USDA

USER GUIDE:
NCAH PORTAL - NVSL

Last Revised: 05/2023

Version: 2.0

MAIN MENU

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HOW TO LOG IN

How to log in:

1. **Access the Portal:**

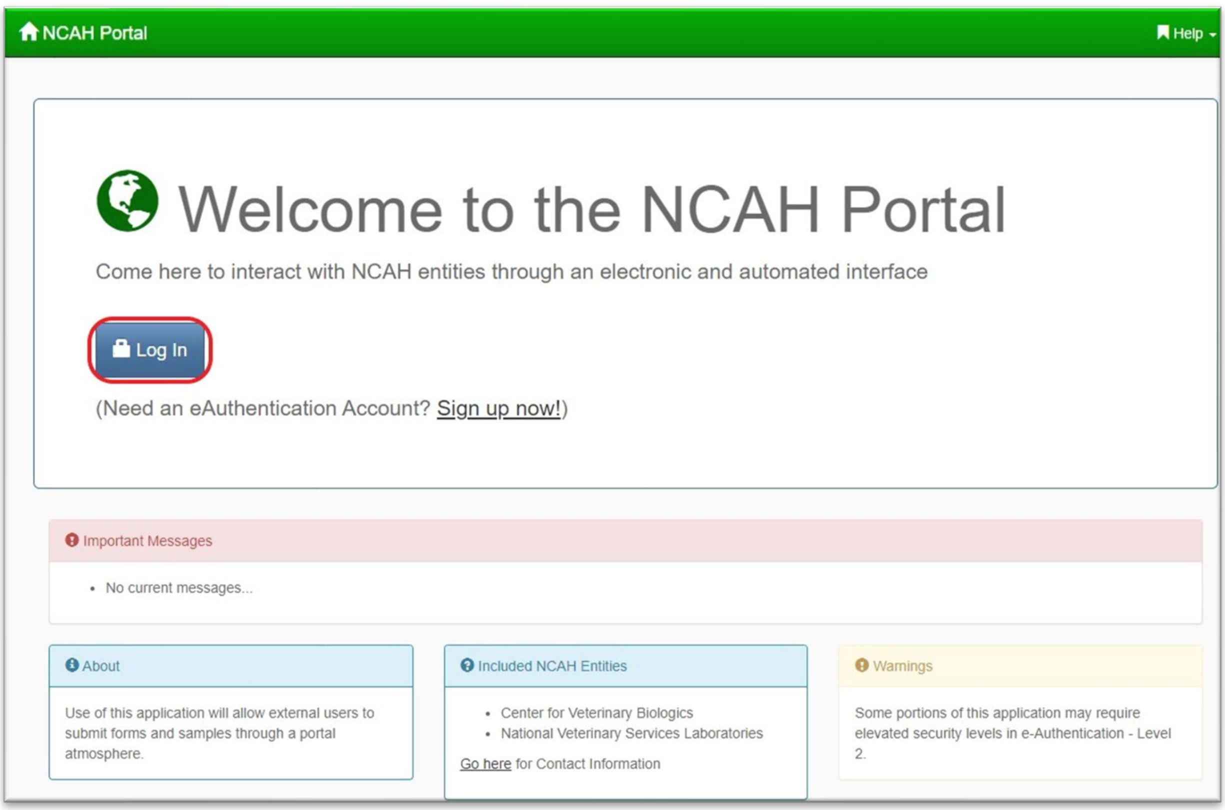
https://ncahappspub.aphis.usda.gov/NCAHPortal/auth/home

***NOTE: If this is your first-time accessing portal since you signed up for an eAuthentication account, you may be redirected automatically to the eAuthentication login page. A Level 2 eAuthentication is REQUIRED to use the NVSL Portal.**

You will see the NCAH Portal log in screen (see picture below).

2. **Select "Log In"**

If you **do not** have a portal account, select the **"Sign up now"** hyperlink & follow the prompts.



You will be directed to the eAuthentication Login page.

