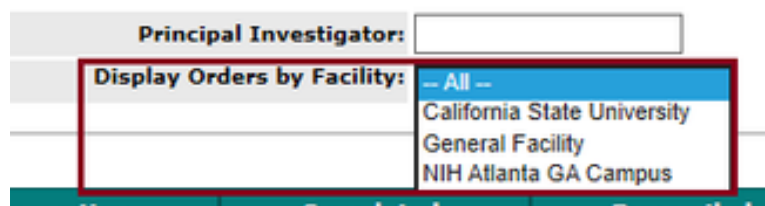
*Note: text manually entered in the **Principal Investigator** field must exactly match the full PI name entered in the applicable order request(s), though the field is not case-sensitive. As demonstrated in the screenshot below, an error message will display when no matches are located.*



The screenshot shows the same search interface as above. The "Principal Investigator:" field now contains the text "kell". A red arrow points to the end of the text in the field. The "Display Orders by Facility:" field now displays a red-bordered error message: "We are not finding a Principal Investigator name match."

Search by Facility Name

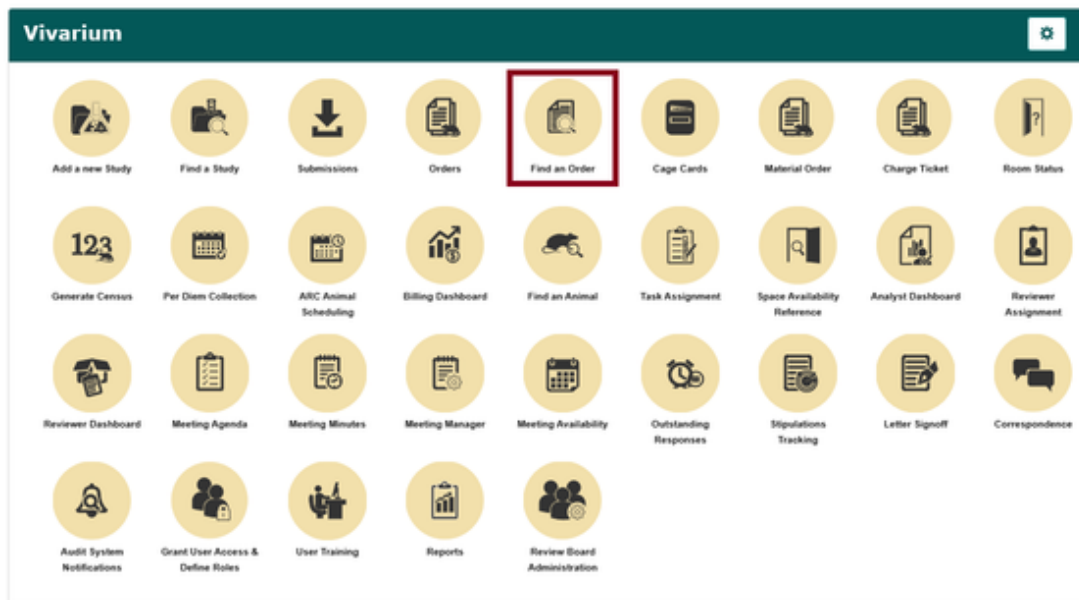
The **Display Orders by Facility** field allows for searching by facility name and provides a dropdown picklists of all Facility records configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Facilities/Buildings/Floors/Room link. Click the desired item to select it.



The screenshot shows the search interface with the "Principal Investigator:" field empty. The "Display Orders by Facility:" field has a dropdown menu open, showing a list of facility names: "-- All --", "California State University", "General Facility", and "NIH Atlanta GA Campus". The "Display Orders by Facility:" field is highlighted with a red border.

Find an Order Page

Navigate to ARC > ARC Workspace and click the **Find an Order** icon, shown below.



Note: the user has the option to rearrange icons on this page, the **Find an Order** icon may not appear in the same location on every user's ARC Workspace page.

As shown below, the **Find an Order** page opens.

My Workspaces Vivarium **Find an Order** 1

Find an Order Filters

Requisition Number:
 Order Number:
 IACUC Number:
 Active Principal Investigator
 Vendor:

Study Number:
 Order Status: All
 Date Order Placed: -
 Expected Delivery Placed: -

Find ...

19 result(s) found... 1 - 10

Open	Order Status	Requisition Number	Order Number	IACUC Number	Study Title	Principal Investigator	Vendor	Date Order Placed	Expected Delivery Date
	New Request	42854	ORDER-2019-043	IACUC-2019-044	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZFN-mediated Cachexia in Pancreatic Cancer	Investigator: John Samson II, B.S.			
	Completed	48051	ORDER-2019-019	IACUC-2019-044	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZFN-mediated Cachexia in Pancreatic Cancer	Investigator: John Samson II, B.S.	Animals R Us - (Animals R Us)	03/08/2019	03/07/2019
	Revised	48063	ORDER-2019-026	IACUC-2019-044	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZFN-mediated Cachexia in Pancreatic Cancer	Investigator: John Samson II, B.S.	Animals R Us - (Animals R Us)	03/11/2019	03/11/2019
	Ordered - Pending Receipt	25-0238	ORDER-2019-029	IACUC-2019-044	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZFN-mediated Cachexia in Pancreatic Cancer	Investigator: John Samson II, B.S.	Animals R Us - (Animals R Us)	03/09/2019	03/27/2019
	Revised	RN-002	ORDER-2019-030	IACUC-2019-058	#2 Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZFN-mediated Cachexia in Pancreatic Cancer	Investigator: John Samson II, B.S.	Animals R Us - (Animals R Us)	04/23/2019	04/30/2019
	Revised	28467	ORDER-2019-013	IACUC-2019-044	Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZFN-mediated Cachexia in Pancreatic Cancer	Investigator: John Samson II, B.S.	Animals R Us - (Animals R Us)	04/23/2019	04/30/2019

Orders in all statuses can be accessed from this page.

As shown below an **Open** column is provided to open orders for viewing or processing (see the Orders > [order status] Tab > [order status] subsections of this manual for order processing details), and a **Find an Order Filters** form is provided at the top of the page for entry of search criteria.

Note that it is not possible to search by both **Active** and **Inactive** PIs simultaneously.

As shown below, the **Vendor** dropdown provides a picklists to filter the search by vendor name. Click an item in the list to select it.

Note: available **Vendor** names are configured under *Animal Resource Center > Review Board Administration > System Setup tab > Setup Business Associate List link*.

As shown below, the **Order Status** dropdown provides a pick lists to filter the search by order status. Click an item in the list to select it.

Note: available **Order Statuses** are configured under *Animal Resource Center > Review Board Administration > System Setup tab > Setup Order Status link*.

As shown below, two options are provided for searching by date: **Date Order Placed** and **Expected Delivery Placed** (expected delivery date). Functionality is the same for both.

Click in the first field to open a dropdown list of months. Click the applicable month to select it.

Find an Order Filters ⓘ

Requisition Number:
 Order Number:
 IACUC Number:
 Active Principal Investigator:
 Vendor: --none--

Study Number:
 Order Status: All
 Date Order Placed:
 Expected Delivery Placed:

Find ...

To search for orders placed on a specific day, enter the desired day of the month in the second field and the four-digit year in the last field. To search for orders placed on *any* day in a certain month, leave the center (day) field blank and enter the desired four-digit year in the last field, as shown below.

Find an Order Filters ⓘ

Requisition Number:
 Order Number:
 IACUC Number:
 Active Principal Investigator:
 Vendor: --none--

Study Number:
 Order Status: All
 Date Order Placed: Mar 2019
 Expected Delivery Placed: --none--

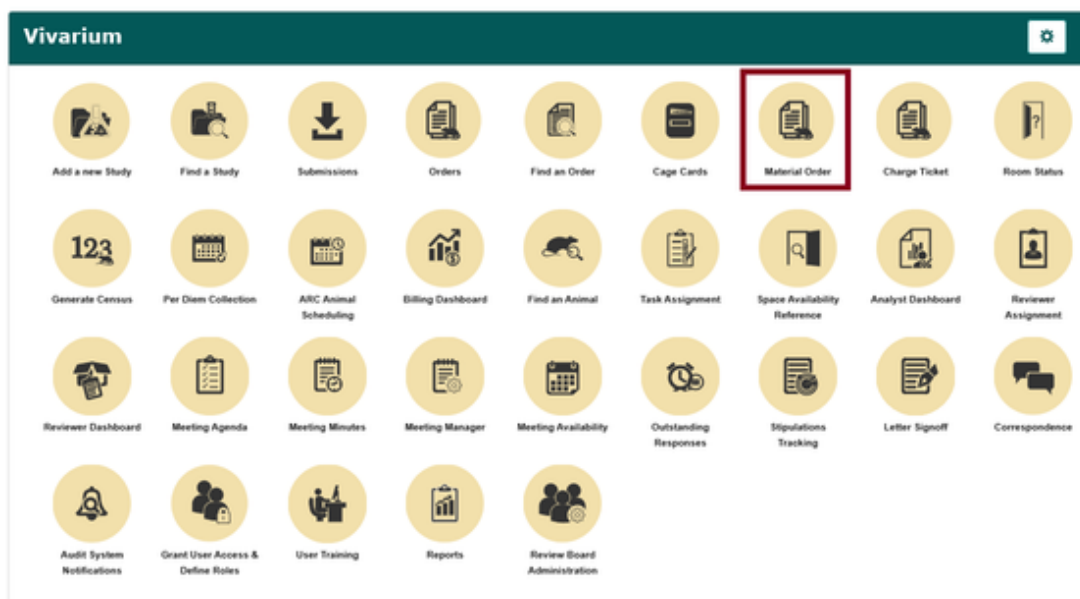
Find ...

After all desired criteria are entered click the **Find** button to load results in the lower part of the **Find an Order** page.

Clear all **Find an Order Filters** fields and click the **Find** button again to clear search criteria.

Material Order

Orders for materials, as opposed to animal orders, are entered, tracked and managed on the **Manage Material Order** page. To access the page, navigate to ARC > ARC Workspace and click the **Material Order** icon, shown below.



*Note that because the user has the option to rearrange icons on this page, the **Material Order** icon may not appear in the same location on every user's ARC Workspace page.*

As shown below, the **Manage Material Order** page opens.

My Workspaces ARC **Manage Material Order** [Back](#)

Material Order ID: Vendor:
 Material Order Status: All Ordered Between: -
 Submitted By:

[Reset Find Options](#)
[Find ...](#)

[Delete Material Order](#) [Create Material Order](#)

6 result(s) found...

<input type="checkbox"/>	Edit	Material Order ID	Status	Date Submitted	Vendor	Submitted By	Total Amount
<input type="checkbox"/>		74	In Process	06/10/2019	[9025] Clinical Science R&D	Jackson, Rachel	5,887.65
<input type="checkbox"/>		76	Complete	07/11/2019	Abbott Vascular Devices	Ann J Mather , Dr.	11.00
<input type="checkbox"/>		77	Preparing the order	07/23/2019	[9111] Natl Inst of Child Health & Human Dev	Jackson, Rachel	43.95
<input type="checkbox"/>		78	In Process	09/02/2020	[9111] Natl Inst of Child Health & Human Dev	Ann J Mather , Dr.	12.00
<input type="checkbox"/>		79	Order Pending	09/25/2020	[9025] Clinical Science R&D	Jackson, Rachel	85.25
<input type="checkbox"/>		80	In Process	09/25/2020	[9025] Clinical Science R&D	Ann J Mather , Dr.	2.35

Click the plus sign icon in the column to the immediate left of the **Status** column to view read-only line item details for the corresponding order, as demonstrated below.

My Workspaces ARC **Manage Material Order** [Back](#)

Material Order ID: Vendor:
 Material Order Status: All Ordered Between: -
 Submitted By:

[Reset Find Options](#)
[Find ...](#)

[Delete Material Order](#) [Create Material Order](#)

6 result(s) found...

