

Placing Animal Orders Using the *EnCCoMPass Animal Module*

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Placing Animal Orders Using the *EnCCoMPass Animal Module*

Purpose:

This guideline will describe the process for ordering animals from approved vendors in addition to the process for importing animals from collaborators at other institutions. This document will also provide instructions on:

1. Canceling an order.
2. Replicating an order.
3. Determining the status of an order.
4. The use and functionality of reports with the Animal Module.

Log into EnCCoMPass:

1. Log into EnCCoMPass via
 - a. (MSKCC) <http://enccompass.mskcc.org> and use your MSKCC login and password.
 - b. (WCMC) <http://enccompass.med.cornell.edu> and use your CWID and password.
2. Once you are logged into *EnCCoMPass* you will see the following **Home Page Dashboard** (Figure 1)

Home Page Dashboard:

1. The **Home Page Dashboard** provides the status of items that are pending action from you, as well as notifications of actions that have been taken for all of the *EnCCoMPass* modules, including Animal (Figure 1) (blue box).

Note:

- i. All notifications that appear on this page have also been sent to you via e-mail. A link within the e-mail will enable you to address any issues that require action.
- ii. Similarly, selecting the **Proceed** hyperlink (Figure 1) (red box) from the Home Page will take you to the location within *EnCCoMPass* where your action is needed.
- iii. Respective to each module, the top 5 most recent notifications will be present on this **Home Page Dashboard**, if you select the **Proceed** hyperlink and receive an error it is because no further action is required.

The screenshot displays the EnCCoMPass Home Page Dashboard. At the top, the user is logged in as Jason North. The dashboard is divided into three main sections: Protocol, Animal, and Billing. The 'Animal' section is highlighted with a blue box. Within the 'Animal' section, the 'Proceed' link for the first notification is highlighted with a red box. The dashboard shows notifications for Protocol, Animal, and Billing modules.

EnCCoMPass

Logged as: Jason North | [Logout](#)
[Contact Us](#) | [Help](#) | [Institution](#)

Home | Protocol | Census | **Animal** | Billing

Home

Protocol

Friday, 04 October 2013 10:04:23 [Proceed](#)
The status of your protocol: 13-09-010, Heat/Shock proteins and their role in DNA repair has changed to Approved.

Friday, 04 October 2013 10:03:52 [Proceed](#)
The following protocol has been submitted for approval: Amendment, North, Jason, 13-09-010.

Friday, 27 September 2013 12:59:12 [Proceed](#)
The status of your protocol: 13-09-010, Heat/Shock proteins and their role in DNA repair has changed to Approved.

Friday, 27 September 2013 12:30:22 [Proceed](#)
The following protocol has been submitted for approval: Amendment, North, Jason, 13-09-010.

Wednesday, 25 September 2013 17:41:51 [Proceed](#)
The status of your protocol: 13-09-010, Test Protocol #2 has changed to Approved.

Animal

Friday, 04 October 2013 17:38:54 [Proceed](#)
A New Animal Requisition Created: Q00000067.

Friday, 04 October 2013 16:47:00 [Proceed](#)
A New Animal Requisition Created: Q00000066.

Friday, 04 October 2013 16:44:06 [Proceed](#)
A New Animal Requisition Created: Q00000065.

Friday, 04 October 2013 16:37:18 [Proceed](#)
A New Animal Requisition Created: Q00000064.

Friday, 04 October 2013 16:29:57 [Proceed](#)
A New Animal Requisition Created: Q00000063.

Billing

Thursday, 10 October 2013 09:06:34 [Proceed](#)
Some invoices were not sent to TIPS

Thursday, 10 October 2013 08:06:39 [Proceed](#)
Some invoices were not sent to TIPS

Thursday, 10 October 2013 07:06:31 [Proceed](#)
Some invoices were not sent to TIPS

Thursday, 10 October 2013 06:06:27 [Proceed](#)
Some invoices were not sent to TIPS

Thursday, 10 October 2013 05:06:31 [Proceed](#)
Some invoices were not sent to TIPS

Figure 1

Placing Animal Orders Using the *EnCCoMPass Animal Module*

2. At top of the [Home Page Dashboard](#), you will see tabs of the four different modules that make up the [EnCCoMPass Application](#) ([Figure 2](#)).

Note: Additional modules will be developed and released over time.

- a. The modules/tabs are as follows:
 - i. Protocol
 - ii. Census
 - iii. Animal
 - iv. Billing



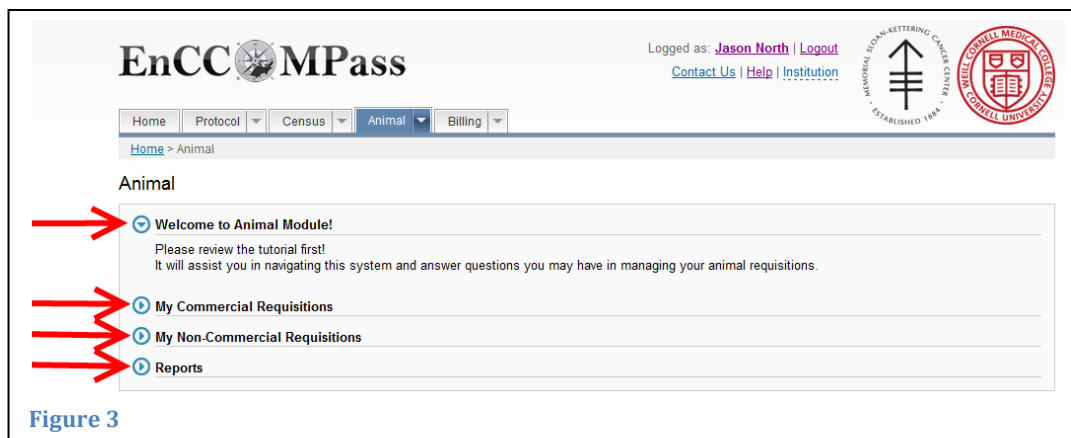
Figure 2

- b. When you access *EnCCoMPass* with your user ID, however, you may not see all of these tabs as access is dependent upon the role(s) you have been assigned within the application.
- c. If you do not see the [Animal](#) tab and you require the ability to order animals, your **PI or PI designee** is required to add you as an animal requisitioner in his or her *EnCCoMPass* Protocol. (Refer to [How to make personnel changes in EnCCoMPass](#); please use the appropriate institutional hyperlink [MSKCC](#) or [WCMC](#) for detailed instructions)

Animal Module:

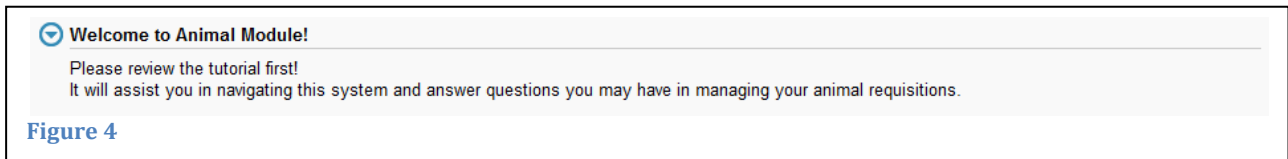
1. To access the Animal module select the [Animal](#) tab as circled blue in ([Figure 1](#)).
2. Once the Animal tab has been selected you will be directed to the [Animal module dashboard](#). From this dashboard you have the ability to place a commercial or non-commercial requisition for animals. You will also find a list of the 10 most recent requisitions that have been placed. The dashboard is comprised of the following features:

Note: Select the blue arrow next to each feature to toggle for more information ([Figure 3](#)) (red arrows).

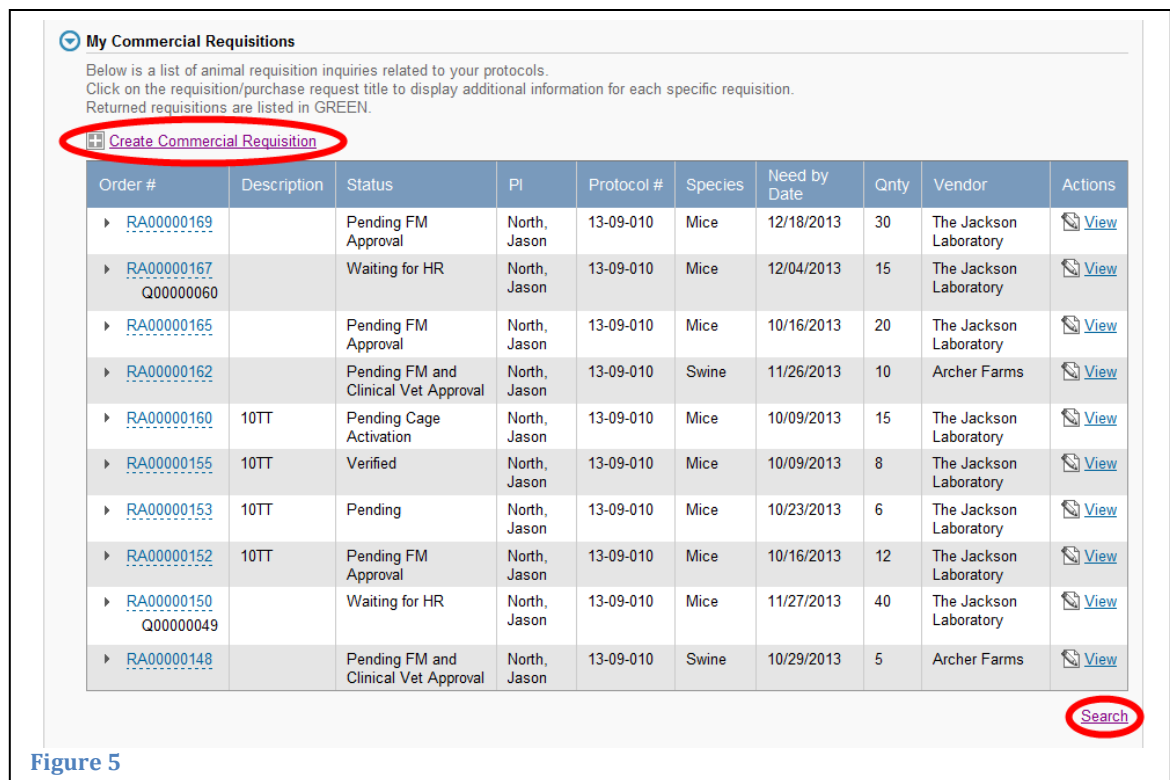


Placing Animal Orders Using the *EnCCoMPass Animal Module*

- a. **Welcome to the Animal Module:** This area will provide links to presentations, guidelines, and FAQ's regarding the use and functionality of the features in the Animal module (Figure 4).



- b. **My Commercial Requisitions:** Create a new **Commercial** requisition, view further details regarding a requisition, view a summary of the requisition or search existing **Commercial** requisitions (Figure 5).
- i. A **Commercial** requisition is an order in which the Requisitioner will be charged for the animals ordered, e.g., ordering animals from a commercial vendor such as Jackson Laboratories or Charles River.