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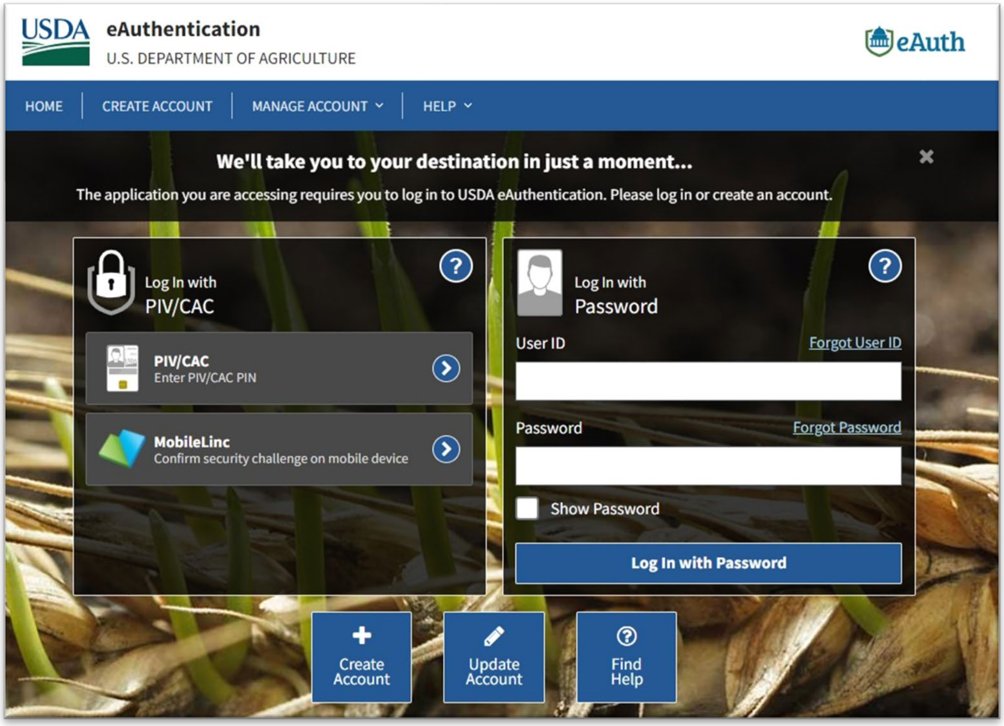
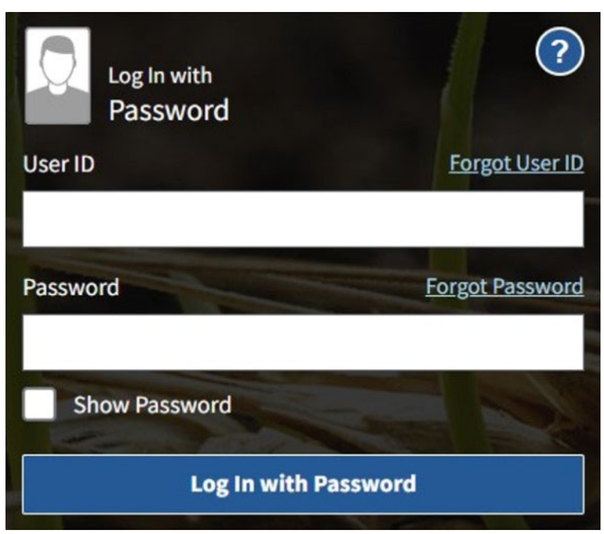
HOW TO LOG IN



3. **There are two ways to log into the Portal (LincPass/MobileLinc or User ID & Password) please see below instructions for examples of each.**

   A. <u>User ID & Password</u>

   A. Click in the "User ID" box & type the eAuthentication user ID that you received after signing up with eAuthentication.
   B. Click in the "Password" box & type your password.
   C. Click the "Log In with Password" button to log in.



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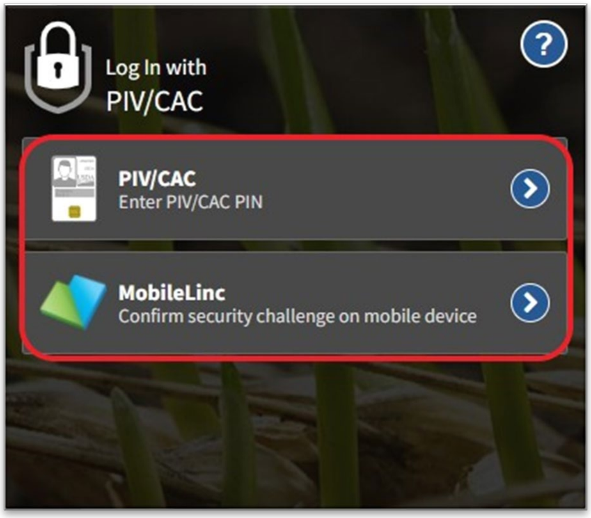
HOW TO LOG IN