<input type="checkbox"/>	Edit	Material Order ID	Status	Date Submitted	Vendor	Submitted By	Total Amount																
<input type="checkbox"/>		74	In Process	06/10/2019	[9025] Clinical Science R&D	Jackson, Rachel	5,887.65																
				<table border="1"> <thead> <tr> <th>Item Name</th> <th>Cost</th> <th>Quantity</th> <th>Total Item Cost</th> </tr> </thead> <tbody> <tr> <td>Strawberry</td> <td>5,651.75</td> <td>1.00</td> <td>5,651.75</td> </tr> <tr> <td>Colorful Bell Pepper(Mini)</td> <td>3.78</td> <td>1.00</td> <td>3.78</td> </tr> <tr> <td>Grapes</td> <td>10.00</td> <td>1.00</td> <td>10.00</td> </tr> </tbody> </table>				Item Name	Cost	Quantity	Total Item Cost	Strawberry	5,651.75	1.00	5,651.75	Colorful Bell Pepper(Mini)	3.78	1.00	3.78	Grapes	10.00	1.00	10.00
Item Name	Cost	Quantity	Total Item Cost																				
Strawberry	5,651.75	1.00	5,651.75																				
Colorful Bell Pepper(Mini)	3.78	1.00	3.78																				
Grapes	10.00	1.00	10.00																				

Add Material Order

Navigate to ARC > ARC Workspace and click the **Material Order** icon, shown below.

Vivarium [Settings](#)

Add a new Study
 Find a Study
 Submissions
 Orders
 Find an Order
 Cage Cards
 Material Order
 Charge Ticket
 Room Status

123

As shown below, the **Manage Material Order** page opens.

Administration > System Setup tab. See the ARC Business Associate List manual for more information about vendor configuration list setup and maintenance.

The **Vendor Information** field automatically populates with read-only information based on selections in the **Vendor** field.

At the upper right, a **Reason** field is provided for entry of order justification notes.

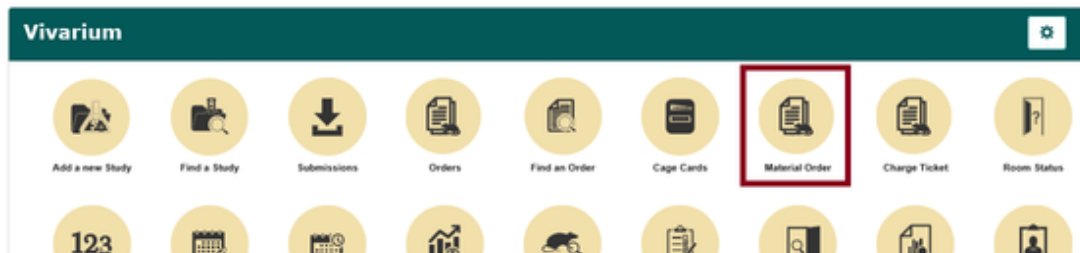
Four blank line items are provided for material items to be included in the order. For each item, enter a name in the **Item** column, a dollar amount in the **Cost** column and a number in the **Quantity** column. The **Total Cost** column and **Grand Total** fields auto-calculate.

To add more line items, click the **Add Item** button once for each line to be added.

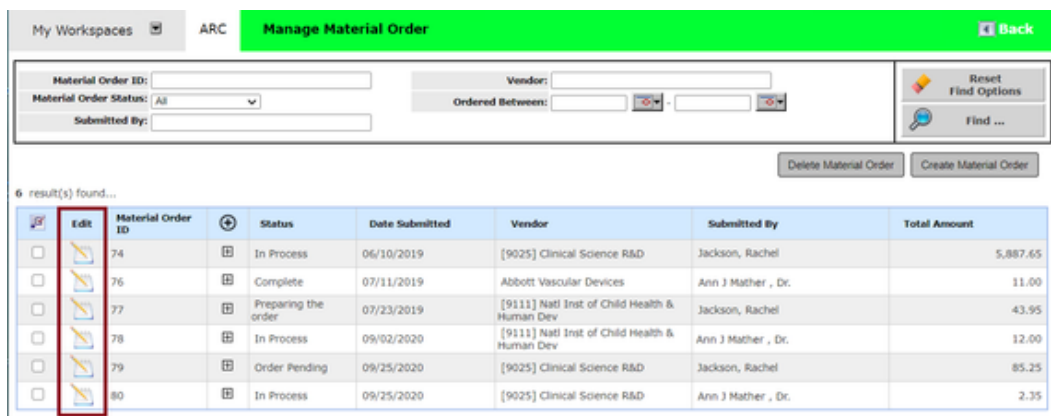
When all line items are added click the **Save** button to close the popup and add the **Material Order** to the **Manage Material Order** page.

Edit Material Order

Navigate to ARC > ARC Workspace and click the **Material Order** icon, shown below.



As shown below, the **Manage Material Order** page opens.









My Workspaces ARC **Manage Material Order** Back

Material Order ID: Vendor:
Material Order Status: All Ordered Between: -
Submitted By: Reset Find Options Find ...

Delete Material Order Create Material Order

6 result(s) found...

	Edit	Material Order ID	Status	Date Submitted	Vendor	Submitted By	Total Amount
<input type="checkbox"/>		74	In Process	06/10/2019	[9025] Clinical Science R&D	Jackson, Rachel	5,887.65
<input type="checkbox"/>		76	Complete	07/11/2019	Abbott Vascular Devices	Ann J Mather , Dr.	11.00
<input type="checkbox"/>		77	Preparing the order	07/23/2019	[9111] Natl Inst of Child Health & Human Dev	Jackson, Rachel	43.95
<input type="checkbox"/>		78	In Process	09/02/2020	[9111] Natl Inst of Child Health & Human Dev	Ann J Mather , Dr.	12.00
<input type="checkbox"/>		79	Order Pending	09/25/2020	[9025] Clinical Science R&D	Jackson, Rachel	85.25
<input type="checkbox"/>		80	In Process	09/25/2020	[9025] Clinical Science R&D	Ann J Mather , Dr.	2.35

Click the icon in the **Edit** column for the applicable material order, as shown above. As shown below, the order is opened in a **Material Order** popup for editing.

Material Order:

*Material Order ID: 74

*Date Ordered: 06/10/2019

*Payment Options: Credit

*Requested by: Muthu Anu N. B.S

*Order Method: Email

*Order Status: In Process

Next Action: Next Action 2

*Vendor: [JSC] Clinical Science R&D - (CSRD) Find Contact

*Vendor Information: John Kerry john.kerry@yahoo.com
DC: District of Columbia

Add Item Save

Item	Cost	Quantity	Total Cost
Strawberry	5.65175	100	565.175
Colorful Bell Pepper(Min)	3.75	100	375.00
Grapes	10.00	100	1,000.00
Tuesday Testing-ABC Material Ord	0.00	100	0.00
44104 Calibrated Water Bottle fo	66.00	100	6,600.00
Tuesday Testing-ABC Material Ord	0.00	100	0.00
Watermelon	1.20	100	120.00
Colorful Bell Pepper(Min)	3.75	100	375.00
Colorful Bell Pepper(Min)	3.75	100	375.00
44104 Calibrated Water Bottle fo	66.00	100	6,600.00
Grapes	10.00	100	1,000.00
Peanut Butter and Jelly	3.61	100	361.00
Strawberry	1.75	100	175.00
44104 Calibrated Water Bottle fo	66.00	100	6,600.00
Grand Total :			500,765.00

Make desired changes to the order details at the top of the popup and individual order line items at the bottom.

To add a line item to the bottom section, click the **Add Item** button as shown below.

Material Order:

*Material Order ID: 74

*Date Ordered: 06/10/2019

*Payment Options: Credit

*Requested by: Ann J Mather, Dr.

*Order Method: Email

*Order Status: In Process

Next Action: Next Action 2

*Vendor: [JSC] Clinical Science R&D - (CSRD) Find Contact

*Vendor Information: John Kerry john.kerry@yahoo.com
DC: District of Columbia

Add Item Save

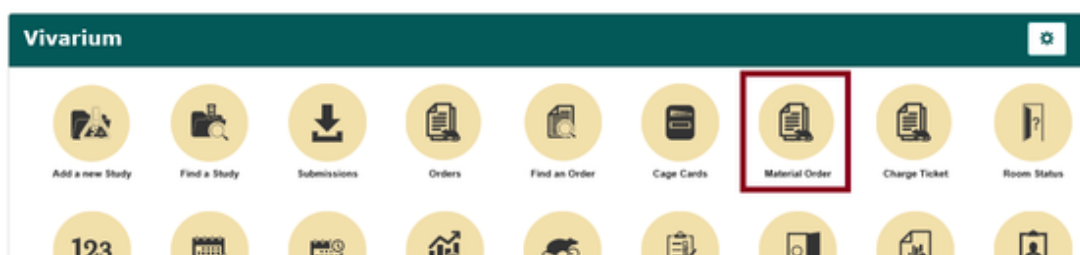
Item	Cost	Quantity	Total Cost
Strawberry	5.65175	100	565.175
Colorful Bell Pepper(Min)	3.75	100	375.00
Grapes	10.00	100	1,000.00
Tuesday Testing-ABC Material Ord	0.00	100	0.00
44104 Calibrated Water Bottle fo	66.00	100	6,600.00
Tuesday Testing-ABC Material Ord	0.00	100	0.00
Watermelon	1.20	100	120.00
Colorful Bell Pepper(Min)	3.75	100	375.00
Colorful Bell Pepper(Min)	3.75	100	375.00
44104 Calibrated Water Bottle fo	66.00	100	6,600.00
Grapes	10.00	100	1,000.00
Peanut Butter and Jelly	3.61	100	361.00
Strawberry	1.75	100	175.00
44104 Calibrated Water Bottle fo	66.00	100	6,600.00
Grand Total :			500,765.00

Note: the **Total Cost** and **Grand Total** fields dynamically update as changes are entered or items are added in the line item detail section.

When changes are complete click the **Save** button to close the popup and return to the **Manage Material Order** page.

Delete Material Order

Navigate to ARC > ARC Workspace and click the **Material Order** icon, shown below.

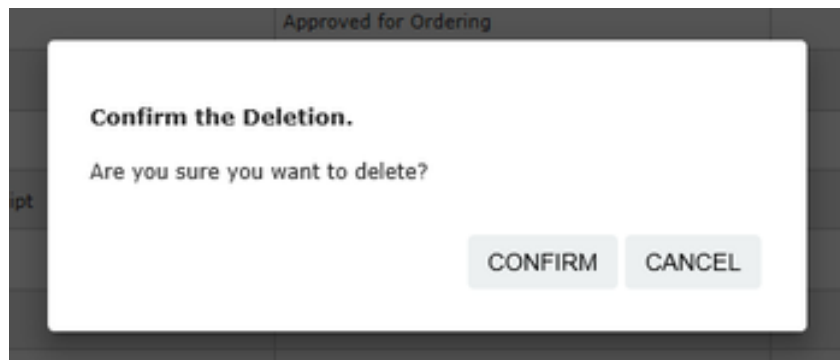


As shown below, the **Manage Material Order** page opens.

	Material Order ID	Status	Date Submitted	Vendor	Submitted By	Total Amount
<input type="checkbox"/>	74	In Process	06/10/2019	[9025] Clinical Science R&D	Jackson, Rachel	5,887.65
<input type="checkbox"/>	76	Complete	07/11/2019	Abbott Vascular Devices	Ann J Mather , Dr.	11.00
<input type="checkbox"/>	77	Preparing the order	07/23/2019	[9111] Natl Inst of Child Health & Human Dev	Jackson, Rachel	43.95
<input type="checkbox"/>	78	In Process	09/02/2020	[9111] Natl Inst of Child Health & Human Dev	Ann J Mather , Dr.	12.00
<input type="checkbox"/>	79	Order Pending	09/25/2020	[9025] Clinical Science R&D	Jackson, Rachel	85.25
<input type="checkbox"/>	80	In Process	09/25/2020	[9025] Clinical Science R&D	Ann J Mather , Dr.	2.35

Click to select the checkbox for the material order to be deleted in the far left column and click the **Delete Material Order** button (see red boxes in screenshot above).

A confirmation popup window displays.