- ii. **Animal module dashboard column heading descriptions:**
- i. **Order #:** This is a unique identifier in the format of **RA12345678** at **MSKCC** and in the format of **REQ12345678** at **WCMC**.
1. Selecting the sideways arrow or the **Order #** hyperlink (Figure 6) (red circle) will provide more detail regarding the order as shown in (Figure 6) (blue box).
- ii. **Description:** Free text description entered by the Requisitioner during the order process to assist in finding the order. This is not a required field; the description is only for the benefit of the Requisitioner and will not be used by RARC in any way.
- iii. **Status:** Description of the status of the order.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

1. **Draft:** An order which has been partially completed and has not been submitted yet.
2. **Cancelled:** An order which has been cancelled by the RARC Buyer based on a request by the Requisitioner.
3. **Pending Cancellation:** An order which has been requested to be canceled by the Requisitioner.
4. **Disapproved:** An order which has been disapproved by the Facility Manager, the Clinical Veterinarian or the Biosecurity Veterinarian.
5. **Pending:** An order has been submitting and is awaiting review, verification and submission to vendor from RARC Buyer.
6. **Pending Facility Manager Approval:** An order has been submitted and is awaiting housing room assignment or confirmation by the Facility Manager.
7. **Waiting for Health Report:** An order that requires quarantine and the health report has not been uploaded or sent to the Biosecurity Veterinarian yet.
8. **Verified:** An order has completed review by the RARC Buyer and is waiting to be sent to the vendor.
9. **Submitted to Vendor:** An order has been submitted to the vendor.
10. **Order Confirmed:** The vendor has sent an order confirmation to RARC Buyer detailing strain, gender, quantity, price and delivery date.
11. **Pending Facility Manager and Clinical Vet Approval:** A large animal order has been submitted and is awaiting confirmation of housing location by the Facility Manager and confirmation of surgery/euthanasia dates by the Clinical Veterinarian.
12. **Pending Clinical Vet Approval:** A large animal order has been submitted and is awaiting confirmation of surgery/euthanasia dates by the Clinical Veterinarian.
13. **Partially Received:** An order was received and accepted by RARC's Receiving Staff which was not the original ordered quantity.
14. **Returned:** An order was sent back to the vendor by RARC's Receiving Staff due to an incorrect quantity or other issue.
15. **Pending Cage Activation:** An order has only been partially delivered and additional animals are expected to arrive from the vendor at a later date.
16. **Received:** The order has been received and placed in a room/rack designated by Requisitioner or Facility Manager.
17. **Received with Exception:** An order has been received by RARC's Receiving Staff yet the received order is in discrepancy with the original order. This order is with the RARC Buyer for review.
18. **Payable:** Vendor invoice has been received.
19. **Billed:** Principal Investigator (PI) has been billed for the order to the designated Cost Center/Fund Number/Funding Source.
- iv. **PI:** The Principal Investigator to which the animal order is assigned.
- v. **Protocol #:** The IACUC approved protocol number permitting animals to be ordered and decremented from the assigned research protocol.
- vi. **Species:** The species requested for the order.
- vii. **Delivery Date:** The date requested by the Requisitioner for delivery.
- viii. **Quantity:** The number of animals requested.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

- ix. **Vendor:** The commercial business entity who will supply and deliver the animals.
- x. **View:** Select the View hyperlink to view a summary of the Requisition (Figure 6) (red square).

My Commercial Requisitions

Below is a list of animal requisition inquiries related to your protocols. Click on the requisition/purchase request title to display additional information for each specific requisition. Returned requisitions are listed in GREEN.

[Create Commercial Requisition](#)

| Order # | Description | Status | PI | Protocol # | Species | Need by Date | Qty | Vendor | Actions |
|---|-------------|--------------------------------------|--------------|------------|---------|--------------|-----|------------------------|----------------------|
| RA00000169 | | Pending FM Approval | North, Jason | 13-09-010 | Mice | 12/18/2013 | 30 | The Jackson Laboratory | View |
| <div>Animal requisitioner: Marcel, Joselin Quarantine required: No Strain/Stock: C57BL/6J / 000664 Sex: Either Age: 8 - 9 Months Weight: 3 - 5 gm</div> | | | | | | | | | |
| RA00000167 Q00000060 | | Waiting for HR | North, Jason | 13-09-010 | Mice | 12/04/2013 | 15 | The Jackson Laboratory | View |
| RA00000165 | | Pending FM Approval | North, Jason | 13-09-010 | Mice | 10/16/2013 | 20 | The Jackson Laboratory | View |
| RA00000162 | | Pending FM and Clinical Vet Approval | North, Jason | 13-09-010 | Swine | 11/26/2013 | 10 | Archer Farms | View |
| RA00000160 | 10TT | Pending Cage Activation | North, Jason | 13-09-010 | Mice | 10/09/2013 | 15 | The Jackson Laboratory | View |
| RA00000155 | 10TT | Verified | North, Jason | 13-09-010 | Mice | 10/09/2013 | 8 | The Jackson Laboratory | View |

Figure 6

- 1. **Summary of Requisition:** This is a summary of all information regarding the order. This information will be discussed in more detail in the Animal Order Section.
 - a. Requisition Information: Select the [Status History](#) hyperlink (Figure 7) (red circle) to view the history of the order and dates of status changes (Figure 8).

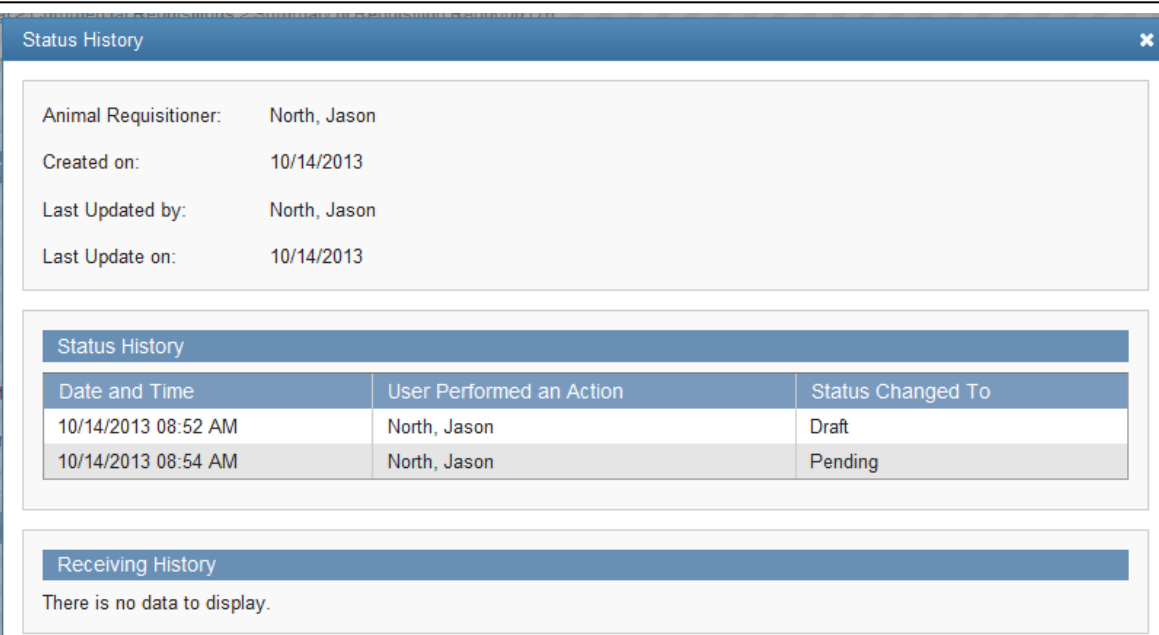
Summary of Requisition RA00000176

[Status History](#)

| Requisition Information | |
|-------------------------|-----------------|
| Description: | Yabba Dabba Doo |
| Requisition #: | RA00000176 |
| PI: | North, Jason |
| Status: | Pending |
| Animal User: | North, Jason |
| Animal Requisitioner: | North, Jason |
| Protocol #: | 13-09-010 |
| Created on: | 10/14/2013 |
| Charged Center-Fund: | 50520-73270 |
| Maint. Center-Fund: | 50520-73270 |

Figure 7

Placing Animal Orders Using the *EnCCoMPass Animal Module*



The screenshot shows a 'Status History' window with a blue header bar and a close button. It contains three sections: a summary of the requisitioner and creation date, a table of status changes, and a receiving history section.

Status History

Animal Requisitioner: North, Jason
Created on: 10/14/2013
Last Updated by: North, Jason
Last Update on: 10/14/2013

| Date and Time | User Performed an Action | Status Changed To |
|---------------------|--------------------------|-------------------|
| 10/14/2013 08:52 AM | North, Jason | Draft |
| 10/14/2013 08:54 AM | North, Jason | Pending |

Receiving History
There is no data to display.

Figure 8

b. Vendor (Figure 9)



The screenshot shows a 'Vendor' window with a blue header bar. It displays the following information:

Vendor

Vendor: JACKSON LABORATORY
Phone: 800-422 -6423
Alternative Vendor OK? No
Vendor Performed Surgical Procedures? No

Figure 9

c. Species Characteristics (Figure 10)



The screenshot shows a 'Species Characteristics' window with a blue header bar. It displays the following information:

Species Characteristics

Species: Mice
Strain/Stock: C57BL/6J/000664
Quantity: 4
I Will Accept Extra Animals: Yes
Sex: Male
Genotype: Homozygous
Age: 4-8 Weeks

Figure 10

Placing Animal Orders Using the *EnCCoMPass Animal Module*

d. Additional Order Lines (Figure 11)

| Additional Order Lines | | | | | |
|---------------------------------------|------------------|----------|-----|--------------------------|------------|
| Line # | Description | Quantity | UOM | Cost | Total Cost |
| Vendor Charges | | | | | |
| There are no charges in this section. | | | | | |
| Animal Program Charges | | | | | |
| 1 | Order processing | 1 | EA | \$0.00 | \$0.00 |
| 2 | Receiving | 1 | EA | \$0.00 | \$0.00 |
| | | | | Vendor Subtotal: | \$0.00 |
| | | | | Animal Program Subtotal: | \$0.00 |
| | | | | Animal Total: | |
| | | | | Total Cost: | \$0.00 |

Figure 11

e. Delivery Information (Figure 12)

| Delivery Information | |
|------------------------------|--|
| Needed by Date: | 10/16/2013 |
| Delivery Address: | Zuckerman Research Center Loading Dock Animal Rec-C-4 408 E. 69th Street New York, NY 10065 |
| Partial Delivery Acceptable? | Yes |

Figure 12

f. Housing Information (Figure 13)

| Housing Information | |
|---------------------------|---------|
| Housing Room/Designation: | ZRC-955 |
| RARC Assigned: | No |

Figure 13

g. Quarantine Information (Figure 14)

| Quarantine Information | |
|--------------------------------|----|
| Rodent Quarantine Is Required? | No |

Figure 14

h. Standing Order Details (Figure 15)

| Standing Order Details | |
|------------------------|----|
| Is Standing Order? | No |

Figure 15

Placing Animal Orders Using the *EnCCoMPass Animal Module*

2. **Send Cancellation Request** (Figure 16) (blue square). Select the [Send Cancellation Request](#) button to cancel the order.
3. **Replicate Order** (Figure 16) (red square). Select the [Replicate Order](#) button to replicate the order. You will be brought to the beginning of the [Commercial Requisition \(Small and Large Animal\)](#) process and modify any fields as necessary.