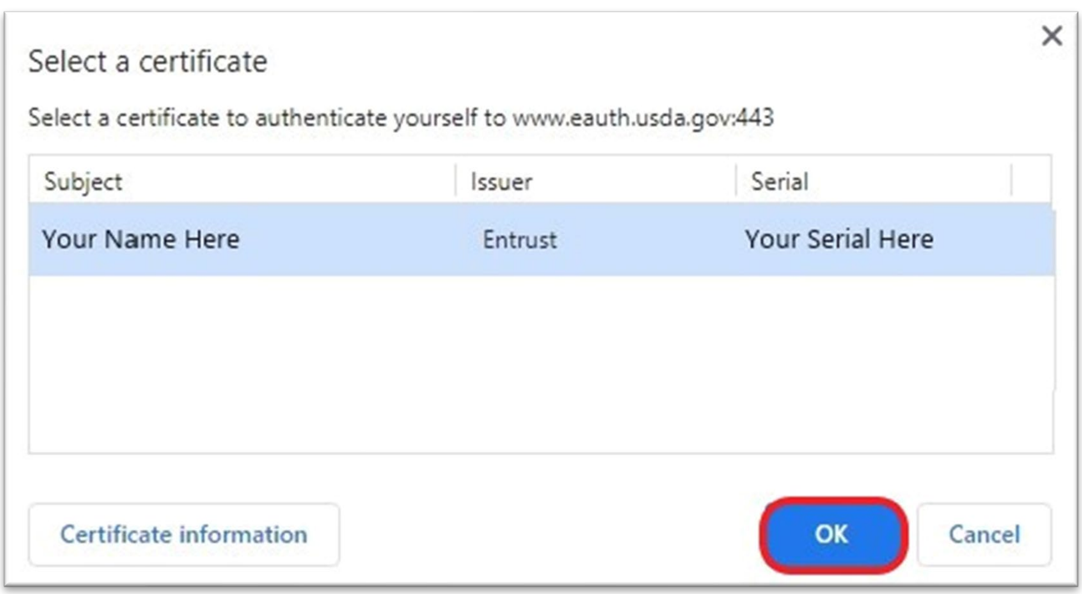
B. LincPass or MobileLinc

A. To login with your LincPass select the **"LincPass (PIV)"** button.
B. To login using a mobile device select the **"MobileLinc"** button.



NOTES:
-If using a mobile device, follow the instructions on your device and you will be automatically redirected to the portal dashboard.
-If using a computer & LincPass, a dialog box will appear asking for confirmation of your certificate.

C. Confirm your certificate & select "OK."



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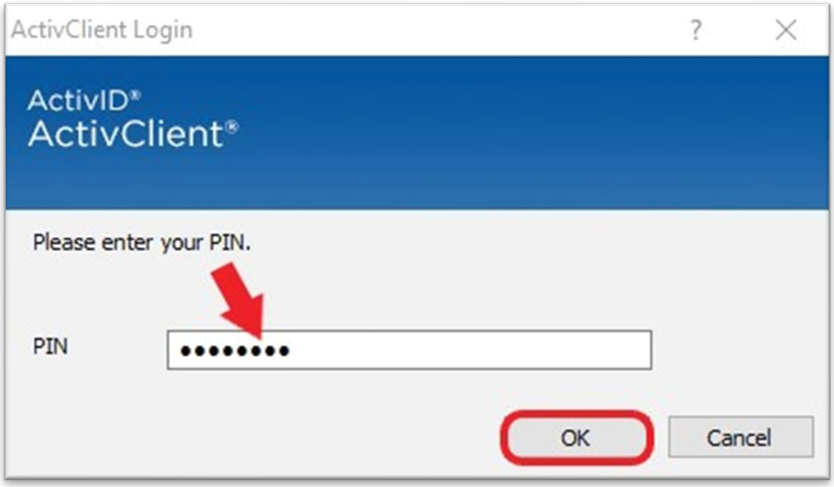
HOW TO LOG IN