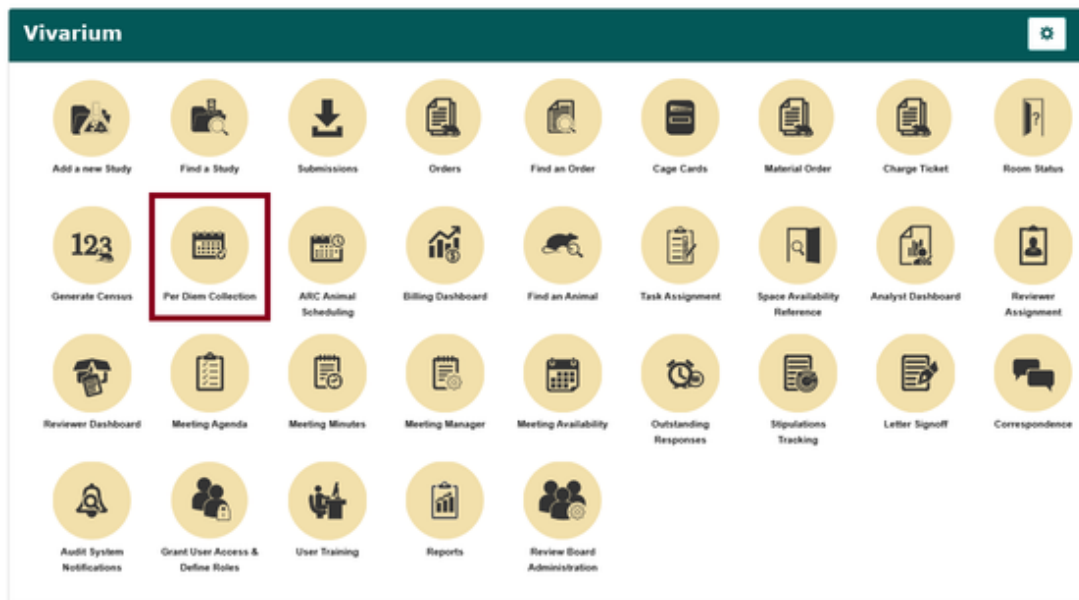


Click **CANCEL** to return to the **Manage Material Order** page without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The item is deleted on the **Manage Material Order** page.

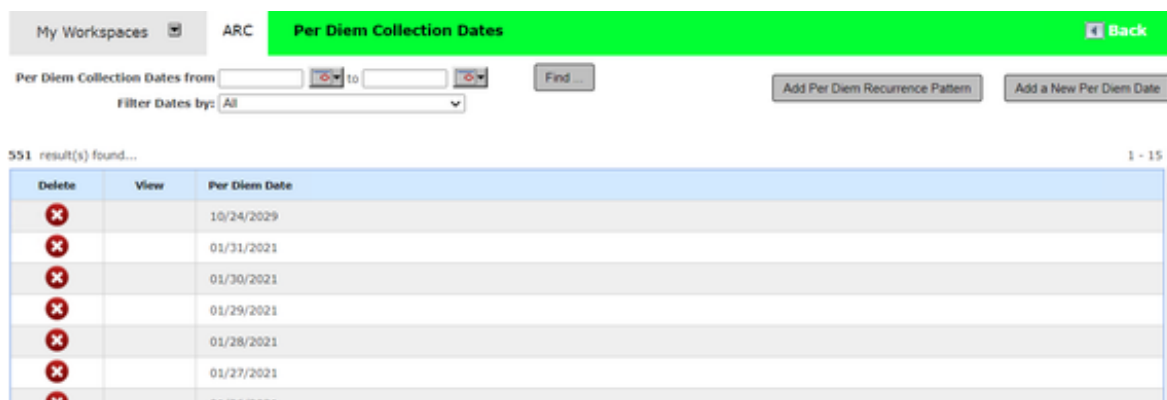
Per Diem Collection

Dates for per diem, or daily, charges for cages and related facilities are entered and managed on the **Per Diem Collection Dates** page. To access the page, navigate to ARC > ARC Workspace and click the **Per Diem Collection** icon, shown below.



Note: the user has the option to rearrange icons on this page, the **Per Diem Collection** icon may not appear in the same location on every user's ARC Workspace page.

As shown below, the **Per Diem Collection Dates** page opens.



Only **Per Diem Date** entries for future dates (screenshot above taken prior to 2/26/2021) have an icon in the **Delete** column because **Per Diem Date** entries from the past have per diem payment entries associated with them and cannot be deleted.

The entries shown in the screenshot above do not have an icon in the **View** column however, because no per diem payments have yet been entered for these entries.









Conversely, as shown in the example below, **Per Diem Date** entries from the current date (screenshot taken 10/4/20) extending into the past have an icon in the **View** column but do not have an icon in the **Delete** column. This is because once per diem payments have been entered for a given per diem date, the **Per Diem Date** record cannot be deleted.

My Workspaces ▾ ARC **Per Diem Collection Dates** [Back](#)

Per Diem Collection Dates from to

Filter Dates by:

551 result(s) found... ◀ 121 - 135 ▶

Delete	View	Per Diem Date
		10/04/2020
		10/03/2020
		10/02/2020
		10/01/2020
		09/30/2020
		09/29/2020
		09/28/2020
		09/27/2020

A search form is provided at top with fields for **Per Diem Collection Dates from [date] to [date]** and **Filter Dates by**. Enter desired search criteria and click the **Find ...** button to filter results.






Click the icon in the **View** column for a past **Per Diem Date** to view the **Per Diem Collection for [date]** page (shown below) for the selected date. Information shown on this page is read-only.

My Workspaces ▾ ARC **Per Diem Collection for 10/04/2020** [Back](#)

IACUC Number: Facility: Building:

Principal Investigator: Room:

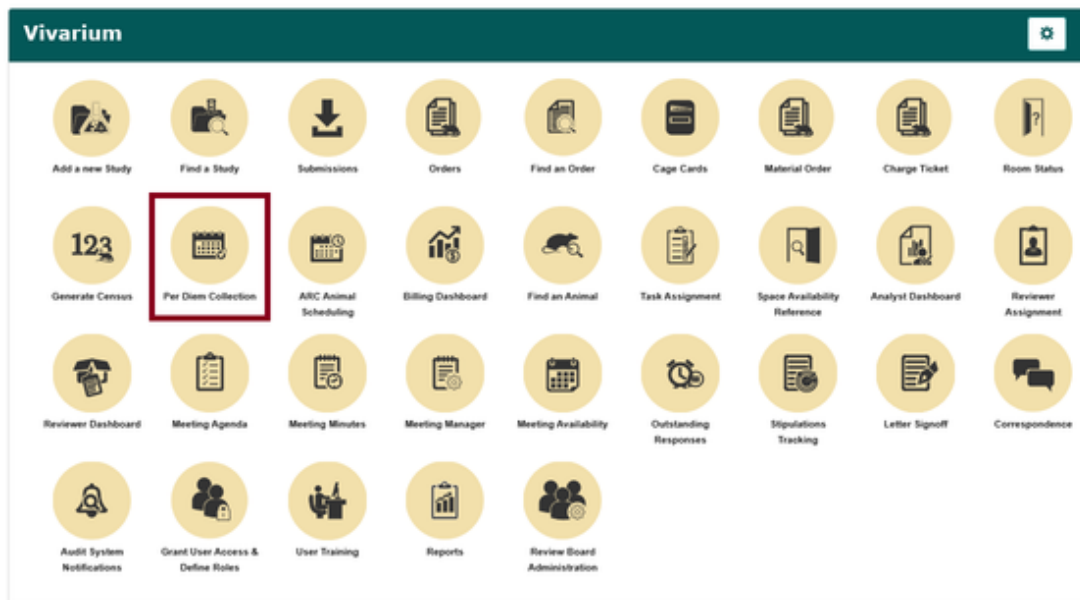
335 result(s) found...

IACUC Number	Principal Investigator	Facility Building Room	Cage ID	Cage Type	Cage Details	# of Days	Rate	Cost	Order Number	Vendor
IACUC-2019-1801	Mather, Ann J, Dc	Animal Housing Facility Building A	IACUC-2019-1801_00001	Cat Cage...		1	\$200.00	\$200.00		
		S4								
IACUC-2019-1801	Guirgus, Martin	Animal Housing Facility Redlands Building	IACUC-2019-1801_00002	Cat Cage...		1	\$200.00	\$200.00		
		100								
ANI-16-419	Mather, Ann J, Dc	ARC TEST FACILITY AM Building A	ANI-16-419_00014	Mouse Cage New		1	\$20.00	\$0.00		
		S4								
IACUC-2018-1639	Guirgus, Martin	Animal Housing Facility Redlands Building	IACUC-2018-1639_00001	Mouse Cage New		1	\$20.00	\$160.00		
		100								
		Cal Facilities								

Click the **Cancel – Return to List** button (shown in screenshot above) to close the **Pier Diem Collection for [date]** page and return to the **Per Diem Collection Dates** page.

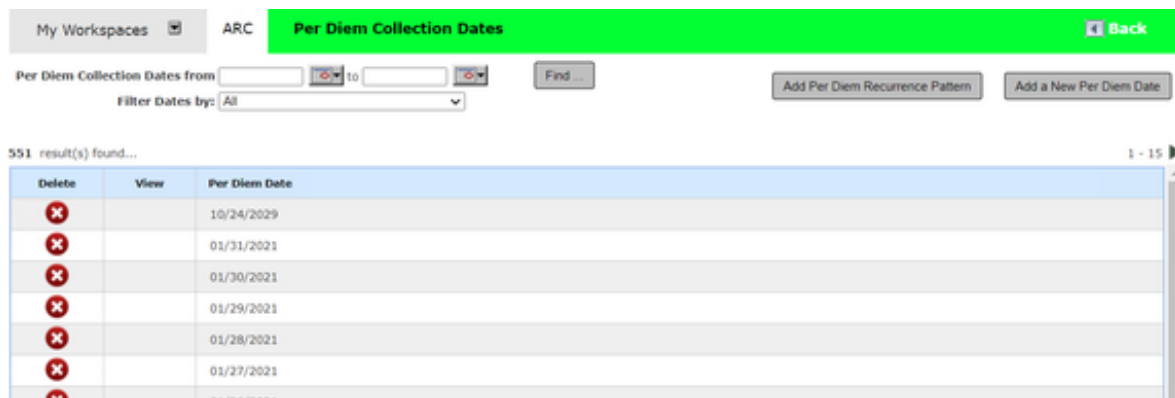
Add a New Per Diem Date

Navigate to ARC > ARC Workspace and click the **Per Diem Collection** icon, shown below.

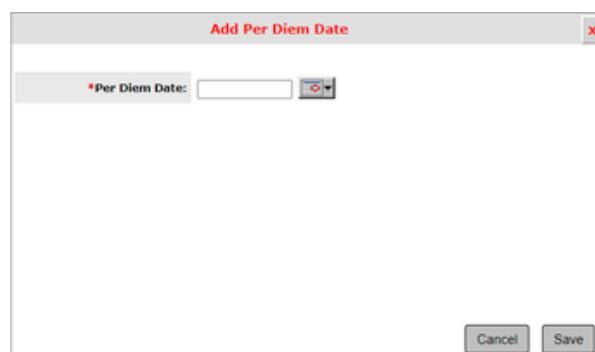


Note: the user has the option to rearrange icons on this page, the **Per Diem Collection** icon may not appear in the same location on every user's ARC Workspace page.

As shown below, the **Per Diem Collection Dates** page opens.



Click the **Add a New Per Diem Date** button to add a new per diem date. As shown below, the Add Per Diem Date popup opens for creation of the new record.

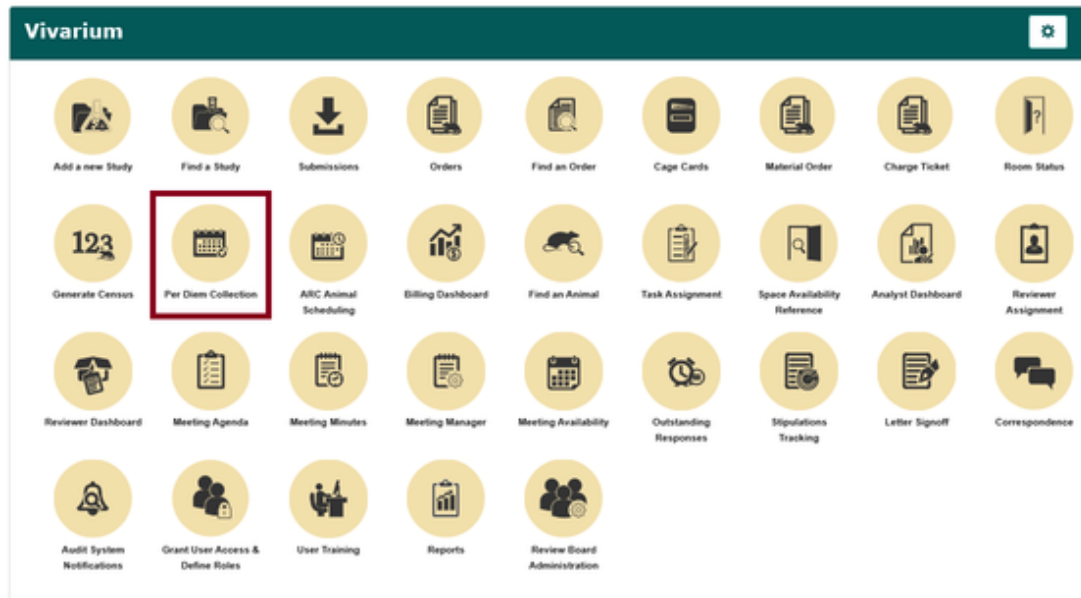


Click the calendar widget for **Per Diem Date**. Navigate to the desired date and click to select it.