The screenshot displays a web interface for animal requisitions, organized into four main sections, each with a blue header bar:

- Delivery Information:**
 - Needed by Date: 10/16/2013
 - Delivery Address: Zuckerman Research Center, Loading Dock Animal Rec-C-4, 408 E. 69th Street, New York, NY 10065
 - Partial Delivery Acceptable?: Yes
- Housing Information:**
 - Housing Room/Designation: ZRC-955
 - RARC Assigned: No
- Quarantine Information:**
 - Rodent Quarantine Is Required?: No
- Standing Order Details:**
 - Is Standing Order?: No

At the bottom of the form are two buttons: "Send Cancellation Request" (highlighted with a blue square) and "Replicate Order" (highlighted with a red square).

Figure 16

- c. **My Non-Commercial Requisitions:** Create a new [Non-Commercial](#) requisition, view a summary of the requisition or search existing [Non-Commercial](#) requisitions (Figure 17)
 - i. A **Non-Commercial** requisition is an order in which the Requisitioner will not be charged for the animals ordered, although you may be responsible for shipping costs. Typically, these orders are for mice and rats acquired from a non-commercial source such as a collaborating colleague.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

My Non-Commercial Requisitions

Below is a list of acquisitions of animals from atypical sources related to your protocols. Click on the quarantine number to display additional information for each specific acquisition.

[Create Non-Commercial Requisition](#)

| Quarantine # | Status | PI | Protocol # | Animal Requisitioner | Source Institution | Species | Strain | Quantity |
|---|----------------------------------|--------------|------------|----------------------|------------------------|---------|---------------------|----------|
| Q00000067 RA00000175 | Waiting for HR | North, Jason | 13-09-010 | North, Jason | qwe | Mice | qwe | 2 |
| Q00000066 RA00000174 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Luna Labs | Rats | Y Tu Mama Tambien | 40 |
| Q00000065 RA00000173 | Pending Biosecurity Vet Approval | North, Jason | 13-09-010 | Marcel, Joselin | Watson Labs | Rats | The Double Helix | 1 |
| Q00000064 RA00000172 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Jane Jacobs Labs | Mice | The Economy of Cite | 10 |
| Q00000063 RA00000171 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Nouvelle Vague Labs | Rats | A bout de Souffle | 25 |
| Q00000062 RA00000170 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | JEM Labs | Mice | Animal House | 80 |
| Q00000061 RA00000168 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Borgin & Burkes | Mice | Various | 2 |
| Q00000059 RA00000166 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Rockefeller University | Mice | C57bl6 | 9 |
| Q00000058 RA00000164 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Harvard University | Mice | Wnt5a | 7 |
| Q00000057 RA00000163 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Godrick's Hollow | Mice | Various | 22 |

[Search](#)

Figure 17

i. Animal module dashboard column heading descriptions:

- i. **Quarantine #:** This is a unique identifier in the format of Q12345678.
 1. Selecting the **Quarantine #** hyperlink (Figure 18) (red circle) will provide a summary of the Non-Commerical Requisition. Below the **Quarantine #** is the **Order #**.
- ii. **Status:** Description of the status of the order
 1. **Draft:** An order which has been partially completed and has not been submitted yet.
 2. **Cancelled:** An order which has been cancelled by the RARC Buyer based on a request by the Requisitioner.
 3. **Pending Cancellation:** An order which has been requested to be canceled by the Requisitioner.
 4. **Disapproved:** An order which has been disapproved by the Facility Manager, the Clinical Veterinarian or the Biosecurity Veterinarian.
 5. **Pending:** An order has been submitting and is awaiting review, verification and submission to vender from RARC Buyer.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

6. **Pending Facility Manager Approval:** An order has been submitted and is awaiting housing room assignment or confirmation by the Facility Manager.
 7. **Waiting for Health Report:** An order that requires quarantine and the health report has not been uploaded or sent to the Biosecurity Veterinarian yet.
 8. **Verified:** An order has completed review by the RARC Buyer and is waiting to be sent to the vendor.
 9. **Submitted to Vendor:** An order has been submitted to the vendor.
 10. **Order Confirmed:** The vendor has sent an order confirmation to RARC Buyer detailing strain, gender, quantity, price and delivery date.
 11. **Pending Facility Manager and Clinical Vet Approval:** A large animal order has been submitted and is awaiting confirmation of housing location by the Facility Manager and confirmation of surgery/euthanasia dates by the Clinical Veterinarian.
 12. **Pending Clinical Vet Approval:** A large animal order has been submitted and is awaiting confirmation of surgery/euthanasia dates by the Clinical Veterinarian.
 13. **Partially Received:** An order was received and accepted by RARC's Receiving Staff which was not the original ordered quantity.
 14. **Returned:** An order was sent back to the vendor by RARC's Receiving Staff due to an incorrect quantity or other issue.
 15. **Pending Cage Activation:** An order has only been partially delivered and additional animals are expected to arrive from the vendor at a later date.
 16. **Received:** The order has been received and placed in a room/rack designated by Requisitioner or Facility Manager.
 17. **Received with Exception:** An order has been received by RARC's Receiving Staff yet the received order is in discrepancy with the original order. This order is with the RARC Buyer for review.
 18. **Payable:** Vendor invoice has been received.
 19. **Billed:** Principal Investigator (PI) has been billed for the order to the designated Cost Center/Fund Number/Funding Source.
- iii. **PI:** The Principal Investigator to which the animal order is assigned.
 - iv. **Protocol #:** The IACUC approved protocol number permitting animals to be ordered and decremented from the assigned research protocol.
 - v. **Animal Requisitioner:** The user on the protocol who requested the Non-Commercial Order.
 - vi. **Source Institution:** Location of where the order is originating from.
 - vii. **Species:** The species requested for the order.
 - viii. **Strain:** The requested strain of the species.
 - ix. **Quantity:** The number of animals requested.

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My Non-Commercial Requisitions

Below is a list of acquisitions of animals from atypical sources related to your protocols.
Click on the quarantine number to display additional information for each specific acquisition.

[Create Non-Commercial Requisition](#)

| Quarantine # | Status | PI | Protocol # | Animal Requisitioner | Source Institution | Species | Strain | Quantity |
|---|----------------------------------|--------------|------------|----------------------|---------------------|---------|----------------------|----------|
| Q00000067 RA00000175 | Waiting for HR | North, Jason | 13-09-010 | North, Jason | qwe | Mice | qwe | 2 |
| Q00000066 RA00000174 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Luna Labs | Rats | Y Tu Mama Tambien | 40 |
| Q00000065 RA00000173 | Pending Biosecurity Vet Approval | North, Jason | 13-09-010 | Marcel, Joselin | Watson Labs | Rats | The Double Helix | 1 |
| Q00000064 RA00000172 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Jane Jacobs Labs | Mice | The Economy of Citie | 10 |
| Q00000063 RA00000171 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Nouvelle Vague Labs | Rats | A bout de Souffle | 25 |

Figure 18

d. **Reports:** Various reports can be generated as shown in (Figure 19) as described below.

Reports

[Purchasing Report](#)

[Additional Items Breakdown Report](#)

[Investigator Usage Report](#)

Figure 19

i. **Purchasing Report (Figure 20)**

Search **Commercial** requisitions to view monetary totals and a summary for each requisition based upon selected criteria detailed below.

1. **PI:** Type in the last name of the principal investigator, a list of name(s) will propagate; select the name of interest for your search.
2. **Date Range for:** Select either:
 - a. **Submission date:** Select date order was submitted.
 - or*
 - b. **Delivery date:** Select date order was delivered to facility.
3. **From:** Enter the beginning of specified date range.
4. **To:** Enter the ending of the specified date range.
5. **Advanced Search Criteria:** Select the blue arrowhead next to the heading to display additional search criteria.
 - a. **Protocol #:** Select the IACUC approved protocol number permitting animals to be ordered and decremented from the assigned research protocol.
 - b. **Requisition #:** Select the Requisition # of the order of interest.
 - c. **Funding Source:** Select the cost center/fund number/funding source the order was charged to.
 - d. **Vendor:** Select the vendor the order was placed with.
 - e. **Species:** Select the species requested for the order.
 - f. **Strain:** Select the requested strain of the species.

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- g. **Sex:** Select the gender of interest.
- h. **Genotype:** Select the genotype of interest.
6. Select [Search](#) to view the available orders based upon your criteria. Select [Reset](#) to clear all the search criteria values. Select [Export to Excel](#) to save and view your criteria and results in Excel. (Figure 20) (red square) An example of the exported Excel file is shown in (Figure 21).
7. **Search report column heading descriptions:**
 - a. **Order #:** This is a unique identifier in the format of RA12345678. Selecting the sideways arrow or the [Order #](#) hyperlink (Figure 20) (blue square) will provide more detail regarding the order.
 - b. **Status:** Description of the status of the order
 - c. **PI:** The Principal Investigator to which the animal order is assigned.
 - d. **Date:** The date the order was received.
 - e. **Funding Source:** The funding source assigned to the order.
 - f. **Vendor:** The commercial business entity who will supply and deliver the animals.
 - g. **Billed Quantity:** Quantity of animals charged.
 - h. **Received Quantity:** Quantity of animal received.
 - i. **Animal Sub-Total:** Monetary value of animal(s) ordered.
 - j. **Other Sub-Total:** Monetary value of additional charges (non-animal).
 - k. **Order Total:** Monetary value of total order.
 - l. **View:** Select the View hyperlink to view a summary of the Requisition (Figure 20) (blue circle)

Purchasing Report

PI:

Date Range for: ☒ Submission Date ☐ Delivery Date

From:

To:

☒ **Advanced Search Criteria**

Protocol:

Requisition #:

Funding Source #:

Vendor:

Species:

Strain:

Sex: ☒ Male ☒ Female ☒ Either

Genotype:

[Search](#) [Reset](#) [Export to Excel](#)

| Order # | Status | PI | Date | Funding Source | Vendor | Billed Qty | Received Qty | Animal SubTotal | Other SubTotal | Order Total | Actions |
|------------------------------|---------|--------------|------|----------------|------------------------|------------|--------------|-----------------|----------------|-------------|----------------------|
| ▶ RA00000176 | Pending | North, Jason | | 50520-73270 | The Jackson Laboratory | | | | \$0.00 | | View |

Figure 20

Placing Animal Orders Using the *EnCCoMPass Animal Module*

Animal Purchasing Report

Generated on: 10/16/2013

PI: North, Jason Submission Date: 10/04/2013 From: 10/04/2013 To: 10/16/2013 Strain: Sex: Male, Female, Either

