1. **Create a Personnel Modification**

   - **Current State**
     - Approved
     - View IACUC Protocol
     - View Differences
     - Protocol View
     - Print and Go – Full Protocol
     - New Order/Transfer
     - New Animal Event
     - Add Funding
     - Add Personnel
     - New Annual Review
     - New Monitoring Report

   Research Staff can add a person to their protocol by creating a personnel modification without creating a significant modification.

   - On your homepage, go to Approved tab and select Protocol
   - Select the **Add Personnel** activity on the protocol workspace

   Note: Multiple personnel modifications can be open at the same time for a given protocol.

2. **Add/Remove Personnel**

   - Add/Remove associated Research Staff within the study staff grids. The smart search fields can search by name or Net ID.
   - Select **Save** to move the personnel into the **Added Personnel** grid.
   - Remove Research Staff by selecting the X on the right side of the row.
   - Select **Continue** to move to the Study Staff Competencies screen.
Reviewing Competencies

**Study Staff Competencies**

Based on the protocol content, the following animal training competencies have been identified.

**All competencies** (hide)

- **Animal Program Personnel**
  - Reasons for inclusion
  - All Research Protocols
    - Reporting Animal Care and Use Concerns
    - Working with the IACUC
    - Scientific Rigor and Reproducibility

- **All Animal Users**
  - Reasons for inclusion
    - Assigned as study staff
  - Courses
    - L1 Medical Surveillance
    - Euthanasia Policy, Guidelines and Procedures
    - Reporting Adverse Events Policy
    - YARC Facility Training Part 1

- **Rodent Basic**
  - Reasons for inclusion
    - Use of animals requiring L1 Medical Surveillance**
    - Use of any rodent species
    - Use of mice or wild rodents species
    - Use of rat
  - Courses
    - Introduction to Mouse
    - Introduction to Rats
    - Rodent Basic Principles
    - L1 Medical Surveillance Program

For the Personnel Modification to be approved, all courses under **All Animal Program Personnel** and **All Animal Users** must be complete. Courses require sign-in to TMS or the AALAS Learning Library (ALL). Institutional sign-in to the AALAS Learning Library is required to access Yale courses, instructions can be downloaded. Additional information can be found on the OARS website and the IACUC Training Policy.

**All Animal Program Personnel**
- Reporting Animal Care and Use Concerns (ALL)
- Working with the IACUC (ALL)
- Scientific Rigor and Reproducibility (ALL)
  - Course in development, will be required when complete

**All Animal Users**
- L1 Medical Surveillance (TMS or OARS website)
  - Send Initial Animal Handler’s Questionnaire to Yale Employee Health Department (employeehealth-business@yale.edu)
  - L2, L3, L4 Medical Surveillance required for other species competencies, L1 will be included
- Euthanasia Policy, Guidelines and Procedures (ALL)
- Reporting Adverse Events Policy (ALL)
- YARC Facility Training Part 1 (TMS)

Additional competencies must be assigned based on the Research Staff’s role on the protocol. Additional courses need only to be assigned, not completed at the time of submission. A personnel modification with no additional competencies assigned cannot be approved.

*Some course currently listed under **All Animal Users** may not be shown as complete:
- Pain Management in Laboratory Animals is no longer required for **All Animal Users** and will be removed in a future update
- YARC Facility Training Part 1 and 2 will not appear complete due to an error and will be fixed
  - YARC Facility Training Part 1 is required
**Assigning Competencies**

Research Team Unfilled Training Requirements

Each research team member who has not fulfilled their associated protocol training requirements (competencies) is shown below. Review your research team competencies and select all additional competencies in which the staff should complete prior to working with animals or conducting associated research procedures. Select a due date for these training requirements. The study staff will receive an email notification of the requirement upon submission of the protocol.

**Note:** If a team member has completed all required competencies, they will not be shown in the list below. Also, study staff may not work with animals or conduct research procedures until after the associated training is completed.

- **Show Competencies**
- **Show Courses**

### Research Team Unfilled Training Requirements

- **Claudia Swanson**
  - All Animal Program Personnel
  - Reporting Animal Care and Use Concerns
  - Working with the IACUC
  - Due Date: Mon Aug 01 2022

- **Helen Sobol**
  - All Animal Users
  - Immediate
  - Due Date: Mon Aug 01 2022

- **Rodent Basic**
  - Introduction to Mouse
  - Introduction to Rat
  - Rodent Basic Principles
  - LT Medical Surveillance Program
  - Due Date: Tue Jan 31 2023

- **Rodent Advanced**
  - USDA Species (Non-NIP)
  - Not Required
  - Due Date: None

- **Rabbit Handling and Restraint**
  - Not Required
  - Due Date: None

- **Retr-o-ral Blood Collection of Awake Rodent**
  - Not Required
  - Due Date: None

- **Troy Hallman**
  - Show profile

**RESEARCH TEAM UNFILLED TRAINING REQUIREMENTS**

Research Team shows the unfulfilled requirements for each Study Team member on the protocol. The PI/Lab Manager should decide which additional competencies should be fulfilled by their Research Staff.

9. The Show/Hide button on Competencies and Courses will toggle the Research Team view.

Assigning a Competency

10. If the competency should be completed by a Research Team member, select the timeline for completion from the dropdown.

The due date is an estimated date for completion. Assignments will not be sent to staff until the protocol/modification is submitted.

11. If a competency is not listed under a researcher’s name, the requirements have been met.

Select **Finish** to proceed to submission.

12. Select **Submit Modification** to submit for review.