Click the **Save** button to close the popup, save the new **Per Diem Date** and return to the **Per Diem Dates** page. The new date is added to list on that page.

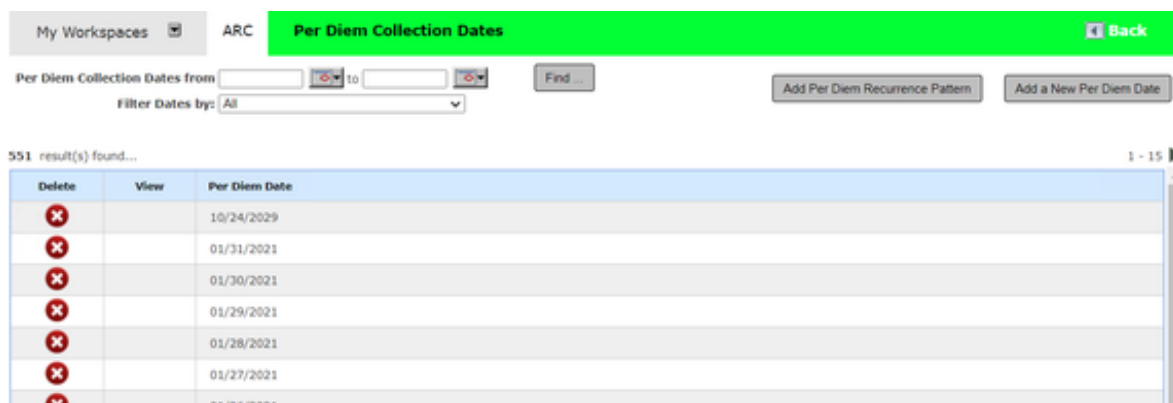
Delete a Per Diem Date

Navigate to ARC > ARC Workspace and click the **Per Diem Collection** icon, shown below.



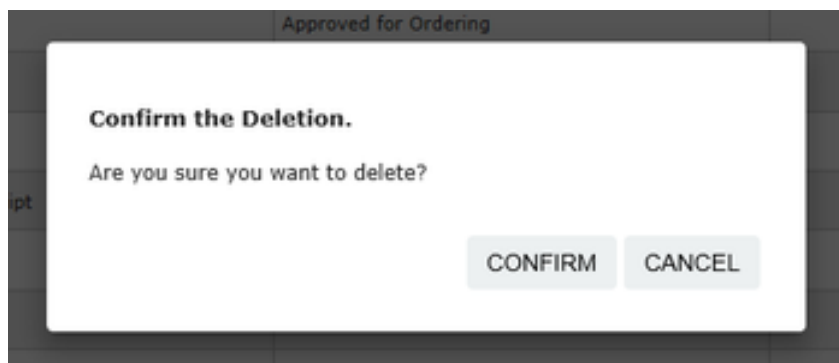
*Note: the user has the option to rearrange icons on this page, the **Per Diem Collection** icon may not appear in the same location on every user's ARC Workspace page.*

As shown below, the **Per Diem Collection Dates** page opens.



Click the icon in the **Delete** column for the applicable **Per Diem Date**.

A confirmation popup window displays.

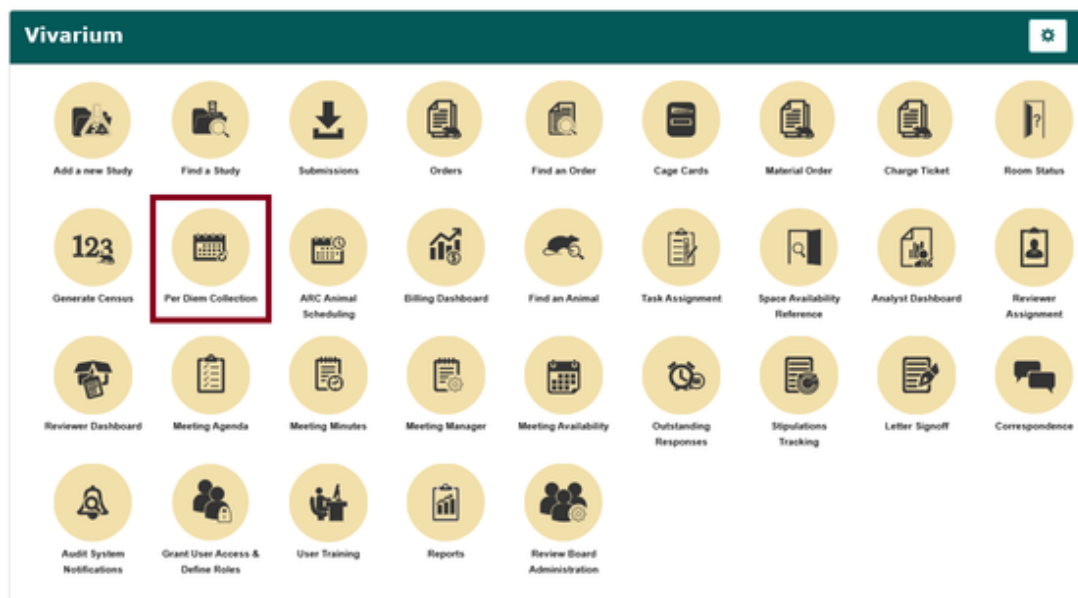


Click **CANCEL** to return to the **Per Diem Collection Dates** page without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The item is deleted on the **Per Diem Collection Dates** page.

Add a New Per Diem Recurring Pattern

Navigate to ARC > ARC Workspace and click the **Per Diem Collection** icon, shown below.



*Note: the user has the option to rearrange icons on this page, the **Per Diem Collection** icon may not appear in the same location on every user's ARC Workspace page.*

As shown below, the **Per Diem Collection Dates** page opens.

My Workspaces ▾ ARC **Per Diem Collection Dates** Back

Per Diem Collection Dates from to Find Add Per Diem Recurrence Pattern Add a New Per Diem Date

Filter Dates by:

551 result(s) found... 1 - 15 ▶

Delete	View	Per Diem Date
<input type="checkbox"/>		10/24/2020
<input type="checkbox"/>		01/31/2021
<input type="checkbox"/>		01/30/2021
<input type="checkbox"/>		01/29/2021
<input type="checkbox"/>		01/28/2021
<input type="checkbox"/>		01/27/2021
<input type="checkbox"/>		01/26/2021

Click the **Add Per Diem Recurrence Pattern** button to add a new recurring per diem charge pattern. As shown below, the **Per Diem Recurrence Schedule** page opens.

My Workspaces ▾ ARC **Per Diem Recurrence Schedule** Back

Cancel- Return to list Add a New Recurring

Delete	Edit	Recurring Pattern Name	Comments
<input type="checkbox"/>	<input type="checkbox"/>	Per Diem Collection	

As shown above, any pre-existing per diem recurrence patterns are listed in a table on the page. To add a new pattern, click the **Add a New Recurring** button.

As shown below, the **Add Per Diem Recurring Schedule** popup opens for creation of the new record.

Add Per Diem Recurring Schedule x

*Recurring Pattern Name:

*Start Date: Calendar

Comments:

Change Recurrence Pattern:

Weekly Pattern: Recurs every week(s) on:

Sunday Monday Tuesday Wednesday

Thursday Friday Saturday

Cancel Save

Enter the desired **Recurring Pattern Name**.

Click the calendar widget for **Start Date**. Navigate to the desired date and click to select it.

Enter any desired **Comments**.

Click in the **Change Recurrence Pattern** field to open a drop down list containing a “Weekly” and “Monthly” option. Click the desired option to select it. The selection made here updates the following field, which defaults to **Weekly Pattern** but dynamically updates to **Monthly Pattern** if “Monthly” is selected for **Change Recurrence Pattern**, as demonstrated below.

Change Recurrence Pattern: Monthly ▼

Monthly Pattern: Day of every month(s)

The first ▼ week day ▼ of every month(s)

Per the selection made in the **Change Recurrence Pattern** field, enter **Weekly Pattern** or **Monthly Pattern** details. Note that when configuring a weekly pattern, multiple weekday selections can be made by clicking the respective checkboxes (see screenshot below).

Weekly Pattern: Recurs every week(s) on:

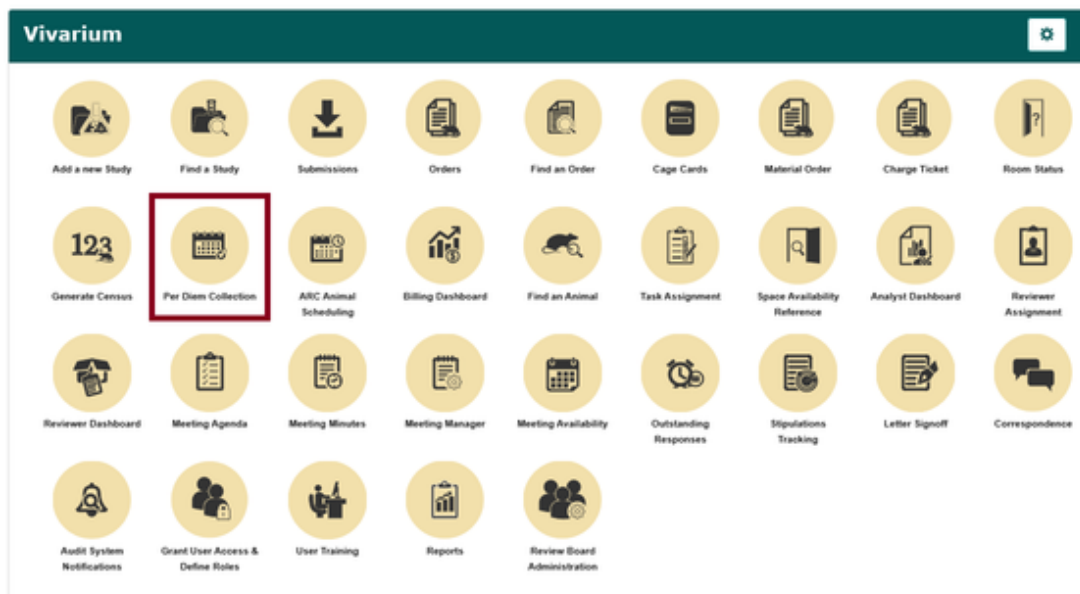
Sunday Monday Tuesday Wednesday

Thursday Friday Saturday

Click the **Save** button to close the popup, save the new **Per Diem Recurring Schedule** and return to the **Per Diem Recurrence Schedule** page. The new pattern is added to the table on that page.

Edit a Per Diem Recurring Pattern

Navigate to ARC > ARC Workspace and click the **Per Diem Collection** icon, shown below.



*Note: the user has the option to rearrange icons on this page, the **Per Diem Collection** icon may not appear in the same location on every user's ARC Workspace page.*

As shown below, the **Per Diem Collection Dates** page opens.

My Workspaces ▾ ARC **Per Diem Collection Dates** [Back](#)

Per Diem Collection Dates from to

Filter Dates by:

551 result(s) found... 1 - 15 ▶

Delete	View	Per Diem Date
<input type="button" value="✖"/>		10/24/2020
<input type="button" value="✖"/>		01/31/2021
<input type="button" value="✖"/>		01/30/2021
<input type="button" value="✖"/>		01/29/2021
<input type="button" value="✖"/>		01/28/2021
<input type="button" value="✖"/>		01/27/2021
<input type="button" value="✖"/>		01/26/2021

Click the **Add Per Diem Recurrence Pattern** button. As shown below, the **Per Diem Recurrence Schedule** page opens.