Protocol: Any Delivery Date: Funding Source: Genotype: Requisition #: Vendor: Requestion #:

| PI | Date | Order # | Status | Funding Source | Protocol | Vendor | Species | Strain | Sex | Age Range | Weight Range | Billed Qty | Received Qty | Animal SubTotal | Other SubTotal | Order Total |
|--------------|------------|------------|-----------------------------------|------------------------|-------------------|-----------|---------|--------------|-----|-----------|--------------|------------|--------------|-----------------|----------------|-------------|
| North, Jason | | RA00000129 | Pending PM Approval | 111-22-333-4-13-09-010 | The Jackson Mice | C57BL/6J | Male | 5-6 Weeks | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000130 | Pending Biossecurity Vet Approval | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Female | 10-15 Weeks | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000131 | Pending PM Approval | 111-22-333-4-13-09-010 | The Jackson Mice | C57BL/6J | Male | 5-10 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000132 | Pending | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | 2-4 Weeks | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000133 | Pending | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | to 10 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000134 | Pending | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | to 10 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000135 | Pending | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | to 10 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000136 | Pending | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | to 10 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000137 | Waiting for HR | 111-22-333-4-13-09-010 | The Jackson Mice | C57BL/6J | Female | 2-3 Days | | 1-2 gm | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000138 | Pending PM Approval | 50520-73270 13-09-010 | The Jackson Mice | BALB/cByJ | Either | to 3 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000139 | Pending PM Approval | 50520-73270 13-09-010 | The Jackson Mice | BALB/cByJ | Either | to 3 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000140 | Pending PM Approval | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | 2-3 Weeks | | 2-6 gm | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000141 | Pending PM Approval | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | 2-3 Weeks | | 2-6 gm | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000142 | Pending Approval | 50520-73270 13-09-010 | Archer Farm Swine | Yorkshire | Either | 3-4 Months | | 2-3 kg | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000143 | Pending | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Female | 4-6 Weeks | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000144 | Pending | 111-22-333-4-13-09-010 | The Jackson Mice | BALB/cByJ | Female | 5-6 Weeks | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000145 | Waiting for HR | 50520-73270 13-09-010 | The Jackson Mice | BALB/cByJ | Either | to 3 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000146 | Pending PM Approval | 50520-73270 13-09-010 | The Jackson Mice | BALB/cByJ | Male | 10-12 Weeks | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000147 | Pending | 111-22-333-4-13-09-010 | The Jackson Mice | BALB/cByJ | Female | 3-5 Months | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000148 | Pending Approval | 50520-73270 13-09-010 | Archer Farm Swine | Yorkshire | Male | 6-8 Months | | 4-5 kg | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000150 | Waiting for HR | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Either | 2-3 Weeks | | 5-5 gm | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000152 | Pending PM Approval | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Female | 6-8 Weeks | | | | | | \$0.00 | | \$0.00 |
| North, Jason | | RA00000153 | Pending | 111-22-333-4-13-09-010 | The Jackson Mice | BALB/cByJ | Female | 6-8 Days | | | | | | \$0.00 | | \$0.00 |
| North, Jason | 10/04/2013 | RA00000155 | Order Confirmed | 50520-73270 13-09-010 | The Jackson Mice | C57BL/6J | Male | from 12 Week | | | | | | \$80.00 | | \$80.00 |
| North, Jason | | RA00000160 | Pending Cage Activation | 111-22-333-4-13-09-010 | The Jackson Mice | C57BL/6J | Male | 2-4 Weeks | | | | 15 | 15 | \$45.00 | \$0.00 | \$45.00 |
| North, Jason | | RA00000162 | Pending Approval | 111-22-333-4-13-09-010 | Archer Farm Swine | Yorkshire | Male | 5-6 Months | | 2-3 kg | | | | \$0.00 | | \$0.00 |

Figure 21

ii. Additional Items Breakdown Report (Figure 22)

Search Requisitions to view monetary totals for each requisition in relation to additional items (i.e. Castration, Vasectomy, etc.)

- PI:** Type in the last name of the Principal Investigator, a list of name(s) will propagate; select the name of interest for your search.
- Date Range for:** Select either:
 - Submission date:** Select date order was submitted.
 - Delivery date:** Select date order was delivered to facility.
- From:** Enter the beginning of specified date range.
- To:** Enter the ending of the specified date range.
- Advanced Search Criteria:** Select the blue arrowhead next to the heading to display additional search criteria.
 - Protocol #:** Select the IACUC approved protocol number permitting animals to be ordered and decremented from the assigned research protocol.
 - Requisition #:** Select the Requisition # of the order of interest.
 - Funding Source:** Select the cost center/fund number the order was charged to.
 - Vendor:** Select the vendor the order was placed with.
 - Additional Item Description:** Free text field to enter specific additional item of interest.
 - Species:** Select the species requested for the order.
 - Strain:** Select the requested strain of the species.
 - Sex:** Select the gender of interest.
 - Genotype:** Select the genotype of interest.
- Select **Search** to view the available orders based upon your criteria. Select **Reset** to clear all the search criteria values. Select **Export to**

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Excel to save and view your criteria and results in Excel. (Figure 22) (red square) An example of the exported Excel file is shown in (Figure 23).

a. **Search report column heading descriptions:**

- i. **Order #:** This is a unique identifier in the format of RA12345678. Selecting the sideways arrow or the [Order #](#) hyperlink (Figure 22) (blue square) will provide more detail regarding the order.
- ii. **Status:** Description of the status of the order
- iii. **PI:** The Principal Investigator to which the animal order is assigned.
- iv. **Date:** The date the order was received.
- v. **Funding Source:** The funding source assigned to the order.
- vi. **Vendor:** The commercial business entity who will supply and deliver the animals.
- vii. **Billed Quantity:** Quantity of animals charged.
- viii. **Received Quantity:** Quantity of animal received.
- ix. **Additional Item Description:** Description of Additional Item such as Order processing, Receiving, or a specific surgical procedure.
- x. **Other Sub-Total:** Monetary value of additional charges (non-animal).
- xi. **Order Total:** Monetary value of total order.
- xii. **View:** Select the View hyperlink to view a summary of the Requisition (Figure 22) (blue circle)

Additional Items Breakdown Report

PI:

Date Range for: ☒ Submission Date ☐ Delivery Date

From:

To:

☒ Advanced Search Criteria

Protocol:

Requisition #:

Funding Source #:

Vendor:

Additional Item Description:

Species:

Strain:

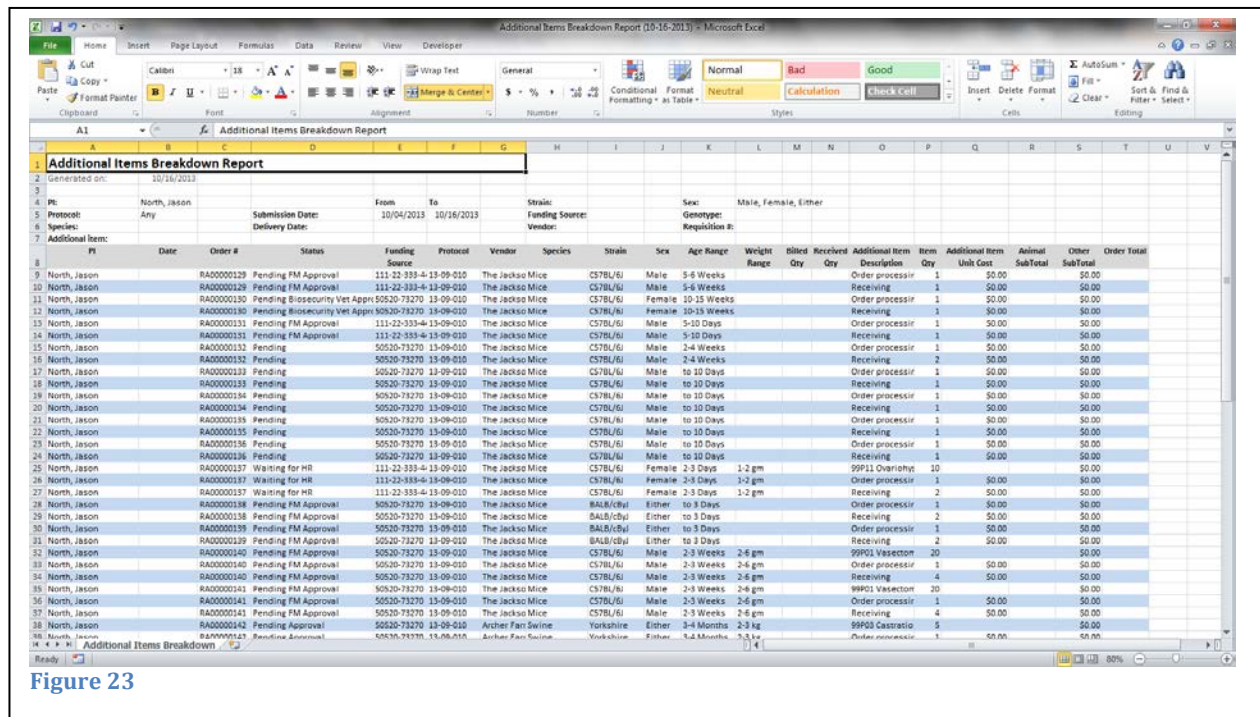
Sex: ☒ Male ☒ Female ☒ Either

Genotype:

| Order # | Status | PI | Date | Funding Source | Vendor | Billed Qty | Received Qty | Additional Item Description | Item Qty | Additional Item Price | Actions |
|--------------|---------------------|--------------|------|----------------|------------------------|------------|--------------|-----------------------------|----------|-----------------------|-------------------------------------|
| ▶ RA00000129 | Pending FM Approval | North, Jason | | 111-22-333-44 | The Jackson Laboratory | | | Order processing | 1 | \$0.00 | <input type="button" value="View"/> |

Figure 22

Placing Animal Orders Using the *EnCCoMPass Animal Module*



iii. Balances

Search Protocol to determine animal balance based upon species, USDA classification, total approved numbers, animal used, and balance

1. **PI:** Type in the last name of the Principal Investigator, a list of name(s) will propagate; select the name of interest for your search.
2. **Protocol #:** Select the IACUC approved protocol number permitting animals to be ordered and decremented from the assigned research protocol.
3. **Include Terminated Protocols:** Check this box if you want to view terminated protocols.
4. Select [Search](#) to view the available orders based upon your criteria. (Figure 24) (red square)
5. **Search report column heading descriptions:**
 - a. **PI:** The Principal Investigator to which the animal order is assigned.
 - b. **Protocol #:** The IACUC approved protocol number permitting animals to be ordered and decremented from the assigned research protocol.
 - c. **Species:** The species of the animal.
 - d. **C:** Quantity of animals approved by the IACUC for USDA Class C use in the protocol.
 - e. **D:** Quantity of animals approved by the IACUC for USDA Class D use in the protocol.
 - f. **E:** Quantity of animals approved by the IACUC for USDA Class E use in the protocol.
 - g. **Total Approved Numbers:** The quantity of animals approved by the IACUC for the protocol based upon species.

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- h. **Used:** The quantity of animal used/decremented from the approved quantity.
- i. **Balance:** The quantity of animals available for use on the protocol.

