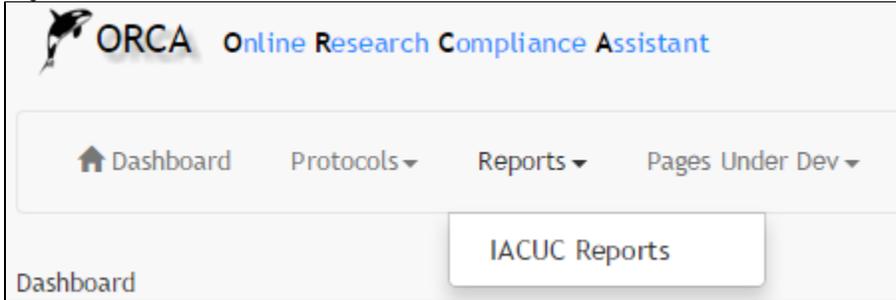# Reports

If you do not have access to the below reports, please contact blalock@uthscsa.edu or mendozamm@uthscsa.edu .

To access Reports:

1. Log onto O.R.C.A

2. Click Reports
3. Click IACUC Reports

The first section searches for Study Personnel within a protocol by: Protocol No., PI or Co-PI. The last option **All IACUC Protocol Personnel** will provide you a list of all individuals and the protocols they are on.

Personnel			
Study personnel by Protocol		⊙ View	Displays a listing of all study personnel for a specified protocol number
Study personnel by PI	Select PI ▾	⊙ View	Displays a listing of all study personnel grouped by protocol for the selected principal investigator (PI)
Study personnel by CO-PI	Select CO-PI ▾	⊙ View	Displays a listing of all study personnel grouped by protocol for the selected co-principal investigator (CO-PI)
All IACUC Protocol Personnel		⊙ View	Displays a listing of all persons working on an IACUC protocol

The second section searches for species within a protocol by: Protocol No., PI, or Co-PI.

Species			
Species by Protocol		⊙ View	Displays a listing of all species for a specified protocol number
Species by PI	Select PI ▾	⊙ View	Displays a listing of all species grouped by protocol for the selected principal investigator (PI)
Species by CO-PI	Select CO-PI ▾	⊙ View	Displays a listing of all species grouped by protocol for the selected co-principal investigator (CO-PI)
Species Lookup Table		⊙ View	Displays a listing of all records in the species lookup table including their order variance percentage and active status

Personnel Reports:

__Search by Study personnel by Protocol__
Using the first field, personnel by Protocol will allow you to type an individuals name

__Search by PI__, James Garrison.
All protocols associated with the PI will display within the left menu. If we searched by Co-PI, all protocols that individual is associated with will also be displayed within the left menu.

The personnel listed will also include their contact status: POC (point of contact); Emergency; and if training has been verified. COI status is not yet available.

If personnel is assigned as either Co-PI or Delegate, that will be indicated within their name field, first column.

Clicking on a person's name will display contact information (phone/email) and links to view the person's training on the left hand side of the page.

Search by Co-PI
Use this field to search for protocols by the Co-PI to a protocol

Search Results for PI James Garrison garrisonj3@uthscsa.edu

James Garrison
/ 99999x

ORCA ID	Legacy ID	Status	Regulatory Expiration	Title	Co-PI
	99999x	APNC-Approved / No Changes	2099-12-31	Test Protocol - Created for IT Testing	Cheryl Blalock blalock@uthscsa.edu

Name	Email	Role	POC	Emerg. Contact	Training Verified	Has COI
Cheryl Blalock [COPI]	blalock@uthscsa.edu	Participant performing experimental manipulations or working with animals				
Denise Cobbs	cobbsd@uthscsa.edu	Participant performing experimental manipulations or working with animals	✔		✔	
Michelle Mendoza	mendozamm@uthscsa.edu	Participant performing experimental manipulations or working with animals	✔	✔		
Annette Rodriguez	rodrigueza34@uthscsa.edu	Participant NOT performing experimental manipulations or working with animals				

Menu

Clicking on an individual within study personnel will place their information on the left menu. Within the menu, **Training** options will be shown. If a training type, CITI or Knowledge Center is clicked, a window will display with course work for either CITI or Knowledge Center.