D. Enter your LincPass/MobileLinc pin & select **"OK."**



You will be automatically redirected to the Portal Dashboard

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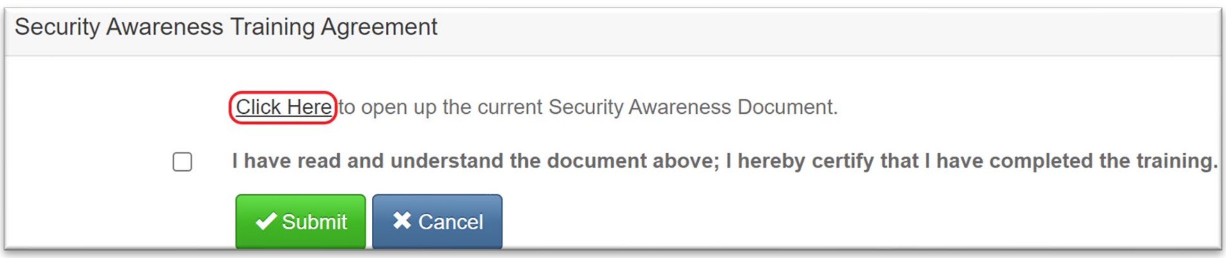
HOW TO LOG IN

4. Annual Security Awareness Training

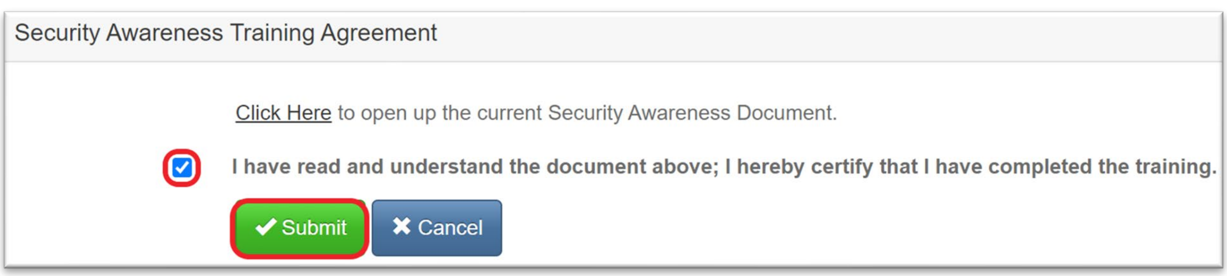
***ATTENTION*: If this is your first-time using the portal, or it has been over a year since you read the "Security Awareness Document," you will be directed to the Security Awareness Training page. You are required to read the document & attest to your understanding before you can proceed to the portal dashboard.**

****If you've already completed the "Security Awareness Training" for the year, click HERE to skip to the Portal Dashboard****

1. Select **"Click here,"** to read the Security Awareness Document.



2. When finished reading the document, click on the checkbox to attest to your understanding of the document & select the **"Submit"** button.



You will be automatically redirected to the Portal Dashboard

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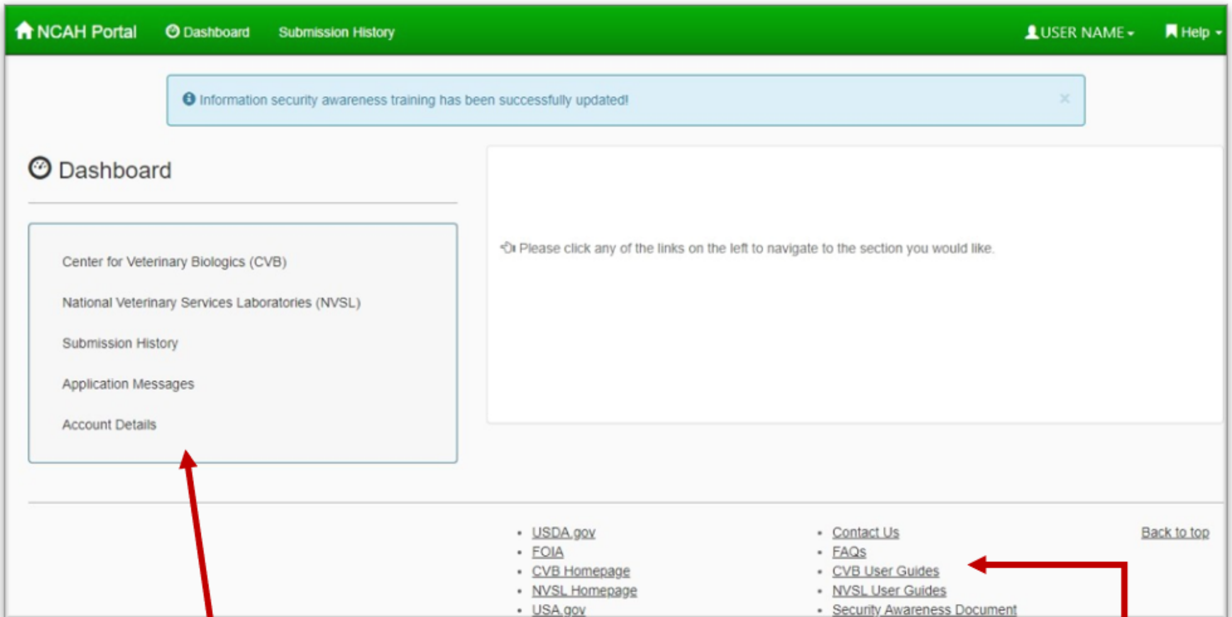
HOW TO LOG IN