Balances

PI:

Protocol:

☐ Include Terminated Protocols

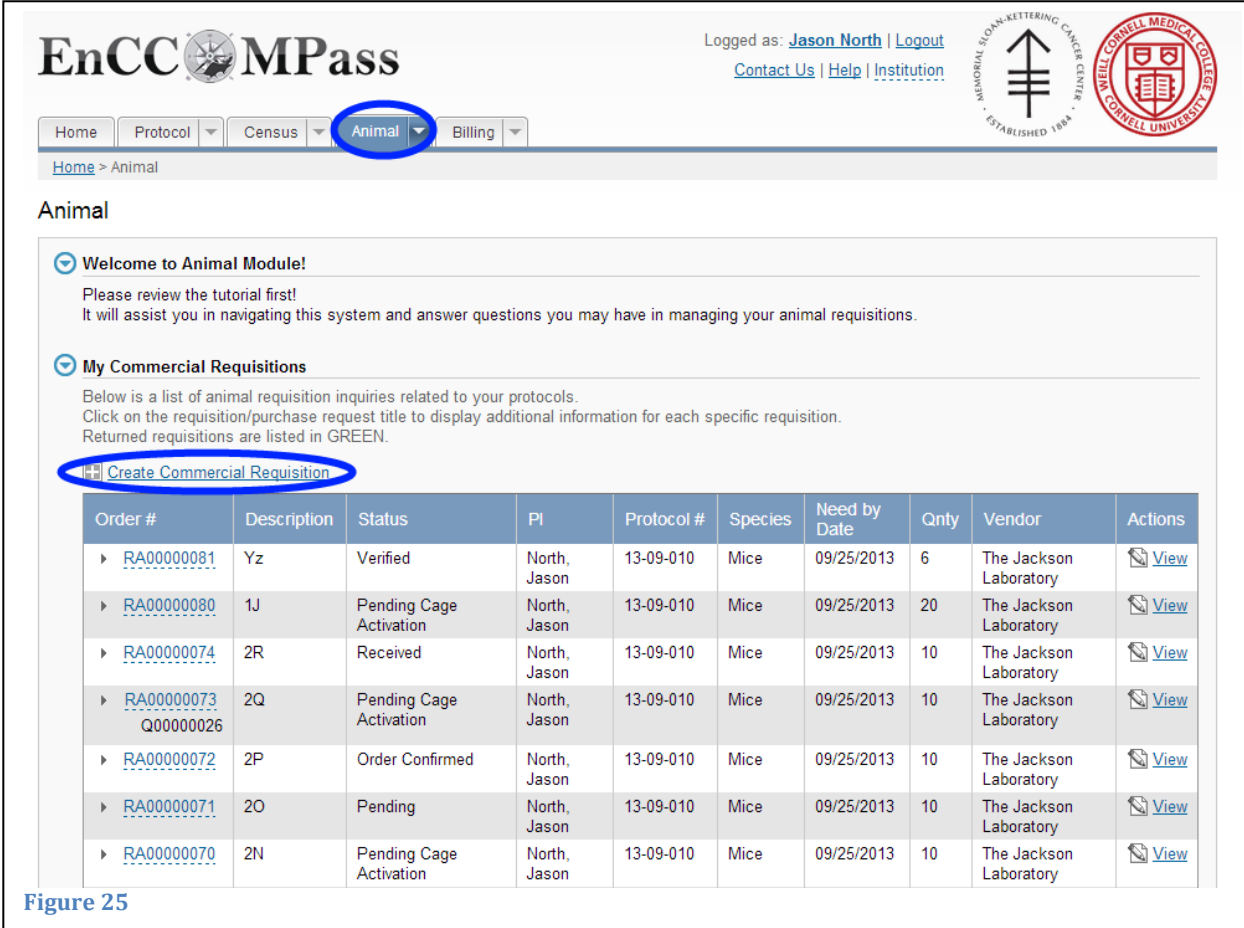
| PI | Protocol | Species | C | D | E | Total Approved Numbers | Used | Balance |
|--------------|-----------|-------------------------|-------|---|---|------------------------|------|---------|
| North, Jason | 13-09-010 | Mice | 10000 | 0 | 0 | 10000 | 3915 | 6085 |
| North, Jason | 13-09-010 | Rabbits | 0 | 0 | 0 | 10000 | 0 | 10000 |
| North, Jason | 13-09-010 | Rats | 10000 | 0 | 0 | 10000 | 95 | 9905 |
| North, Jason | 13-09-010 | Swine | 10000 | 0 | 0 | 10000 | 52 | 9948 |

Figure 24

Placing Animal Orders Using the *EnCCoMPass Animal Module*

Commercial Requisition (Small and Large Animal)

1. After logging onto *EnCCoMPass*, select the **Animal** tab on the upper left section of the page to view the Animal Module home page with available options (**Figure 25**).
2. Select **Create Commercial Requisition**
Please refer to Animal Module, 2., b. for a detailed description on how to use and navigate the Commercial Requisition dashboard.



EnCCoMPass

Logged as: [Jason North](#) | [Logout](#)
[Contact Us](#) | [Help](#) | [Institution](#)

Home | Protocol | Census | **Animal** | Billing

[Home](#) > Animal

Animal

Welcome to Animal Module!
Please review the tutorial first!
It will assist you in navigating this system and answer questions you may have in managing your animal requisitions.

My Commercial Requisitions
Below is a list of animal requisition inquiries related to your protocols.
Click on the requisition/purchase request title to display additional information for each specific requisition.
Returned requisitions are listed in GREEN.

Create Commercial Requisition

| Order # | Description | Status | PI | Protocol # | Species | Need by Date | Qty | Vendor | Actions |
|---|-------------|-------------------------|--------------|------------|---------|--------------|-----|------------------------|----------------------|
| ▶ RA00000081 | Yz | Verified | North, Jason | 13-09-010 | Mice | 09/25/2013 | 6 | The Jackson Laboratory | View |
| ▶ RA00000080 | 1J | Pending Cage Activation | North, Jason | 13-09-010 | Mice | 09/25/2013 | 20 | The Jackson Laboratory | View |
| ▶ RA00000074 | 2R | Received | North, Jason | 13-09-010 | Mice | 09/25/2013 | 10 | The Jackson Laboratory | View |
| ▶ RA00000073 Q00000026 | 2Q | Pending Cage Activation | North, Jason | 13-09-010 | Mice | 09/25/2013 | 10 | The Jackson Laboratory | View |
| ▶ RA00000072 | 2P | Order Confirmed | North, Jason | 13-09-010 | Mice | 09/25/2013 | 10 | The Jackson Laboratory | View |
| ▶ RA00000071 | 2O | Pending | North, Jason | 13-09-010 | Mice | 09/25/2013 | 10 | The Jackson Laboratory | View |
| ▶ RA00000070 | 2N | Pending Cage Activation | North, Jason | 13-09-010 | Mice | 09/25/2013 | 10 | The Jackson Laboratory | View |

Figure 25

Placing Animal Orders Using the *EnCCoMPass Animal Module*

3. **Create a Requisition (Step1/3)** (Figure 26)

Please Note:

- Information icons appear throughout *EnCCoMPass Animal* next to request field headings. Whenever you see one of these blue icons, place your cursor over it to obtain more information about the field (Figure 26) (red arrow).
- Request field headings which have a red asterisk (*) next to them are required fields.

a. **General Information**

- PI:** Type in the last name of the Principal Investigator, a list of name(s) will propagate; select the name of interest for your search.
Note: More than one PI may appear in this dropdown menu. This will depend on the number of PI's who have granted you access to order animals on their protocols. If the PI you are ordering for does not appear, you will need that PI to amend his or her protocol and assign you animal requisitioning rights. (Refer to [How to make personnel changes in EnCCoMPass](#); please use the appropriate institutional hyperlink [MSKCC](#) or [WCMC](#) for detailed instructions)
- Description:** Please enter text to assist in describing the order. This is not a required field.
- Protocol:** Select the protocol on which the animals are being ordered. Please ensure if more than one protocol appears you select the proper protocol to avoid potential future non-compliance issues. If the protocol you need does not appear, you need to be added as an Animal Requisitioner on that protocol. (Refer to [How to make personnel changes in EnCCoMPass](#); please use the appropriate institutional hyperlink [MSKCC](#) or [WCMC](#) for detailed instructions)
- Animal User:** Select the person who will be responsible for the animals once they arrive at the institution. This person's name will be printed on the cage card, and will be contacted if there are any issues involving the animals after they arrive until they are sacrificed or transferred to another user.
- Species:** You will only be able to select species approved on the protocol, if you don't see the species you need, you may not be ordering on the correct protocol or the protocol needs to be amended to include the species.

b. **Billing Information**

Note:

- You can select the same or different funding sources for each of these charges.
 - If your funding source is not listed, as indicated in the note, use the hyperlink to contact the CCMP Billing Team.
- Charged Funding Source:** Select the funding source for the purchase of the animals.
 - Maintenance Funding Source:** Select the funding source for the daily maintenance or per diem of the animals.
 - Vendor:** Select the appropriate vendor.
Note : As described in the information icon, both approved and non-approved commercial vendors will appear in the drop-down menu. If your vendor does not appear, you will need to submit a non-commercial requisition.
 - Alternate Vendor OK?:** Selecting the check box indicates it is acceptable for RARC to use an alternate vendor if the requested animals are not available from your preferred vendor.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

1. **Select Alternate Vendor:** Select [Any](#) to chose all other avaialble vendor(s) or use cntrl-click to multi-select specific vendors.
 - v. **Vendor Perform Surgical Procedures?:** Selecting the surgical procedure check box will expand this section providing the opportunity to provide details about the surgical procedure(s).
 1. **Select Procedure:** Select desired procedures in the left procedure box. You can cntrl-click to multi-select specific procedures.
 2. Once the desired procedures are selected, select the right arrow between the two selection boxes, to move the items to the right procedure box.
 3. All items in the right procedure box will be added to the order as [Additional lines](#) and charged accordingly.
 - vi. **Other Procedure:** Please enter text to assist in describing a procedure not listed.
- c. **Select Save and Continue** ([Figure 28](#)) (red square)
- Note :
- Selecting [Exit](#) will cancel the requisition and send you back to the Animal module dashboard.
 - If you do not enter required information. The system will not let you proceed until all of the fields with a small red asterisk are completed. If you miss a required field, the system will highlight the field in red. Depending on your screen size, IF YOU HAVE SELECTED SAVE AND CONTINUE AND IT APPEARS NOTHING HAS HAPPENED you may have to review all the fields TO FIND THE FIELD THAT IS MISSING INFORMATION.

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Create a Requisition: Step 1/3

General Information

PI:*
North, Jason

Description: ⓘ
Test

Protocol:*
13-09-010, Nanoparticles and Higg

Animal User:* ⓘ
North, Jason

Species:*
Mice

Billing Information

Charged Funding
Source:*
111-222

Maintenance Funding
Source:*
111-222

If your funding source is not listed in the drop-down, please contact the [CCMP's billing team](#).

Vendor

Vendor:* ⓘ
JACKSON LABORATORY

☒ Alternative Vendor OK?

Alternative Vendor:
Any

☒ Vendor Perform Surgical Procedures?

Select Procedure:
99P02 Ovariectomy
99P03 Castration
99P05 Jug Vein Cannulat – mice
99P06 Jug Vein Cannulat Bilat – rat
99P10 Thymectomy
99P11 Ovariohysterectomy

99P01 Vasectomy
99P04 Jug Vein Cannulat - rats

Press CTRL to select multiple items to move over.