My Workspaces ▾ ARC **Per Diem Recurrence Schedule** [Back](#)

Delete	Edit	Recurring Pattern Name	Comments
<input type="button" value="✖"/>	<input type="button" value="✎"/>	Per Diem Collection	

As shown above, any pre-existing per diem recurrence patterns are listed in a table on the page.

Click the icon in the **Edit** column for the applicable **Recurring Pattern Name**. As shown below, the item is opened in the popup window for editing.

Edit Per Diem Recurring Schedule

*Recurring Pattern Name:

*Start Date:

Comments:

Change Recurrence Pattern:

Weekly Pattern: Recurs every week(s) on:

Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Make desired changes to the **Recurring Pattern Name**.

Click the calendar widget for **Start Date**. Navigate to the desired date and click to select it.

Enter or revise **Comments** as desired.

Click in the **Change Recurrence Pattern** field to open a drop down list containing a “Weekly” and “Monthly” option. Click the desired option to select it. The selection made here updates the following field, which defaults to **Weekly Pattern** but dynamically updates to **Monthly Pattern** if “Monthly” is selected for **Change Recurrence Pattern**, as demonstrated below.

Change Recurrence Pattern: Monthly

Monthly Pattern: Day of every month(s)

The first week day of every month(s)

Per the selection made in the **Change Recurrence Pattern** field, enter or revise the **Weekly Pattern** or **Monthly Pattern** details. Note that when configuring a weekly pattern, multiple weekday selections can be made by clicking the respective checkboxes (see screenshot below).

Weekly Pattern: Recurs every week(s) on:

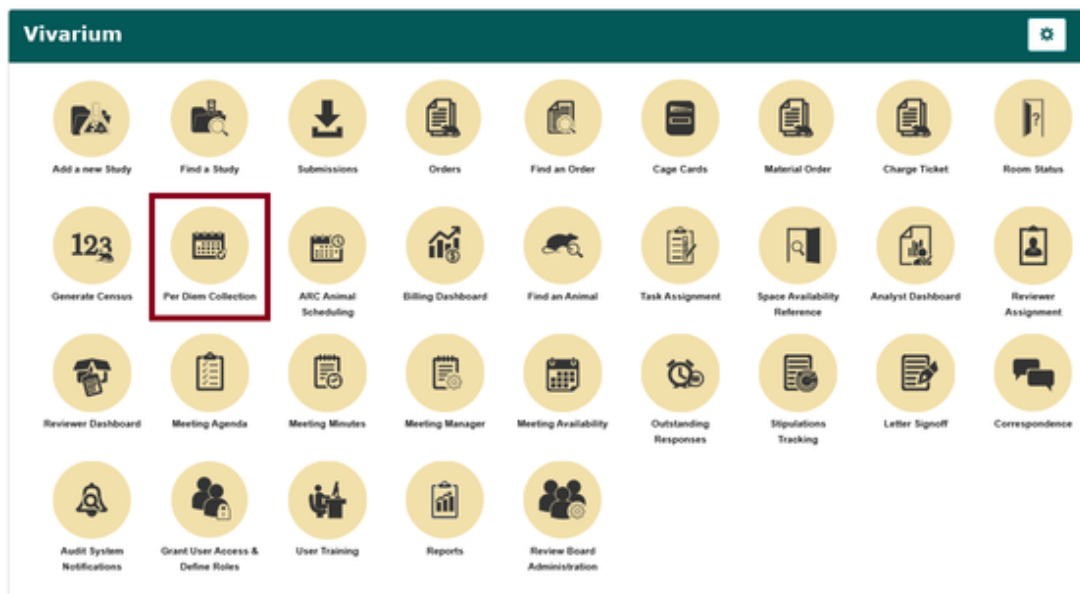
Sunday Monday Tuesday Wednesday

Thursday Friday Saturday

Click the **Save** button to close the popup, save changes to the **Per Diem Recurring Schedule** and return to the **Per Diem Recurrence Schedule** page.

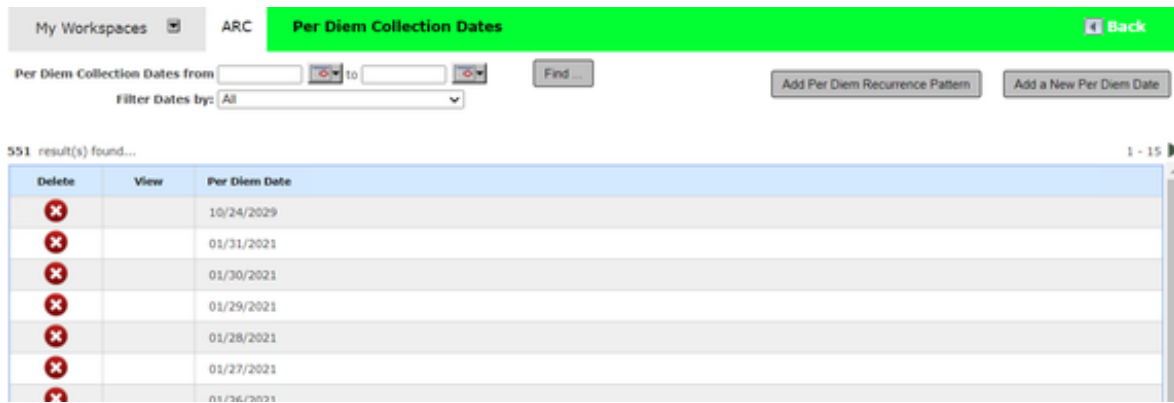
Delete a Per Diem Recurring Pattern

Navigate to ARC > ARC Workspace and click the **Per Diem Collection** icon, shown below.

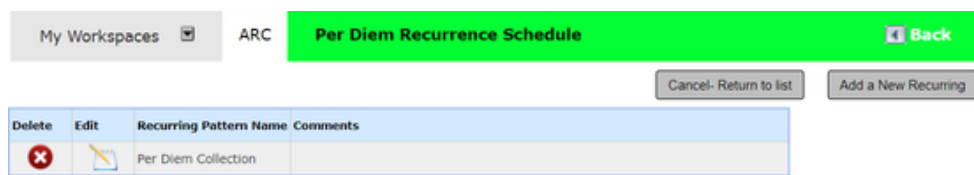


*Note: the user has the option to rearrange icons on this page, the **Per Diem Collection** icon may not appear in the same location on every user's ARC Workspace page.*

As shown below, the **Per Diem Collection Dates** page opens.



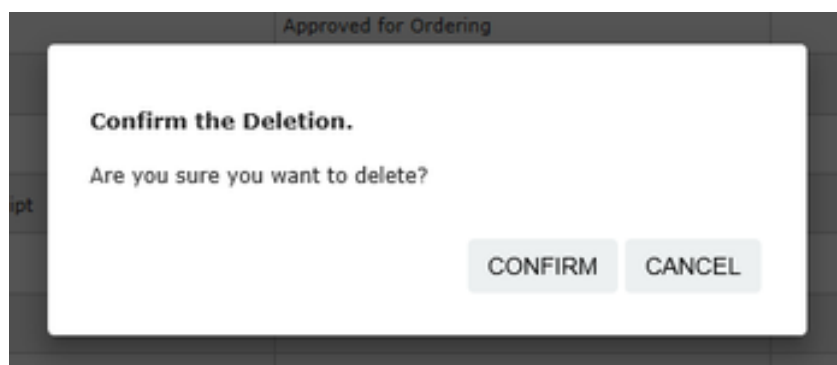
Click the **Add Per Diem Recurrence Pattern** button. As shown below, the **Per Diem Recurrence Schedule** page opens.



As shown above, any pre-existing per diem recurrence patterns are listed in a table on the page.

Click the icon in the **Delete** column for the applicable **Recurring Pattern Name**.

A confirmation popup window displays.



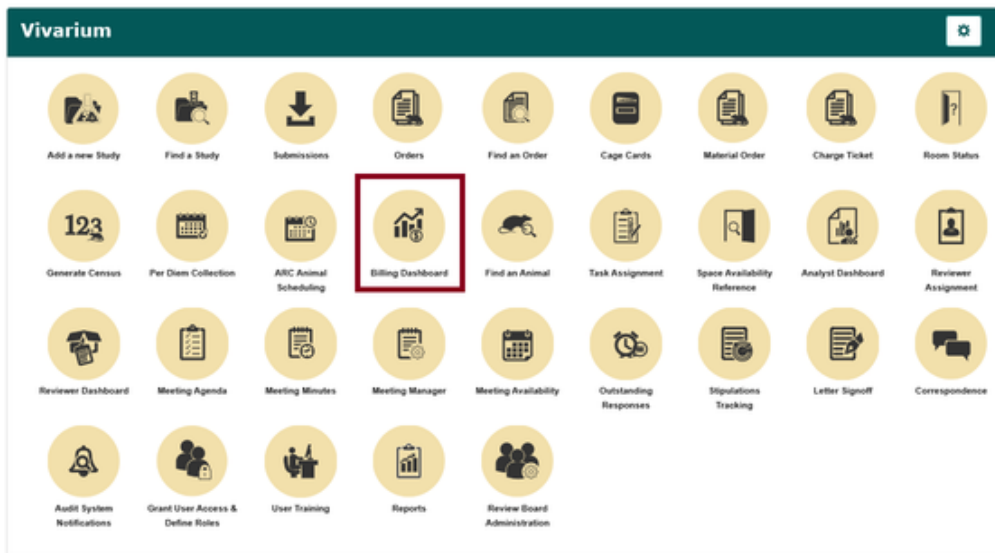
Click **CANCEL** to return to the **Per Diem Recurrence Schedule** page without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The item is deleted on the **Manage Material Order** page.

Billing Dashboard

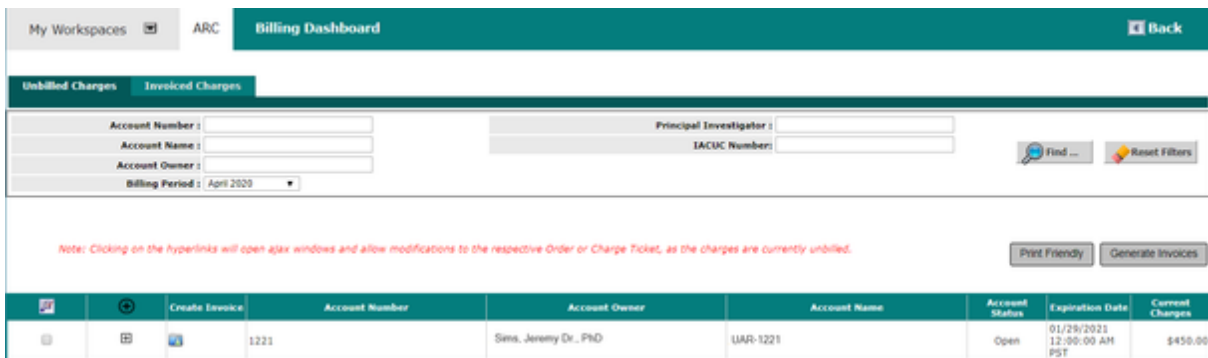
The **Billing Dashboard** area is where billing, invoice and payment items are processed and tracked.

Navigate to ARC > ARC Workspace and click the **Billing Dashboard** icon, shown below.

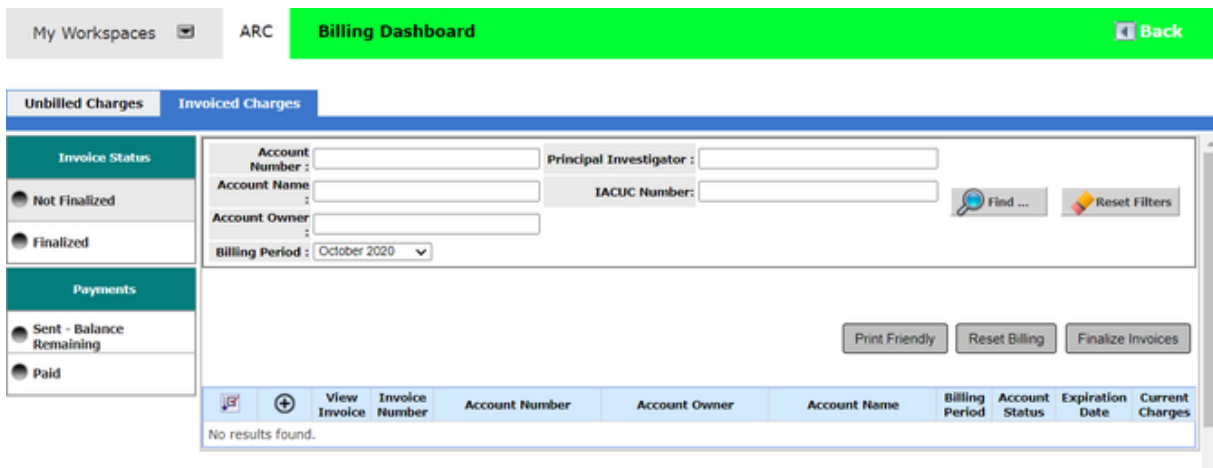


Note: the user has the option to rearrange icons on this page, the **Billing Dashboard** icon may not appear in the same location on every user's ARC Workspace page.