James Garrison

/ 99999x

Cheryl Blalock

Phone
Work: (210) 567-8252

Training

CITI

Knowledge Center

Training History   ✕

Knowledge Center Course Name	Course Type	Last Completed	Affiliation
HIPAA Privacy Training Level 2 *Office of Regulatory Affairs & Compliance (210) 567-2014*	Self-Paced	05/15/2013	Employee
GCAT - General Compliance Awareness Training *Office of Regulatory Affairs & Compliance (210) 567-2014*	Self-Paced	06/21/2013	Employee

New Report - December 2014
Search by All IACUC Protocol Personnel

Clicking the View button will provide you a list of all individuals on IACUC protocols and the Protocols they are assigned to.
Click **Ctrl+F** to search for a specific person

Protocol No⇕	Person	⬦	Role	⬦	Protocol Title	⬦	Protocol Details ⬦
2099999AB 99999x	Mendoza, Michelle Marie mendozamm@uthscsa.edu		Participant-WorksWithSubjects		Test Protocol - Created for IT Testing		Status: Active Expiration: 2099-12-31

Locate contact information for the person:

1. **Click** on the Protocol No. in the first row
2. You will be directed to the Study Personnel for Specific Protocol report
3. Click on the person's name, and you will see additional information on the left menu with phone number and email address.

If the PI has designated a POC or Emergency contacted, they will be listed on this page.

Species Report:

The below example shows the search by PI, James Garrison. All protocols associated with the PI will display within the left menu. If we searched by Co-PI, all protocols that individual is associated with will also be displayed within the left menu.

Species Report: Column Names and Definitions

Name: the name of the species
Species Code: code used in the People Soft purchasing system
Regulated: if checked indicates this is an USDA regulated species
Approved: the total number of animals approved on the protocol

Total Used: the total number of animals used on the protocol
Added Since Last Report: the number of animals ordered through People Soft since the Last Report Date
Last Rpt Date: the last date the number of animals added was reported. This date's source can be from either the last date an <u>on-line progress report</u> was submitted (**ORCA Prg Rpt**), the last date <u>someone from DLAR was asked for the number</u> is preparation of beginning a progress report and DLAR recorded the date in CEDAR (**CEDAR Query Date**), or if neither of previous two dates are available then the number <u>purchased in the last year</u> is used. (**Today -1 year**),

Note: If a progress report was <u>not</u> submitted through ORCA last year, the Rpt Date Source will show Today -1 year, and the # Added Since Last Rpt will be an estimate. You will still need to confirm with LAR.

Examples:

Name	Species Code	Regulated	Approved	Total Added	# Added Since Last Rpt	Last Rpt Date	Rpt Date Source
Mouse(Mice)	34	-	300	0	0	08/26/2013	Today -1 year

Indicates there have been 0 mice species added to the protocol since 8/26/2013. **Today -1 year** indicates the system does not have an accurate date for the last report date.
When the PI/CoPI or Delegate access their protocol to submit a progress report, the number displayed will be **0.**
The PI/CoPI or Delegate can edit this number if the number.

Name	Species Code	Regulated	Approved	Total Added	# Added Since Last Rpt	Last Rpt Date	Rpt Date Source
Mouse(Mice)	34	-	750	153	4	02/25/2014	CEDAR Query Date

Indicates 4 mice species have been added to the protocol since 02/25/14. **CEDAR Query Date** indicates the system is pulling from **CEDAR (i.e. gathering results from PeopleSoft)**.

When the PI/CoPI or Delegate access their protocol to submit a progress report, the number displayed will be **4.**

The PI/CoPI or Delegate can edit this number if the number of species added is incorrect due to breeding, transfers, or orders not completed.

Name	Species Code	Regulated	Approved	Total Added	# Added Since Last Rpt	Last Rpt Date	Rpt Date Source
Frog(s)	04	✔	500	5	0	08/25/2014	ORCA Prg Rpt

Indicates 0 frog species have been added since the last **approved** progress report which was submitted on 8/25/2014 by the PI/CoPI. **OR CA Prg Rpt** indicates the system is getting the last report date from an on-line progress report submitted through ORCA.
When submitting the next progress report, the PI/CoPI or Delegate can edit this number if the number of species added is incorrect due to breeding, transfers, or orders not completed.