

Generation and Use of Procedures in the eIACUC Software Solution

The successful submission of a protocol in the eIACUC system involves the effective use of Procedures. There are two types of procedures found in the solution as identified below:

Standard Procedures: are pre-approved by the IACUC and thus can be used, if appropriate, by any investigator in writing a protocol. Standard procedures cannot be edited by the PI or research team and must be followed as written. There are three generally used mechanisms to generate Standard Procedures:

- a) Development of acceptable Standard Procedures by the IACUC based on “best practice.” There are a large number of Standard Procedures that have been created in this manner.
- b) Development of Standard Procedures based on requests from the research community. These requests can be made directly to the IACUC office. Some Standard Procedures have been created in this manner.
- c) Promotion of team procedures to Standard. Members of the research community can nominate a team procedure for consideration by contacting the IACUC office directly with the request (email preferred). Some Standard Procedures have been created in this manner.

Team Procedures: are created by the researcher and are subject to review at submission of the protocol in which they occur. Once the parent protocol is approved, the version of any Team Procedure used on this protocol is also approved as a “Team Procedure”. Revisions and/or new versions of Team Procedures can be made through the processes indicated below. Once approved, Team Procedures can be added to other protocols but are still subject to review. If requests are made to revise a Team Procedure a researcher may:

- a) Ask for clarification from reviewers or help from the IACUC office prior to making revisions. This may be especially relevant when a Team Procedure has been approved on other protocols previously.
- b) Copy the procedure and create a new version of the procedure. NOTE: in this case the currently approved version of a procedure is not affected and remains in the approved state. This may be especially helpful when adjustments are required in the current version, but the older procedure is not/does not need to be revised.
- c) Create a new version of the Team Procedure. NOTE: in this case the existing version of the procedure becomes “archived” not only for this protocol, but also for any other approved protocol on which it is currently approved. This process may be required if the procedure needs to be revised “across the board” for any number of reasons. In this case approved protocols with this archived version would also need to be revised to replace the old version with the new one

Identification of Standard and Team Procedures from your Research Team Page

1) Navigate to “my inbox” and click on your research team

The screenshot shows the 'My Inbox' page for an IACUC application. On the left, there is a sidebar with 'My Roles' (Registered User, Study Staff) and 'My Research Teams'. A blue arrow points to a box labeled 'Research team name' in the 'My Research Teams' section. The main content area contains a welcome message and a list of guidelines for processing studies.

2) From your Research Team, click on the Procedures button. This will show all procedures available to you, both Team and Standard. You can sort using any of the columns in blue to reorder selections

The screenshot shows the 'Research Team Details' page. The 'Procedures' tab is selected and highlighted with a red box. A blue arrow points to the 'Procedures' tab. The page displays a table of procedures with columns for Name, Execute Activity, Date Modified, State, Version, Species, Procedure Type, and Scope. The table is filtered by Name.

3) The procedures may be searched by using the “filter by” tool. The example below shows how to use the filters to search for all available Standard procedures for euthanasia in NHP.

The screenshot shows the 'Procedures' page with a search filter applied. The filter is set to Species: NHP, Scope: standard, and Procedure Type: %euth. The resulting table shows three items:

Name	Execute Activity	Date Modified	State	Version	Species	Procedure Type	Scope
Euthanasia-Barbiturate Overdose	Actions	9/4/2018 1:36 PM	Active	1	NHP: Rhesus Macaque	Euthanasia	Standard
Euthanasia-Barbiturate Overdose	Actions	8/8/2018 11:04 AM	Active	1	NHP: Cynomolgus	Euthanasia	Standard
Euthanasia-Barbiturate Overdose	Actions	8/8/2018 10:32 AM	Active	1	NHP: Pigtail Macaque	Euthanasia	Standard

4) To perform a search by key words within the title of a protocol use the % at the front of the key word you are looking to find. For example, if you want to find all procedures for performing

lymph node biopsy independent of species or scope use the term %lymph as seen below. Note that in this case you locate both team and standard procedures that fit this criterion.