Other Procedure:
Procedure

Previous

Exit

Save and Continue

Figure 26

Placing Animal Orders Using the *EnCCoMPass Animal Module*

4. **Create a Requisition (Step 2/3)**

- a. **Species Characteristics:** (Figure 27) In this step, you define the species and characteristics of the animals you require in the first section.
 - i. **Vendor Strain or Custom Strain:** By default **Vendor Strain/Stock** will be selected. If this is a custom Strain, select **Custom Strain/Stock**
 - ii. **Strain/Stock:**
 1. If **Vendor Strain**-The most commonly ordered strains from the vendor you have previously selected will be accessible in the dropdown.
 2. If **Custom Strain**- Enter desired strain and stock # manually.
 - iii. **Quantity:** Please select the desired quantity of animal to order.

Note:

 - Your available balance will be shown. This is the number of animals remaining on the protocol. If you require more animals than you are allowed to order you need to submit an amendment to the protocol.
 - iv. **Accept Extra Animals:** Select **Yes** or **No**.

Note:

 - As stated in the information box, some vendors send extra animals free of charge. If you select YES, these extras will be housed in your room for your use, but remember, they will be debited from your protocol and you will pay per diem for these animals. Also ensure your remaining balance is large enough to cover these extra animals.
 - v. **Sex:** Enter the desired gender of animals from the drop-down box.
 - vi. **Genotype:** Enter the desired genotype gender of animals from the drop-down box.
 - vii. **Age and/or Weight:** Select either an age or weight range for the animals. Also select the appropriate age or weight unit from the provided drop-down box.

Note:

 - Providing one of these parameters is mandatory to proceed with the ordering process. IF YOU NEED ANIMALS OF A SPECIFIC WEIGHT OR AGE ENTER THE SAME NUMBER IN BOTH THE TO AND FROM FIELD.
 - viii. **Item Description:** Use this free text fields to add any additional information to describe the requirements of the order.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

Create a Requisition: Step 2/3

Species Characteristics

Please Select:

☒ Vendor Strain/Stock
☐ Custom Strain/Stock

Strain/Stock:

C57BL/6J/000664

Quantity:

4

Available Balance: 5817

I Will Accept Extra Animals:

☐ Yes ☒ No

Sex:

Male

Genotype:

Homozygous

Please Select:

☒ Age ☐ Weight

From:

4

To:

4

Days

Item Description:

Use to specify Pregnancy, Genotype, Project number etc.

a. Delivery Information (Figure 28)

- Needed by Date:** Select the date you would like your animals delivered.

Note:

- Only dates in which the vendor makes deliveries will be available/shown. If a date does not appear, you may have missed the deadline for order submission for that week.

- Partial Delivery Acceptable:** Indicate if partial delivery is acceptable. Partial delivery means you will receive the entire quantity of mice you have requested, but they may not all be delivered on the same date. If this is not acceptable, indicate no and only a complete order will be delivered.
- Vendor Delivery Instructions:** Enter any special delivery instructions for the vendor.

Delivery Information

Needed by Date:

10/02/2013

Partial Delivery Acceptable?

☒ Yes ☐ No

Vendor Delivery Instructions:

None

Caution: The delivery instructions sent to the vendor

b. Housing Information

- Housing Room/Designation or RARC Assigned:**

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1. **Select Housing Room/Designation:** The Housing Room/Designation is selected by default. The dropdown lists all rooms in which the PI currently houses the species being ordered (Figure 29).
Note:
 - It is possible that no rooms will appear. This MIGHT happen if the PI DOES not CURRENTLY house any animals of this species. It is also possible that the specific room in which you want TO house the animals does not appear. As an example, this might happen when you need to use a hazard room, but DO NOT CURRENTLY HAVE ANIMALS IN THE ROOM. In either of these situations select the RARC Assigned option.
2. **Select RARC Assigned:** Once RARC Assigned is selected you will be provided the opportunity to select the facility the animals should be housed in rather than a specific room. It is important that you provide additional information in the area provided so the facility manager can select the appropriate location for your animals. If the order is for large animals, provide information about the project the animals will be used for. IF HAZARDS ARE INVOLVED, INDICATE THE HAZARD (Figure 30).
 - ii. **Additional Information:** Enter any instructions to assist the Facility Manager in assigning an appropriate room.

The screenshot shows a web form titled 'Housing Information'. Under the heading 'Please Select:', there are two radio buttons: 'Housing Room/Designation' (which is selected) and 'RARC Assigned'. Below this, there is a dropdown menu labeled 'Housing Room/Designation:*' with 'LIC-135' selected.

Figure 29

The screenshot shows the same 'Housing Information' form. Under 'Please Select:', the 'RARC Assigned' radio button is now selected. The dropdown menu is now labeled 'Facility:*' and has 'ZRC' selected. Below this is a large text area labeled 'Additional Information:' with a blue information icon to its left.

Figure 30

- c. **Receiving Information (Figure 31)**
 - i. **Animal Receiving Instructions:** Enter any special housing instructions for the RARC receiving personnel.
- b. **Select Save and Continue (Figure 31) (red square)**
Note :
 - Selecting Previous will take you back to Requisition Step (1/3) and you will lose any data entered in Requisition Step (2/3). If you need to go back, it is recommended to select Save and Continue first so as not to lose any data entered.

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- Selecting **Exit** will cancel the requisition and send you back to the Animal module dashboard.
- If you do not enter required information. The system will not let you proceed until all of the fields with a small red asterisk are completed. If you miss a required field, the system will highlight the field in red. Depending on your screen size, IF YOU HAVE SELECTED SAVE AND CONTINUE AND IT APPEARS NOTHING HAS HAPPENED you may have to review all the fields TO FIND THE FIELD THAT IS MISSING INFORMATION.



Figure 27

5. Create a Requisition (Step 3/3)

- a. **Quarantine Information:** If you are not sure if quarantine is required leave the box unchecked. RARC will verify if quarantine is required and if necessary check the box and return the requisition to you (Figure 32).

Note:

- If you are ordering mice or rats, when you arrive at (Step 3/3), you will see three sections as shown here.
- If you are ordering animals other than rats or mice, you will only see the Buyer Instructions section.
- If you will not have a need to order mice and rats, you can skip to the instructions for the Buyer Instructions section by selecting the button below.

- b. **Rodent Quarantine is Required?:** Select this check box if you know that the animals you ordered must be quarantined. Checking this expedites your order being processed.
 - i. **Strain/Stock Described in IACUC?:** Select **Yes** if it is described in your protocol. In not:

In order to use this strain/stock you must add it to your protocol via the amendment process. You may order these animals and they can be received and placed into quarantine but they will not be released until the amendment is approved.

- ii. **Animal are:** Select whether your animals are immunocompetent or immunodeficient.
- iii. **Will Animals Be Used Acutely from Quarantine?:** Select **All**, **Some** or **None**. If **All** or **Some** are selected you will need to **Describe the Acute Use**.
- iv. **Describe Acute Use:** Enter narrative of acute use.

Note:

- Acute use does not include breeding. Breeding is always allowed. Instead indicate if animals will need to be euthanized as part of the experimental use, before they leave the quarantine.

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- v. **Please Describe Mutation or Phenotype. Include any Clinical Abnormalities:**
Provide information on any observable phenotype needed.
- vi. **Husbandry requirements:** Provide information on any special husbandry needed such as special feed, special water, etc.

Create a Requisition: Step 3/3

Quarantine Information

☒ Rodent Quarantine Is Required? [Vendors](#)

Strain/Stock Described in IACUC?*

Animals Are:*

Will Animals Be Used Acutely from Quarantine? * [i](#)

Please Describe Acute Use:*

Please Describe Mutation or Phenotype. Include any Clinical Abnormalities:*

Husbandry Requirements: [i](#)

☐ Yes ☐ No

☒ Immunocompetent
☐ Immunodeficient

☒ All
☐ Some
☐ None

Figure 28

- c. **Health Report from Source Institution:** When quarantine is required, the health report from the supplying institution is essential. Ensuring the health report is sent to our BioSecurity Veterinarian promptly will expedite your order. Please select one of the following options ([Figure 33](#))
 - i. Indicate if the report was already sent to the Biosecurity Veterinarian.
 - ii. Alternatively if you have the report, you can upload it directly into the *EnCCoMPass Animal* module.
 - iii. Finally, if you are going to request that the report be sent, select the hyperlink for the most current contact information for the Biosecurity Veterinarian

Health Report

Health Report from Source Institution:

☒ Was sent to biosecurity veterinarian

☐ Uploaded here:

Choose File

No file chosen

Upload

☐ Was requested from source institution and will be sent to the [biosecurity veterinarian](#)

Note: This request cannot be processed without a Health Report from the source institution.


Figure 29

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- d. **Is Standing Order?:** Select the check box to establish a standing order; such that the same strain and number of animals is delivered on a regular schedule (Figure 34).
- Frequency:** Select the desired frequency of order delivery.
 - Interval:** Select a starting and ending date.

Note:

- Animals requiring quarantine cannot be ordered as a standing order.
- Due to the fiscal year constraints, standing orders must have an End Date on/or before June 30 or December 31, whichever is closer.




The screenshot shows a web form titled "Standing Order Details". It contains a checkbox labeled "Is Standing Order?" which is checked. Below this, there is a "Frequency:" section with four radio button options: "Weekly", "Every Two Weeks", "Every Three Weeks", and "Monthly". The "Weekly" option is selected. Below the frequency options, there is an "Interval:" section with two text input fields: "Start Date:*" and "End Date:*". Below these fields, a note states: "Note: Due to the fiscal year constraints, standing orders must have End Date on/or before June 30 or December 31, whichever is closer."

Figure 30

- e. **Buyers Instructions:** Enter any special instructions for the buyer.
- f. Select Save and Continue (Figure 35) (red square)

Note :

- Selecting Previous will take you back to Requisition Step (2/3) and you will lose any data entered in Requisition Step (3/3). If you need to go back, it is recommended to select Save and Continue first so as not to lose any data entered.
- Selecting Exit will cancel the requisition and send you back to the Animal module dashboard.
- If you do not enter required information. The system will not let you proceed until all of the fields with a small red asterisk are completed. If you miss a required field, the system will highlight the field in red. Depending on your screen size, IF YOU HAVE SELECTED SAVE AND CONTINUE AND IT APPEARS NOTHING HAS HAPPENED you may have to review all the fields TO FIND THE FIELD THAT IS MISSING INFORMATION



The screenshot shows a web form titled "Buyer Instructions". It contains a text input field labeled "Buyer Instructions:". Below the input field, there are three buttons: "Previous", "Exit", and "Save and Continue". The "Save and Continue" button is highlighted with a red square.

Figure 31

Placing Animal Orders Using the *EnCCoMPass Animal Module*

6. **Review Commercial Requisition Summary:** Carefully review the summary and confirm that all the information is accurate (Figure 36).
 - a. Select **Submit** button to place order. You will receive an e-mail from *EnCCoMPass* indicating the order has been placed.