As shown below, the **Billing Dashboard** page opens.



The page opens to the **Unbilled Charges** tab by default. The **Invoiced Charges** tab, shown below, is where items for which invoices have been generated are processed and tracked.



View Billing Item Charge Details

Where a billing item is listed in the **Billing Dashboard** page, a plus sign icon is provided to the immediate left of the **Create Invoice** column, as shown below, for drilling down to view billing item details.

My Workspaces ▾ ARC **Billing Dashboard** Back

Unbilled Charges **Invoiced Charges**

Account Number: Principal Investigator:
 Account Name: IACUC Number:
 Account Owner:
 Billing Period: April 2020 Find ... Reset Filters

Note: Clicking on the hyperlinks will open ajax windows and allow modifications to the respective Order or Charge Ticket, as the charges are currently unbilled. Print Friendly Generate Invoices

		Create Invoice	Account Number	Account Owner	Account Name	Account Status	Expiration Date	Current Charges
			1221	Sims, Jeremy Dr., PhD	UAR-1221	Open	01/29/2021 12:00:00 AM PST	\$450.00

Click the plus sign icon to open the **Charges on this Account by Protocol** panel for the item, as shown below.

My Workspaces ▾ ARC **Billing Dashboard** Back

Unbilled Charges **Invoiced Charges**

Account Number: Principal Investigator:
 Account Name: IACUC Number:
 Account Owner:
 Billing Period: April 2020 Find ... Reset Filters

Note: Clicking on the hyperlinks will open ajax windows and allow modifications to the respective Order or Charge Ticket, as the charges are currently unbilled. Print Friendly Generate Invoices

		Create Invoice	Account Number	Account Owner	Account Name	Account Status	Expiration Date	Current Charges
			1221	Sims, Jeremy Dr., PhD	UAR-1221	Open	01/29/2021 12:00:00 AM PST	\$450.00
Charges on this Account by Protocol								
		View Details	IACUC Number	Principal Investigator	Title	Charges		
			IACUC-2020-2365	Harper, Jill Dr., MD	Recessive Allele Inheritance in House Coat Color	\$450.00		

Notice that the **Charges on this Account by Protocol** item(s) has/have a plus sign icon in the **View Details** column. Click this plus sign icon to expand a list of **Orders** associated with the applicable **Charges on this Account by Protocol** item, as shown below.

My Workspaces ▾ ARC **Billing Dashboard** Back

Unbilled Charges **Invoiced Charges**

Account Number: Principal Investigator:
 Account Name: IACUC Number:
 Account Owner:
 Billing Period: April 2020 Find ... Reset Filters

Note: Clicking on the hyperlinks will open ajax windows and allow modifications to the respective Order or Charge Ticket, as the charges are currently unbilled. Print Friendly Generate Invoices

		Create Invoice	Account Number	Account Owner	Account Name	Account Status	Expiration Date	Current Charges
			1221	Sims, Jeremy Dr., PhD	UAR-1221	Open	01/29/2021 12:00:00 AM PST	\$450.00
Charges on this Account by Protocol								
		View Details	IACUC Number	Principal Investigator	Title	Charges		
			IACUC-2020-2365	Harper, Jill Dr., MD	Recessive Allele Inheritance in House Coat Color	\$450.00		
Orders								
		Order Number	Date Delivered	Vendor	Species	Total Charges: \$450.00		
		ORD-20-801	04/07/2020 12:00:00 AM PDT	Michael Klugman	House	Costs \$450.00		

Click an item in the **Order Number** column to view the associated order record.

Note that where the plus sign icon appears next to a billing item elsewhere in the billing dashboard area, the same details as described above are available for viewing and are accessed in the same manner.

Create an Invoice

On the **Unbilled Charges** tab, click the icon in the **Create Invoice** column for the applicable item.

The screenshot shows the 'Billing Dashboard' with a search filter section containing fields for Account Number, Account Name, Account Owner, Billing Period (set to September 2020), Principal Investigator, and IACUC Number. Below the filters is a table of unbilled charges with columns for Account Number, Account Owner, Account Name, Billing Period, Account Status, Expiration Date, and Current Charges. A red box highlights the 'Create Invoice' icon in the first row of the table.

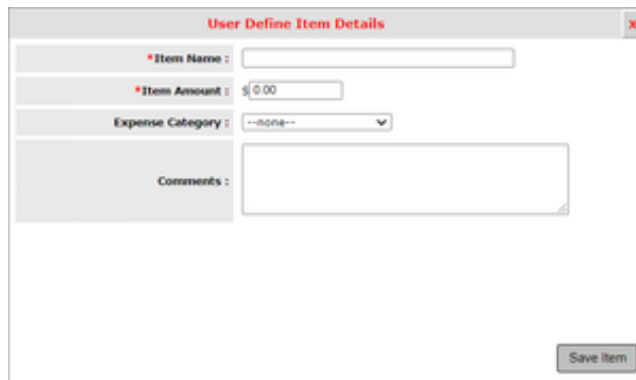
		Account Number	Account Owner	Account Name	Billing Period	Account Status	Expiration Date	Current Charges
<input type="checkbox"/>		IACUC-2018-1655	Carina , R	RES -26	09-01-2020	Open		\$125.00
<input type="checkbox"/>		8899	Mather , Ann N, B.S.	TS - 91	09-01-2020	Open	03/10/2021	\$144,330.00
<input type="checkbox"/>		55778	Mather , Ann N, B.S.	BMS -48	09-01-2020	Open		\$480.00

As shown below, the **Study Invoice** page opens for creation of an invoice. Read-only details of billing items already added to the invoice are shown in the **Charges on Account by protocol** section.

The screenshot shows the 'Study Invoice' page with fields for Invoice Number, Amount Due (\$125.00), and Remaining Balance (\$125.00). It includes a table for 'Associated Items' and a 'Charges on Account by protocol' section. The 'Charges on Account by protocol' section shows a table with columns for Order Number, Date Delivered, Vendor, Species, and Total Charges.

Order Number	Date Delivered	Vendor	Species	Total Charges
ERN 20-431	09/30/2020 12:00:00 AM PDT	Harper Lab	Mouse	\$125.00

To add a new billing item to the invoice, select the **Calculate Amount From Associated Items** checkbox if the new item is to be included in bill calculation, then click the **Add User Define Item** button in the **Associated Items** section. As shown below, the **User Define Item Details** popup opens for entry of billing item details.



User Define Item Details

*Item Name :

*Item Amount : \$ 0.00

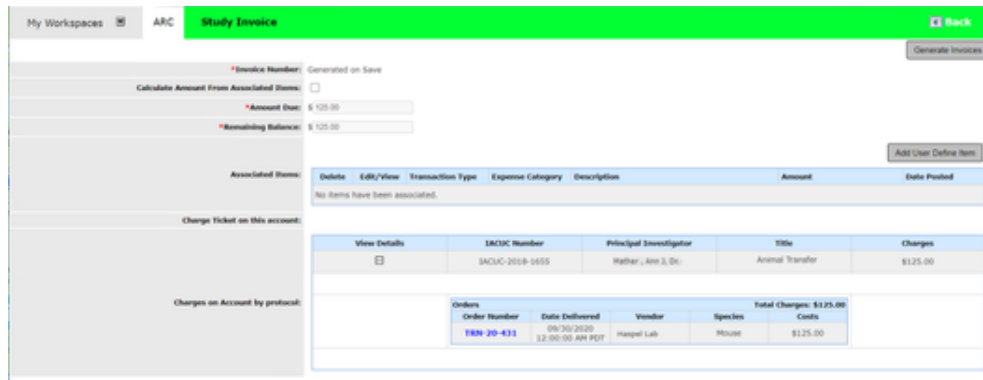
Expense Category : --none--

Comments :

Save Item

Enter the desired **Item Name**, **Item Amount** and **Comments**. Click in the **Expense Category** field to open a drop down list of categories and click on the desired item to select it. *Note that the **Expense Category** configuration list is maintained under Review Board Administration > System Setup.*

Click the **Save Item** button to save the billing item to the invoice. Items added via the popup are added to the **Associated Items** table beneath the **Add User Define Item** button.



My Workspaces ARC **Study Invoice** Back

Invoice Number: Generated on Save

Calculate Amount From Associated Items:

Amount Due: \$ 125.00

Remaining Balance: \$ 125.00

Generate Invoices

Add User Define Item

Associated Items:

Delete	Edit/View	Transaction Type	Expense Category	Description	Amount	Date Posted
No items have been associated.						

Charge Ticket on this account:

Charges on Account by protocol:

View Details	INCC Number	Principal Investigator	Title	Charges
<input type="checkbox"/>	SACUC-2018-0455	Hatler, Ann L. Dr.	Animal Transfer	\$125.00

Orders	Total Charges: \$125.00			
Order Number	Date Delivered	Vendor	Species	Costs
ERN 20-431	09/30/2020	Harper Lab	Mouse	\$125.00

Click the **Generate Invoices** button to immediately generate an invoice for the billing item that is currently open.

To generate multiple invoices, on the main **Billing Dashboard** page, **Unbilled Charges** tab, click to select the applicable Billing Period (red arrow in screenshot below). Billing items for the selected period load in the table below. Click to select the checkboxes for applicable billing items in the far left column (red box in screenshot below), then click the **Generate Invoices** button.

My Workspaces ▾ ARC **Billing Dashboard** [Back](#)

Unbilled Charges | Invoiced Charges

Account Number : Principal Investigator :
 Account Name : IACUC Number : [Find ...](#) [Reset Filters](#)
 Account Owner :
 Billing Period :

Note: Clicking on the hyperlinks will open ajax windows and allow modifications to the respective Order or Charge Ticket, as the charges are currently unbilled.

[Print Friendly](#) [Generate Invoices](#)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+	Create Invoice	Account Number	Account Owner	Account Name	Billing Period	Account Status	Expiration Date	Current Charges	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IACUC-2018-1655	Carina , R	RIS -26	09-01-2020	Open		\$125.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8899	Mather , Ann N, B.S.	TS -91	09-01-2020	Open	03/10/2021	\$144,330.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	55778	Mather , Ann N, B.S.	IMS -48	09-01-2020	Open		\$480.00	

Whether an individual invoice is generated or invoices are generated in bulk, a countdown popup briefly appears to confirm invoices are generated.

As shown below, when the countdown popup closes the selected items are removed from the **Unbilled Charges** tab and populate in the **Not Finalized** section of the **Invoiced Charges** tab for the applicable **Billing Period**.

My Workspaces ▾ ARC **Billing Dashboard** [Back](#)

Unbilled Charges | **Invoiced Charges**

Invoice Status

Not Finalized
 Finalized

Payments

Sent - Balance Remaining
 Paid

Account Number : Principal Investigator :
 Account Name : IACUC Number : [Find ...](#) [Reset Filters](#)
 Account Owner :
 Billing Period :

[Print Friendly](#) [Reset Billing](#) [Finalize Invoices](#)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+	View Invoice	Invoice Number	Account Number	Account Owner	Account Name	Billing Period	Account Status	Expiration Date	Current Charges
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing-682	8899	Mather , Ann N, B.S.	TS -91	09-01-2020	Open	03/10/2021	\$144,330.00

Click the **Print Friendly** button to open a print-friendly version of the table of invoices in a new tab or window. From there, the list can be printed in PDF format.

If a billing item is invoiced in error, click to select its checkbox (shown in screenshot above) and click the **Reset Billing** button to reset the item to an unbilled status and move it back to the **Unbilled Charges** tab.