The screenshot shows a search interface with a filter set to 'Name' and the search term '%lymph node'. The results table contains 7 items, all with 'Active' status and 'Standard' scope. The columns are: Name, Execute Activity, Date Modified, State, Version, Species, Procedure Type, and Scope.

Name	Execute Activity	Date Modified	State	Version	Species	Procedure Type	Scope
Lymph Node Biopsy	Actions ▾	10/11/2018 7:57 AM	Active	1	NHP: Rhesus Macaque	Sample or Data Collection	Team
Lymph Node Biopsies	Actions ▾	6/28/2018 10:42 AM	Active	1	NHP: Pigtail Macaque	Sample or Data Collection	Standard
Lymph Node Biopsies	Actions ▾	6/28/2018 10:41 AM	Active	1	NHP: Cynomolgus	Sample or Data Collection	Standard
Lymph Node Fine Needle Aspirates (Inguinal and Axillary Lymph Nodes)	Actions ▾	6/28/2018 10:36 AM	Active	1	NHP: Cynomolgus	Sample or Data Collection	Standard
Lymph Node Fine Needle Aspirates (Inguinal and Axillary Lymph Nodes)	Actions ▾	6/28/2018 10:35 AM	Active	1	NHP: Pigtail Macaque	Sample or Data Collection	Standard
Lymph Node Fine Needle Aspirates (Inguinal and Axillary Lymph Nodes)	Actions ▾	6/28/2018 9:47 AM	Active	1	NHP: Rhesus Macaque	Sample or Data Collection	Standard
Lymph Node Biopsies	Actions ▾	6/28/2018 9:47 AM	Active	1	NHP: Rhesus Macaque	Sample or Data Collection	Standard

CRITICAL NOTE: Use of the % sign as a “wild-card” allows the system to pull all procedures with that phrase anywhere in the title. This is critical for finding relevant procedures, despite the naming methodology.

Note also that you do not need to use the entire search term, but only part of it (i.e. euth not euthanasia in the example under point #3 above)

Identification and Use of Standard Procedures (WITHIN PROTOCOL SUBMISSIONS)

1) Procedures (both Standard and team) can be added to protocols from within a submission. To do so first create and open an experiment using the add icon as seen below.

Experiments

If the procedure is not yet created: [Create Procedure](#)

Important! Make sure you assign your new procedures to the appropriate experiments.

1. * Define the experiments to be used in this protocol:

The screenshot shows a red-bordered button with a plus sign and the text '+ Add'. Below it is a table header with columns: Name, Species, USDA Count, Count by Pain Category, Common Procedures, and Husbandry Exceptions.

2) Once the experiment has been added, the page for experimental details will appear. Question 5 is where you can search for and add procedures as seen below.

The screenshot shows a search box with the text '5. Select procedures: ?'. Below the search box is a table header with columns: Name, Type, Unrelieved Pain or Distress, Version, and Scope. Below the header, it says 'There are no items to display'.

3) Method 1 to add procedures: Use the text field and the % wild-card to find procedures of interest. NOTE: In this case only procedures for the selected strain for the experiment (in this case mice) will be available.

5. Select procedures: ?

<input type="text" value="%Co2 "/> <input type="button" value="X"/> <input type="button" value="..."/>				
Name	Type	Version	Species	Scope
CO2 Asphyxiation-Mice	Euthanasia	1	Rodent: Mouse	Standard

4) Method 2 to add procedures: Click on the ... icon to open the field seen below. Then use the filter functionality in the same manner as above. Click the open box on the left-hand side to select, then click OK to add

Select One or More Procedure Projects

Filter by Name

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Name	Type	Version	Species	Scope
<input type="checkbox"/> CO2 Asphyxiation-Mice	Euthanasia	1	Rodent: Mouse	Standard

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