Note :

- Selecting **Previous** will take you back to **Requisition Step (3/3)**.
 - Selecting **Exit** will cancel the requisition and send you back to the *Animal Module* dashboard.
 - If you do not enter required information. The system will not let you proceed until all of the fields with a small red asterisk are completed. If you miss a required field, the system will highlight the field in red. Depending on your screen size, IF YOU HAVE SELECTED SAVE AND CONTINUE AND IT APPEARS NOTHING HAS HAPPENED you may have to review all the fields TO FIND THE FIELD THAT IS MISSING INFORMATION
- b. After submission, you will be returned to the *EnCCoMPass Animal* landing page where the requisition will have been added to your dashboard. Each requisition is assigned a unique number by the application.

Note:

- If you start an order but do not have time to complete and submit, as long as you select **Save and Continue** before leaving *EnCCoMPass Animal*, the information you have entered will be saved as a draft order so you can continue from where you left off. Additionally, the status column can be checked to determine the state of your order.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

Create Commercial Requisition: Summary

| Requisition Information | |
|-------------------------|--|
| Description: | Test |
| PI: | North, Jason |
| Protocol #: | 13-09-010 |
| Protocol Title: | Nanoparticles and Hippo Signaling characterization in Mice |
| Animal User: | North, Jason |
| Business phone: | 646-555-3544 |
| Charged Center-Fund: | 111-222 |
| Main Center-Fund: | 111-222 |

| Vendor | |
|---------------------------------------|---|
| Vendor: | JACKSON LABORATORY |
| Phone: | 800-422-6422 |
| Alternative Vendor OK? | Yes |
| Alternative Vendor: | Any |
| Vendor Performed Surgical Procedures? | Yes |
| Procedures: | <ul style="list-style-type: none">• 99P01 Vasectomy• Procedure |

| Species Characteristics | |
|-----------------------------|----------------|
| Species: | Mouse |
| Strain/Stock: | C57BL/6J000654 |
| Quantity: | 4 |
| I Will Accept Some Animals: | Yes |
| Sex: | Male |
| Genotype: | Homozygous |
| Age: | 0-0 Weeks |
| Weight: | 1-2 gm |

| Delivery Information | |
|------------------------------|---|
| Needed by Date: | 10/23/2013 |
| Delivery Address: | Zuckerman Research Center Loading Dock Animal Rm-C-4 405 E. 69th Street New York, NY 10065 |
| Partial Delivery Acceptable? | Yes |

| Housing Information | |
|---------------------|-----|
| RARC Assigned: | Yes |
| Facility: | ZRC |

Previous

Exit

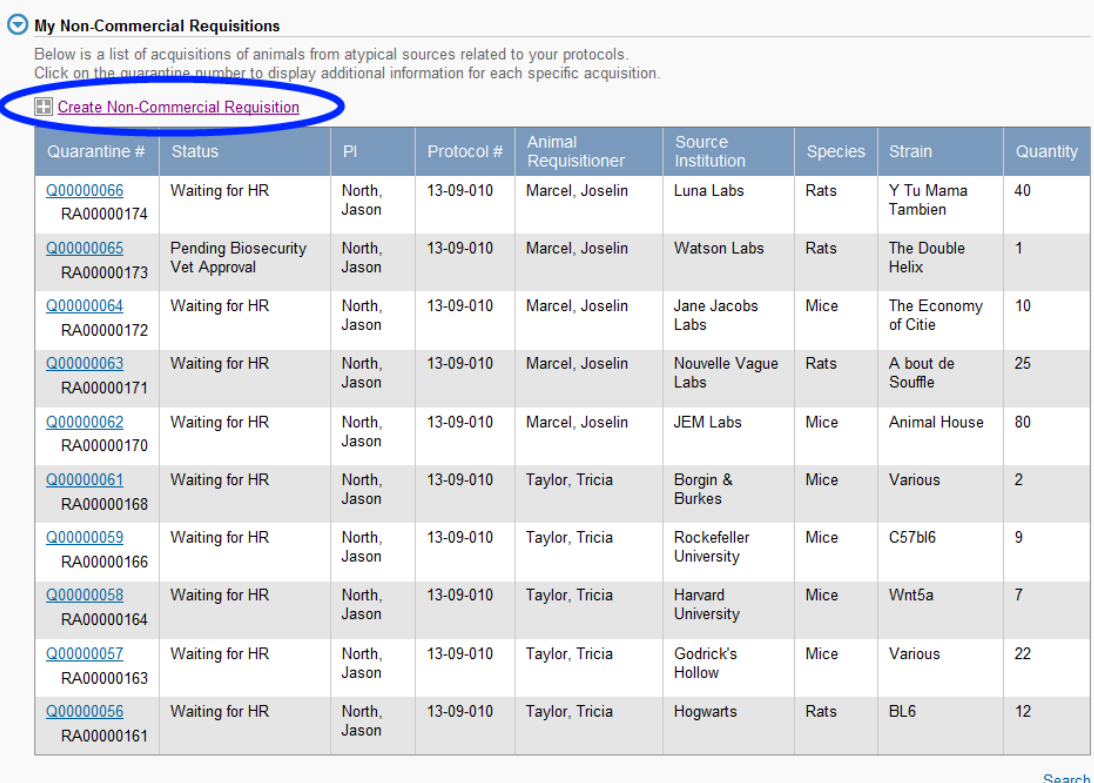
Submit

Figure 32

Placing Animal Orders Using the *EnCCoMPass Animal Module*

Non-Commercial Requisition (Mice & Rats)

1. After logging onto *EnCCoMPass*, select the **Animal** tab on the upper left section of the page to view the Animal Module home page with available options (Figure 37).
2. Select **Create Non-Commercial Requisition**
Please refer to **Animal Module, 2., c.** for a detailed description on how to use and navigate the Non-Commercial Requisition dashboard.



My Non-Commercial Requisitions

Below is a list of acquisitions of animals from atypical sources related to your protocols.
Click on the quarantine number to display additional information for each specific acquisition.

[Create Non-Commercial Requisition](#)

| Quarantine # | Status | PI | Protocol # | Animal Requisitioner | Source Institution | Species | Strain | Quantity |
|---|----------------------------------|--------------|------------|----------------------|------------------------|---------|----------------------|----------|
| Q00000066 RA00000174 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Luna Labs | Rats | Y Tu Mama Tambien | 40 |
| Q00000065 RA00000173 | Pending Biosecurity Vet Approval | North, Jason | 13-09-010 | Marcel, Joselin | Watson Labs | Rats | The Double Helix | 1 |
| Q00000064 RA00000172 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Jane Jacobs Labs | Mice | The Economy of Citie | 10 |
| Q00000063 RA00000171 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | Nouvelle Vague Labs | Rats | A bout de Souffle | 25 |
| Q00000062 RA00000170 | Waiting for HR | North, Jason | 13-09-010 | Marcel, Joselin | JEM Labs | Mice | Animal House | 80 |
| Q00000061 RA00000168 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Borgin & Burkes | Mice | Various | 2 |
| Q00000059 RA00000166 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Rockefeller University | Mice | C57bl6 | 9 |
| Q00000058 RA00000164 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Harvard University | Mice | Wnt5a | 7 |
| Q00000057 RA00000163 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Godrick's Hollow | Mice | Various | 22 |
| Q00000056 RA00000161 | Waiting for HR | North, Jason | 13-09-010 | Taylor, Tricia | Hogwarts | Rats | BL6 | 12 |

[Search](#)

Figure 33

3. Create a Non-Commercial Requisition

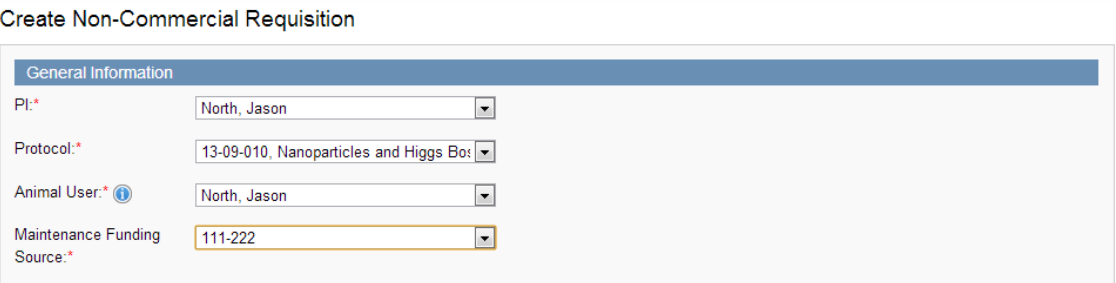
Please Note:

- Information icons appear throughout *EnCCoMPass Animal* next to request field headings. Whenever you see one of these blue icons, place your cursor over it to obtain more information about the field.
- Request field headings which have a red asterisk (*) next to them are required fields.
- Non-commercial requisitions require quarantine, so completing this section, and providing the health report is required. A significant difference is the additional requirement for Source Institution Information. Upon completion of a non-commercial requisition, automatic e-mails will be generated by *EnCCoMPass* when you select submit, so please be careful entering this information. Please also note the section Housing Information AFTER Quarantine. It is important that you select the location where you want the animals housed AFTER they are released from quarantine. Finally, although there is no cost for the animals, someone will need to pay for the shipment. Selecting the submit button, submits the requisition and returns you to the *EnCCoMPass Animal* landing page. There is no summary page. This requisition page is the summary. Review carefully before selecting submit.

Placing Animal Orders Using the *EnCCoMPass Animal Module*

a. General Information (Figure 38)

- i. **PI:** Type in the last name of the principal investigator, a list of name(s) will propagate; select the name of interest for your search.
Note: More than one PI may appear in this dropdown menu. This will depend on the number of PI's who have granted you access to order animals on their protocols. If the PI you are ordering for does not appear, you will need that PI to amend his or her protocol and assign you animal requisitioning rights. (Refer to [How to make personnel changes in EnCCoMPass](#) ; please use the appropriate institutional hyperlink [MSKCC](#) or [WCMC](#) for detailed instructions)
- ii. **Protocol:** Select the protocol on which the animals are being ordered. Please ensure if more than one protocol appears you select the proper protocol to avoid potential future non-compliance issues. If the protocol you need does not appear, you need to be added as an Animal Requisitioner on that protocol. (Refer to [How to make personnel changes in EnCCoMPass](#); please use the appropriate institutional hyperlink [MSKCC](#) or [WCMC](#) for detailed instructions)
- iii. **Animal User:** Select the person who will be responsible for the animals once they arrive at the institution. This person's name will be printed on the cage card, and will be contacted if there are any issues involving the animals after they arrive until they are sacrificed or transferred to another user.
- iv. **Maintenance Funding Source:** Select the funding source for the daily maintenance or per diem of the animals.