Finalize Invoices

On the **Invoiced Charges** tab of the **Billing Dashboard**, click in the **Billing Period** field and click in the drop down list to select the desired period (red arrow in screenshot below). Invoices associated with that period populate in the table beneath the search form.

My Workspaces ARC **Billing Dashboard** [Back](#)

Unbilled Charges Invoiced Charges

Invoice Status

- Not Finalized
- Finalized

Payments

- Sent - Balance Remaining
- Paid

Account Number: Principal Investigator:

Account Name: IACUC Number:

Account Owner:

Billing Period:

[Find ...](#) [Reset Filters](#)

[Print Friendly](#) [Reset Billing](#) [Finalize Invoices](#)

	View Invoice	Invoice Number	Account Number	Account Owner	Account Name	Billing Period	Account Status	Expiration Date	Current Charges
<input type="checkbox"/>		Billing-682	8899	Mather, Ann N, B.S.	TS -91	09-01-2020	Open	03/10/2021	\$144,330.00

Use the search form at top to limit invoices shown by **Account Number**, **Principal Investigator** name, **Account Name**, **IACUC Number**, **Account Owner** and/or **Billing Period**. Click the **Find ...** button to apply filters. Click the **Reset Filters** button to clear the search form.

To finalize one or more invoices shown in the table, click to select the applicable checkbox(es) and click the **Finalize Invoices** button, as shown below.

My Workspaces ARC **Billing Dashboard** [Back](#)

Unbilled Charges Invoiced Charges

Invoice Status

- Not Finalized
- Finalized

Payments

- Sent - Balance Remaining
- Paid

Account Number: Principal Investigator:

Account Name: IACUC Number:

Account Owner:

Billing Period:

[Find ...](#) [Reset Filters](#)

[Print Friendly](#) [Reset Billing](#) [Finalize Invoices](#)

<input type="checkbox"/>	View Invoice	Invoice Number	Account Number	Account Owner	Account Name	Billing Period	Account Status	Expiration Date	Current Charges
<input checked="" type="checkbox"/>		Billing-682	8899	Mather, Ann N, B.S.	TS -91	09-01-2020	Open	03/10/2021	\$144,330.00

A countdown popup window briefly appears to confirm invoices are finalized. When the popup closes, finalized invoices are removed from the **Not Finalized** tab (shown below).

My Workspaces ARC **Billing Dashboard** [Back](#)

Unbilled Charges Invoiced Charges

Invoice Status

- Not Finalized
- Finalized

Payments

- Sent - Balance Remaining
- Paid

Account Number: Principal Investigator:

Account Name: IACUC Number:

Account Owner:

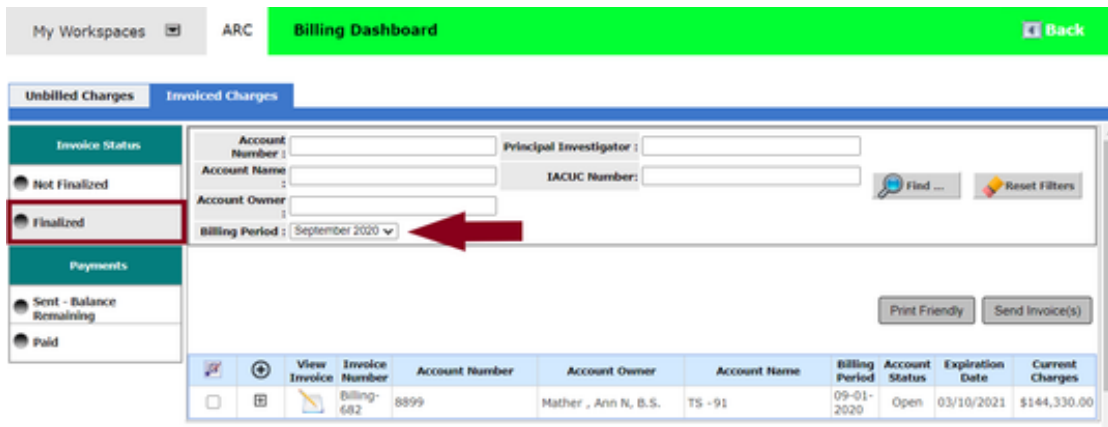
Billing Period:

[Find ...](#) [Reset Filters](#)

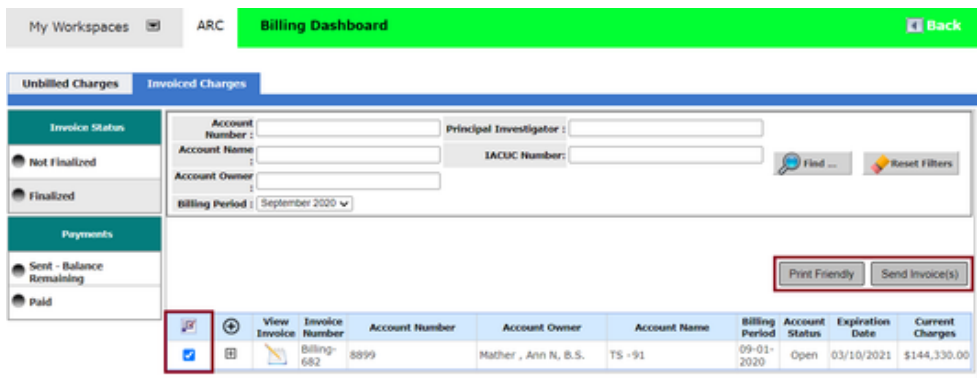
[Print Friendly](#) [Reset Billing](#) [Finalize Invoices](#)

<input type="checkbox"/>	View Invoice	Invoice Number	Account Number	Account Owner	Account Name	Billing Period	Account Status	Expiration Date	Current Charges
No results found.									

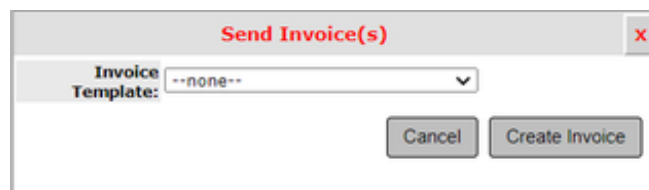
Finalized invoices populate in the **Finalized** tab (shown below) when the applicable **Billing Period** is selected.



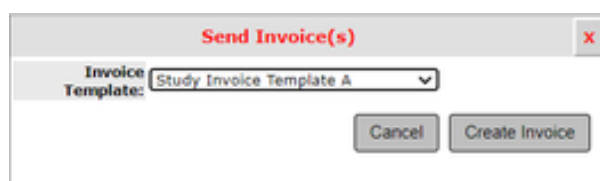
To send one of the invoices shown in the table, click to select the applicable checkbox(es) and click the **Send Invoices** button, as shown below.



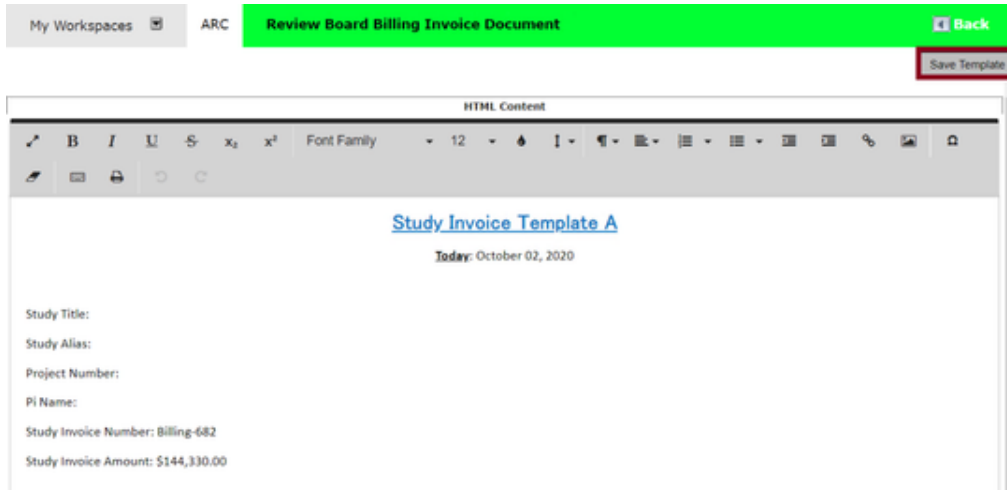
A popup window opens for selection of an **Invoice Template**. Note that this list is maintained under *Review Board Administration > System Setup*.



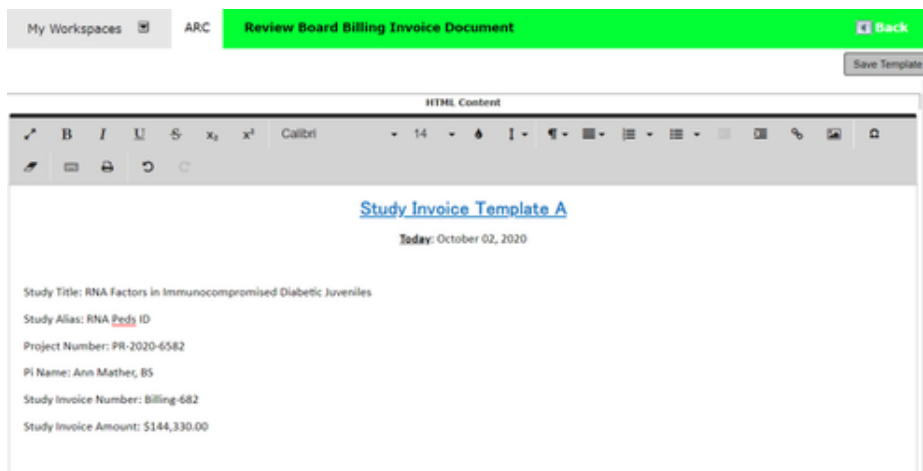
Click in the **Invoice Template** field to open a drop down list of available invoice templates. Click the desired item to select it, and click the **Create Invoice** button.



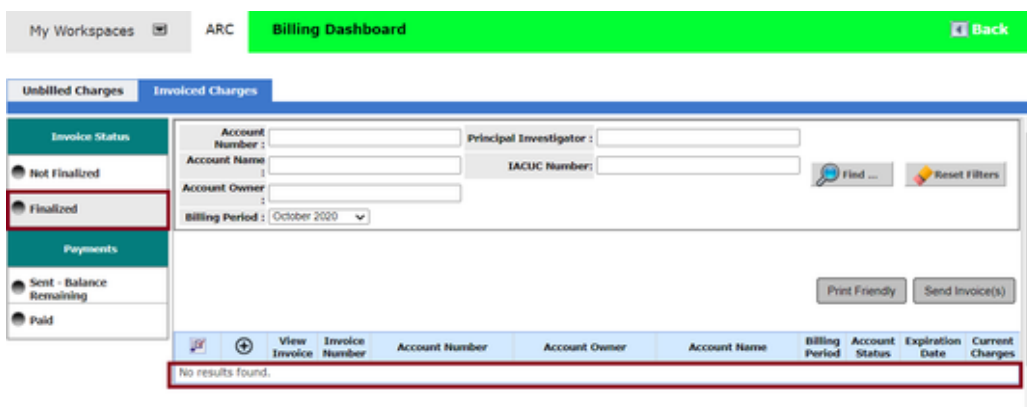
As shown below, the template is opened in a text editor.



Make desired changes to the template and click the **Save Template** button to save and send the invoice.



A countdown popup briefly appears to confirm the invoice is sent. As shown below, the invoice is removed from the **Finalized** tab.



The invoice now populates in the **Sent – Balance Remaining** tab, as shown below, awaiting entry of payments.

My Workspaces ARC **Billing Dashboard** Back

Unbilled Charges Invoiced Charges

Invoice Status

- Not Finalized
- Finalized

Payments

- Sent - Balance Remaining**
- Paid

Account Number: Principal Investigator:
Account Name: IACUC Number:
Account Owner:
Billing Period: September 2020

Find ... Reset Filters

Print Friendly

	View Invoice	Invoice Number	Invoice PDF	Account Number	Account Owner	Account Name	Billing Period	Amount Invoice	Amount Received	Remaining Balance	Date Sent
<input type="checkbox"/>		Billing-682		8899	Mather, Ann N. B.S.	TS - 91	09-01-2020	\$144,330.00	\$0.00	\$144,330.00	10/02/2020

Apply Payments to Invoices

Sent invoices for which payments are pending populate in the **Sent – Balance Remaining** tab, as shown below.

