**Create a Protocol (PI): Experiment(s)**



**Work Instructions:**

1. Log into Click Portal.
2. Click the **IACUC** tab at the top and then open your research team workspace.
3. Click **Create Protocol**.

Note: We recommend that you first create the substances, and then the procedures, BEFORE you create your protocol because this sequence is efficient and reliable. These work instructions assume you’ve created the substances and procedures.

1. Complete each page, paying attention to the fields explained below. Click **Continue** in the Navigation Bar to move through the pages. Required fields are marked with an asterisk (\*).

**Basic Information**

* **6. What is the intention of the animal protocol\***: The SmartForm adds and subtracts pages and questions based on your selection here. For instance, if you select Breeding, the SmartForm adds a Breeding page. For the remainder of this work instruction, we’ll focus on 5 pages that are present in all variations of the SmartForm (the notable exception being a Holding Protocol).

**Protocol Team Members**

* **1. Identify each additional person involved in…the research**: Add each person who will edit the protocol or perform any of the research procedures. Do not add the PI here.

**Experiments**

1. **Define the experiments…\*:** Click **Add.** The **Edit Experiment** page opens. Complete the form, paying special attention to:

**Edit Experiment**

1. **Species:** The species carries over from the research team workspace, but you can change this here.
2. **Select common procedures:** These procedures apply to all animals in the experiment.
3. **Select variable procedures:** These procedures apply to some of the animals or differently across animals in the experiment.
4. **Distribution of the total number of animals by pain category\*:** Click the **(?) Help Button** to see a list of the pain categories. You are going to revisit the numbers you list here on the **Animal Justification** page.

Click **OK**, or click **OK and Add Another** if you’re going to add another experiment. Alternatively, you can click OK, return to the Experiments page, then click **Copy**. This copies the experiment; make any necessary adjustments to the newly copied experiment. After completing the experiments, click **Continue**.

**Procedure Personnel Assignment**

1. **Select the team members who will be performing each procedure\*:** Click **Update**, then select the team member for each procedure. After clicking **OK**, complete the rest of the page, then click **Continue**.

**Animal Justification**

1. **Click update to indicate the actual number of animals to be used or produced\*:** Click **Update**, then enter the actual number of animals for that pain category.
2. **If the number of animals in experiments do not match the actual animal count, explain the discrepancies** If the Actual Number column and the Animals Identified in Experiments columns do not match in the table in question 3, you must provide an explanation before proceeding.

**Alternatives**

1. **Record all searches for alternatives for each procedure that causes pain or distress:** This page is required if you have animals in the D or E pain categories. Click **Add** and complete the page.
2. After completing the rest of the SmartForm, click **Finish.** You are taken to the protocol workspace page. You can continue to edit the protocol (**Edit Protocol** button) until you submit it for review. The protocol remains in the Pre-Submission state.