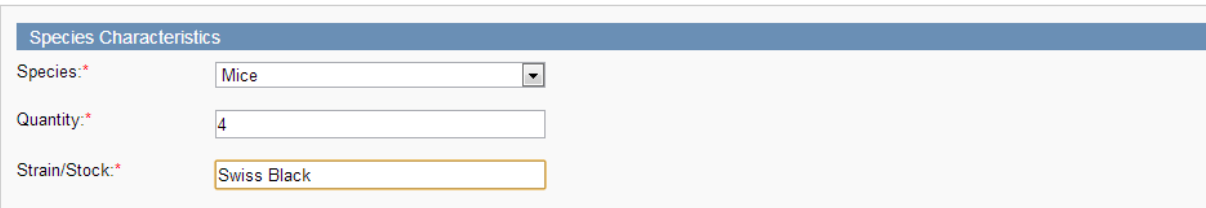


The screenshot shows a web form titled "Create Non-Commercial Requisition". Below the title is a section header "General Information" in a blue bar. The form contains four rows of input fields, each with a red asterisk indicating a required field. The first row is "PI:" with a dropdown menu showing "North, Jason". The second row is "Protocol:" with a dropdown menu showing "13-09-010, Nanoparticles and Higgs Bos". The third row is "Animal User:" with a dropdown menu showing "North, Jason" and a small blue information icon to its left. The fourth row is "Maintenance Funding Source:" with a dropdown menu showing "111-222".

Figure 38

b. Species Characteristics: (Figure 39) In this step, you define the species and characteristics of the animals you require in the first section.

- ii. **Species:** You will only be able to select Mice or Rats for Non-Commercial Orders from the drop-down box
- iii. **Strain/Stock:** Enter desired strain using thorough and appropriate nomenclature.
- iv. **Quantity:** Please select the desired quantity of animal(s) to order.



The screenshot shows a web form titled "Species Characteristics" in a blue bar. The form contains three rows of input fields, each with a red asterisk indicating a required field. The first row is "Species:" with a dropdown menu showing "Mice". The second row is "Quantity:" with a text input field containing the number "4". The third row is "Strain/Stock:" with a text input field containing "Swiss Black".

Figure 39

Placing Animal Orders Using the *EnCCoMPass Animal Module*

- c. **Quarantine Information:** If you are not sure if quarantine is required leave the box unchecked. RARC will verify if quarantine is required and if necessary check the box and return the requisition to you (Figure 40).
- d. **Rodent Quarantine is Required?:** Select this check box if you know that the animals you ordered must be quarantined. Checking this expedites your order being processed.
- iii. **Strain/Stock Described in IACUC?:** Select **Yes** if it is described in your protocol. In not:
- In order to use this strain/stock you must add it to your protocol via the amendment process. You may order these animals and they can be received and placed into quarantine but they will not be released until the amendment is approved.
- iv. **Animal are:** Select whether your animals are immunocompetent or immunodeficient
- v. **Will Animals Be Used Acutely from Quarantine?:** Select **All**, **Some** or **None**. If **All** or **Some** are selected you will need to **Describe the Acute Use**.
- vi. **Describe Acute Use:** Enter narrative of acute use.
- Note:**
- Acute use does not include breeding. Breeding is always allowed. Instead indicate if animals will need to be euthanized as part of the experimental use, before they leave the quarantine.
- vii. **Please Describe Mutation or Phenotype. Include any Clinical Abnormalities:** Provide information on any observable phenotype needed.

The screenshot shows a web form titled "Quarantine Information". It contains several sections with radio buttons and text input fields. The "Strain/Stock Described in IACUC Protocol?" section has "Yes" selected. The "Animals Are:" section has "Immunocompetent" selected. The "Will Animals Be Used Acutely from Quarantine?" section has "Some" selected. The "Please Describe Acute Use:" field contains the text "Euthanasia". The "Please Describe Mutation or Phenotype. Include any Clinical Abnormalities:" field contains the text "Homozygous". The "Husbandry Requirements:" field is empty. There are information icons (i) next to the "Quarantine?", "Acute Use:", and "Husbandry Requirements:" labels.

Quarantine Information

Strain/Stock Described in IACUC Protocol?* ☒ Yes ☐ No

Animals Are:* ☒ Immunocompetent ☐ Immunodeficient

Will Animals Be Used Acutely from Quarantine?* ☐ All ☒ Some ☐ None

Please Describe Acute Use: * Euthanasia

Please Describe Mutation or Phenotype. Include any Clinical Abnormalities: * Homozygous

Husbandry Requirements: *

Figure 40

Placing Animal Orders Using the *EnCCoMPass Animal Module*

- i. **Husbandry requirements:** Provide information on any special husbandry needed such as special feed, special water, etc.
- e. **Source Institution Information (Figure 41)**
 - ii. **Institution:** Enter the name of the source institution
 - iii. **PI:** Enter the first name, last name and e-mail of PI
 - iv. **Vet:** Enter the first name, last name and e-mail of Veterinarian
 - v. **Shipping Contact:** Enter the first name, last name and e-mail of the shipping contact.

The screenshot shows a web form titled "Source Institution Information". Below the title is a blue header bar. The main heading is "Please Provide the Following Information for Contacts at the Source Institution:". The form contains several input fields: "Institution:" with a text box containing "NYU"; a table with four columns: "First Name:", "Last Name:", and "E-mail:". The rows are for "PI:", "Vet:", and "Shipping Contact:". The "PI:" row has "Paul" for first name, "Investigator" for last name, and "PI@123.com" for email. The "Vet:" row has "Vet" for first name, "Erinarian" for last name, and "VE@123.com" for email. The "Shipping Contact:" row has "Ship" for first name, "Ping" for last name, and "SP@123.com" for email. The "Shipping Contact:" row is highlighted with a yellow border.

| | First Name: * | Last Name: * | E-mail: * |
|-------------------|---------------|--------------|------------|
| PI: | Paul | Investigator | PI@123.com |
| Vet: | Vet | Erinarian | VE@123.com |
| Shipping Contact: | Ship | Ping | SP@123.com |

Figure 41

- f. **Health Report from Source Institution:** When quarantine is required, the health report from the supplying institution is essential. Ensuring the health report is sent to our BioSecurity Veterinarian promptly will expedite your order. Please select one of the following options (Figure 42)
 - vi. Indicate if the report was already sent to the Biosecurity Veterinarian.
 - vii. Alternatively if you have the report, you can upload it directly into the *EnCCoMPass Animal* module.
 - viii. Finally, if you are going to request that the report be sent, select the hyperlink for the most current contact information for the Biosecurity Veterinarian

The screenshot shows a web form titled "Health Report". Below the title is a blue header bar. The main heading is "Health Report from Source Institution:". There are three radio buttons: "Was sent to biosecurity veterinarian" (selected), "Uploaded here:", and "Was requested from source institution and will be sent to the biosecurity veterinarian". Below the "Uploaded here:" radio button are two buttons: "Choose File" and "Upload". Below the "Was requested from source institution and will be sent to the biosecurity veterinarian" radio button is a note: "Note: This request cannot be processed without a Health Report from the source institution."

Figure 34

- g. **Housing Information**
 - iii. **Housing Room/Designation or RARC Assigned:**
 - 1. **Select Housing Room/Designation:** The Housing Room/Designation is selected by default. The dropdown lists all rooms in which the PI currently houses the species being ordered (Figure 43).

Note:

 - It is possible that no rooms will appear. This MIGHT happen if the PI DOES not CURRENTLY house any animals of this species. It is also possible that the specific room in which you want TO house the animals does not appear. As an example, this might happen when you need to use

Placing Animal Orders Using the *EnCCoMPass Animal Module*

a hazard room, but DO NOT CURRENTLY HAVE ANIMALS IN THE ROOM.
In either of these situations select the RARC Assigned option.

2. **Select RARC Assigned:** Once RARC Assigned is selected you will be provided the opportunity to select the facility the animals should be housed in rather than a specific room. It is important that you provide additional information in the area provided so the facility manager can select the appropriate location for your animals. If the order is for large animals, provide information about the project the animals will be used for. IF HAZARDS ARE INVOLVED, INDICATE THE HAZARD (Figure 44).
- iv. **Additional Information:** Enter any instructions to assist the Facility Manager in assigning an appropriate room.




Figure 35

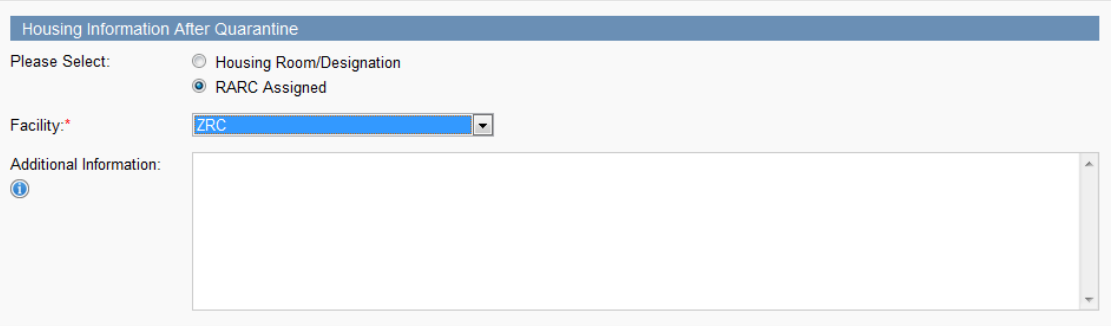


Figure 36

h. **Delivery Information** (Figure 45)

ix. **Please Select:**

1. **I authorize payment of shipping costs:** If this option is selected please select a [Funding Source](#) from the drop-down box.
2. **Sending institution will be responsible for payment of shipping costs:** If this option is selected no funding source is necessary.

x. **Funding Source:** Enter the appropriate funding source to pay for the shipping costs of the order.

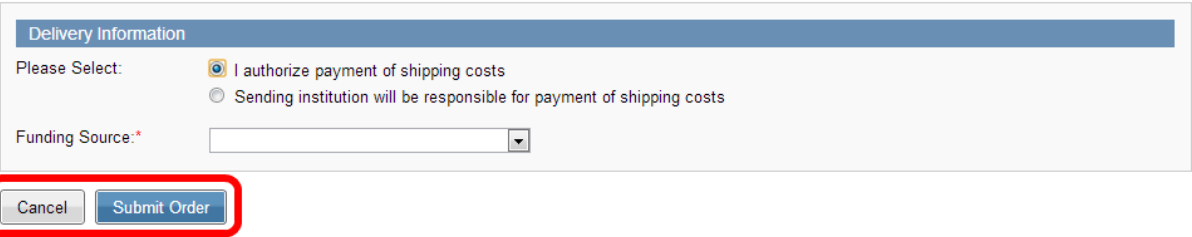
- i. **Select Submit Order :** Carefully review the summary and confirm that all the information is accurate (Figure 45).
- j. Select [Submit](#) button to place order. You will receive an e-mail from *EnCCoMPass* indicating the order has been placed.

Note :

- **Selecting [Cancel](#) will cancel the requisition and send you back to the Animal module dashboard.**

Placing Animal Orders Using the *EnCCoMPass Animal Module*

- If you do not enter required information. The system will not let you proceed until all of the fields with a small red asterisk are completed. If you miss a required field, the system will highlight the field in red. Depending on your screen size, IF YOU HAVE SELECTED SAVE AND CONTINUE AND IT APPEARS NOTHING HAS HAPPENED you may have to review all the fields TO FIND THE FIELD THAT IS MISSING INFORMATION
- k. After submission, you will be returned to the *EnCCoMPass Animal* landing page where the requisition will have been added to your dashboard. Each requisition is assigned a unique number by the application.



Delivery Information

Please Select:

☒ I authorize payment of shipping costs

☐ Sending institution will be responsible for payment of shipping costs

Funding Source:*

Figure 37