My Workspaces ARC **Billing Dashboard** Back

Unbilled Charges Invoiced Charges

Invoice Status

- Not Finalized
- Finalized

Payments

- Sent - Balance Remaining**
- Paid

Account Number: Principal Investigator:
Account Name: IACUC Number:
Account Owner:
Billing Period: September 2020

Find ... Reset Filters

Print Friendly

	View Invoice	Invoice Number	Invoice PDF	Account Number	Account Owner	Account Name	Billing Period	Amount Invoice	Amount Received	Remaining Balance	Date Sent
<input type="checkbox"/>		Billing-682		8899	Mather, Ann N. B.S.	TS - 91	09-01-2020	\$144,330.00	\$0.00	\$144,330.00	10/02/2020

Notice the plus sign icon to the left of the **View Invoice** column. Click the icon to view read-only details of the associated **Charges on this Account by Protocol** and **Orders** associated with those charges (see View Billing Item Charge Details section of this manual).

To enter payments for a billing item, click the icon in the **View Invoice** column. The invoice is opened in the **Study Invoice** page, as shown below.

My Workspaces ARC **Study Invoice** Back Save Invoice

*Invoice Number:

Calculate Amount From Associated Items:

*Amount Due: \$ 144,200.00

*Remaining Balance: \$ 144,200.00

*Complete: Yes No
Date Completed:

Associated Items:	Delete	Edit/View	Transaction Type	Expense Category	Description	Amount	Date Posted
					Test Item	\$50.00	09/24/2020 10:48:23 AM PDT

Invoice(s):	Delete	Send	Edit/View	Title	Date Sent	Status
		Send		Study Invoice Template A	10/02/2020	Invoice sent

Invoice Recipients:	Delete	Recipients	Email Address
		Wather, Ann N, B.S.	annn@gsu.com

Charge Ticket on this account:

Invoice Payments:	Delete	Edit	Amount Received	Payment Type	Ref #	Date Received	Date Posted	View Copy
No payments have been received.								

Add a New Payment

Charges on Account by protocol:	View Details	SACUC Number	Principal Investigator	Title	Charges
		DACUC-2019-1455	Wather, Ann N, B.S.	Animal Transfer	\$900.00
		DACUC-2019-1967	Wather, Ann N, B.S.	Animal Transfer	\$3,600.00
		DACUC-2019-2242	Wather, Ann N, B.S.	Animal Transfer	\$1,350.00
		DACUC-2019-2232	Wather, Ann N, B.S.	Space Allocation	\$900.00
		DACUC-2019-2261	Wather, Ann N, B.S.	Space Allocation	\$94,450.00
		DACUC-2019-2337	Wather, Ann N, B.S.	Animal Transfer	\$900.00
		DACUC-2019-2239	Wather, Ann N, B.S.	Animal Transfer	\$900.00
		DACUC-2020-2346	Wather, Ann N, B.S.	Space Allocation	\$900.00

Notice that most of the items in the page are read-only, with the exception of the **Edit/View** icon(s) in the Associated Items section and the **Add a New Payment** button.

Edit Associated Item Billing

Click the applicable icon in the **Edit/View** column to open an **Associated Items** record for editing. As shown below, the item is opened for revision in the **User Define Item Details** popup.

User Define Item Details X

*Item Name :

*Item Amount :

Expense Category :

Comments :

Save Item

Make desired changes to the **Item Name**, **Item Amount** and **Comments** fields. Click in the **Expense Category** field to open a drop down list of categories and click on the desired item to select it. Click the **Save Item** button to save changes and return to the **Study Invoice** page.

Enter a Payment

Back on the **Study Invoice** page, click the **Add a New Payment** button.

My Workspaces ARC **Study Invoice** Back Save Invoice

*Invoice Number:

Calculate Amount From Associated Items:

*Amount Due: \$ 144,200.00

*Remaining Balance: \$ 144,200.00

*Complete: Yes No
Date Completed:

Associated Items:	Delete	Edit/View	Transaction Type	Expense Category	Description	Amount	Date Posted
					Text Item	\$50.00	09/24/2020 10:48:23 AM PDT

Invoice(s):	Delete	Send	Edit/View	Title	Date Sent	Status
		Send		Study Invoice Template A	10/02/2020	Invoice sent

Invoice Recipients:	Delete	Recipients	Email Address
		Wather, Ann N, B.S.	annn@gps.com

Charge Ticket on this account: Add a New Payment

Invoice Payments:	Delete	Edit	Amount Received	Payment Type	Ref #	Date Received	Date Posted	View Copy
No payments have been received.								

Charges on Account by protocol:	View Details	SACUC Number	Principal Investigator	Title	Charges
		DACUC-2019-1455	Wather, Ann N, B.S.	Animal Transfer	\$900.00
		DACUC-2019-1967	Wather, Ann N, B.S.	Animal Transfer	\$3,600.00
		DACUC-2019-2242	Wather, Ann N, B.S.	Animal Transfer	\$1,350.00
		DACUC-2019-2232	Wather, Ann N, B.S.	Space Allocation	\$900.00
		DACUC-2019-2261	Wather, Ann N, B.S.	Space Allocation	\$96,450.00
		DACUC-2019-2337	Wather, Ann N, B.S.	Animal Transfer	\$900.00
		DACUC-2019-2329	Wather, Ann N, B.S.	Animal Transfer	\$900.00
		DACUC-2020-2346	Wather, Ann N, B.S.	Space Allocation	\$900.00

As shown below, the **Invoice Payment Details** popup opens for entry of payment details.

Invoice Payment Details X

*Amount Received:

*Date Received: Calendar

*Payment Type:

*Ref #:

*Date Posted: Calendar

Copy of the Payment:
(Microsoft Word, RTF or PDF file only)

Save Payment

Enter the **Amount Received**.

Click the calendar widget for **Date Received** and click the applicable date to select it.

Invoice Payment Details X

*Amount Received:

*Date Received: Calendar

*Payment Type: Cash
Check
Credit Card
Money Order

*Ref #:

*Date Posted: Calendar

Copy of the Payment:
(Microsoft Word, RTF or PDF file only)

Save Payment

Click in the **Payment Type** field to open it (shown above) and click to select the applicable item.

Enter the desired **Ref #** (reference number).

The **Date Posted** field defaults to the current date.

To add documentation of the payment, click the **Upload** button and follow the prompts to upload a document from the computer desktop or file manager.

An example of the filled popup is shown below.

Invoice Payment Details

* Amount Received: \$ 350.00

* Date Received: 10/01/2020

* Payment Type: Check

* Ref #: 625-541

* Date Posted: 10/02/2020

Copy of the Payment: Upload ... ARC Invoices payment 9.00.pdf
(Microsoft Word, RTF or PDF file only)

Save Payment

Click the **Save Payment** button to apply the payment. As shown below, the payment is added in the Invoice Payments section of the **Study Invoice** page.

My Workspaces ARC **Study Invoice** Back

Invoice Number: Billing-002

Calculate Amount From Associated Items:

* Amount Due: \$ 144,330.00

* Remaining Balance: \$ 143,980.00

Complete: Yes No

Date Completed: [Calendar]

Delete	Edit/View	Transaction Type	Expense Category	Description	Amount	Date Posted
				Test Item	\$50.00	09/24/2020 10:46:23 AM PDT

Delete	Send	Edit/View	Title	Date Sent	Status
	Send		Study Invoice Template A	10/02/2020	Invoice sent

Delete	Recipients	Email Address
	Mathur, Anu N. B.S.	amathur@medrx.com

Charge Ticket on this account:

Invoice Payments:

Delete	Edit	Amount Received	Payment Type	Ref #	Date Received	Date Posted	View Copy
		\$350.00	Check	625-541	10/01/2020	10/02/2020	

View Details	IACUC Number	Principal Investigator	Title	Charges
<input type="checkbox"/>	IACUC-2018-1655	Mathur, Anu J. Dr.	Copy of Test for Animal Transfer	\$900.00
<input type="checkbox"/>	IACUC-2019-1967	Mathur, Anu J. Dr.	Test for ARC - 5/16/2019	\$3,600.00
<input type="checkbox"/>	IACUC-2019-2242	Mathur, Anu J. Dr.	Test Signoffs-7/28/2019	\$1,350.00
<input type="checkbox"/>	IACUC-2019-2252	Mathur, Anu J. Dr.	PI Sign off -8/1/2019	\$900.00
<input type="checkbox"/>	IACUC-2019-2261	Mathur, Anu J. Dr.	Test for PI Sign off 8062019	\$96,450.00
<input type="checkbox"/>	IACUC-2019-2337	Mathur, Anu J. Dr.	Test for Animal Study Type Configuration List -12/20	\$900.00
<input type="checkbox"/>	IACUC-2019-2339	Mathur, Anu J. Dr.	Test 12/20	\$900.00
<input type="checkbox"/>	IACUC-2020-2346	Mathur, Anu J. Dr.	Space Allocation -1/22	\$900.00
<input type="checkbox"/>	IACUC-2020-2348	Mathur, Anu J. Dr.	Anu's Test for 2121 -79(IACUC	\$420.00

If a payment is posted in error, click the applicable icon in the **Delete** column of the **Invoice Payments** section to delete it. Note that audit log entries will reflect this change.

To edit a payment, click the applicable icon in the **Edit** column of the **Invoice Payments** section of the **Study Invoice** page.

Invoice Payments:	Delete	Edit	Amount Received	Payment Type	Ref #	Date Received	Date Posted	View Copy
			\$350.00	Check	625-541	10/01/2020	10/02/2020	

As shown below, the payment is opened for revision in the **Invoice Payment Details** popup.

Invoice Payment Details X

* Amount Received:

* Date Received:

* Payment Type:

* Ref #:

* Date Posted:

Copy of the Payment: ARC Invoices payment 9.00.pdf
(Microsoft Word, RTF or PDF file only)

Make desired changes and click the **Save Payment** button to save changes and close the popup.

Notice that payments entered are added to the **Amount Received** column for the applicable invoice on the **Sent – Balance Remaining** tab, as shown below.

My Workspaces ARC Billing Dashboard Back

Unbilled Charges | **Invoiced Charges**

Invoice Status

Not Finalized

Finalized

Payments

Sent - Balance Remaining

Paid

Account Number:

Account Name:

Account Owner:

Billing Period:

Principal Investigator:

IACUC Number:

	View Invoice	Invoice Number	Invoice PDF	Account Number	Account Owner	Account Name	Billing Period	Amount Invoice	Amount Received	Remaining Balance	Date Sent
<input type="checkbox"/>		Billing-682		8899	Mather, Ann N, B.S.	TS - 91	09-01-2020	\$144,330.00	\$350.00	\$144,330.00	10/02/2020

Complete and Close Invoices

When the final payment is entered on an invoice, scroll back to the top of the Study Invoice page (shown below) to close out the invoice and move it to the **Paid** tab. Click the radio button to select “Yes” for **Complete**, click the calendar widget

for **Date Completed** and navigate to the current date to select it, then click the **Save Invoice** button to save changes.

My Workspaces | ARC | **Study Invoice** | Back

Invoice Number: Billing-052

Calculate Amount From Associated Items:

Amount Due: \$ 144,330.00

Remaining Balance: \$ 143,980.00

Complete: Yes No

Date Completed:

Save Invoice

When the final payment is applied to an invoice and it is marked **Complete**, the invoice moves from the **Sent – Balance Remaining** tab to the **Paid** tab (example shown below).

My Workspaces | ARC | **Billing Dashboard** | Back

Unbilled Charges | Invoiced Charges

Invoice Status

- Not Finalized
- Finalized

Payments

- Sent - Balance Remaining
- Paid**

Account Number: Principal Investigator:

Account Name: IACUC Number:

Account Owner:

Billing Period:

Find ... | Reset Filters

Download All Completed Invoices as a Single File: PDF WORD | Generate Document | Print Friendly

View	Invoice	Invoice	Account	Account	Account	Billing	Amount	Amount	Remaining	Date
Invoice	Number	PDF	Number	Owner	Name	Period	Invoice	Received	Balance	Sent
No results found.										

Invoices in the **Paid** tab can be opened as read-only, but cannot be revised.