PORTAL DASHBOARD



Left navigation menu: you can choose which laboratory you wish to submit to, see your two-week submission history, messages, access your account details & more.

Bottom navigation: you can choose from various informational links including each section's homepage, contact us, guidance documents, frequently asked questions & more.

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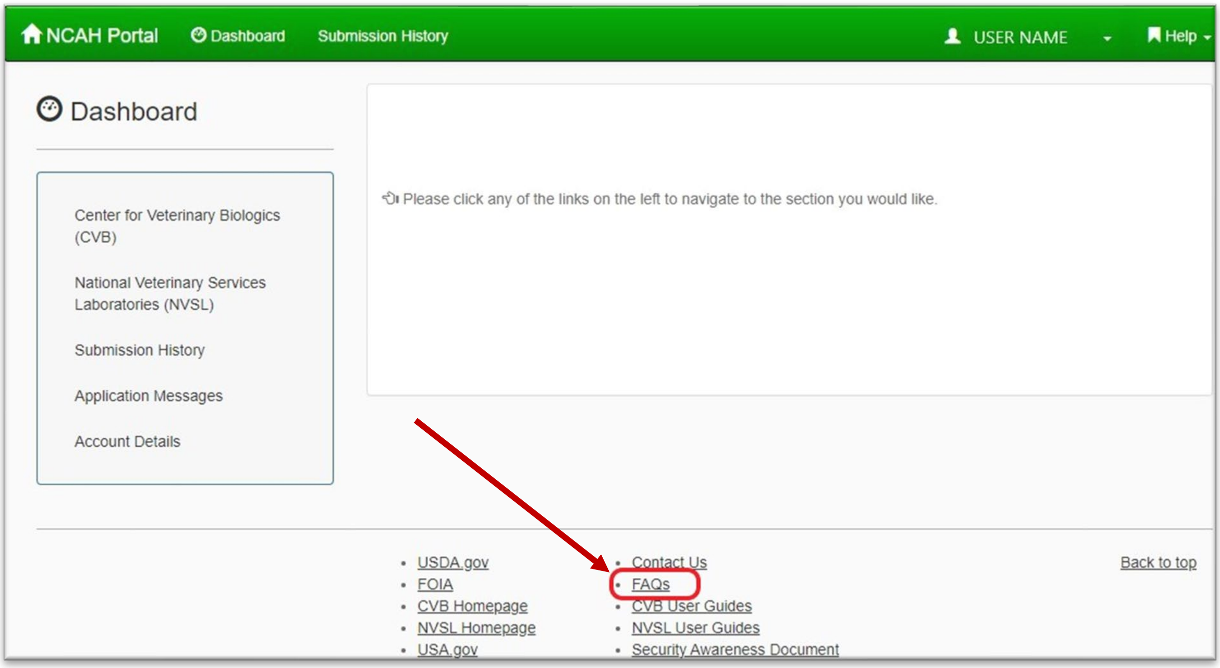
FREQUENTLY ASKED QUESTIONS

Frequently Asked Questions:

These instructions will show you how to navigate to the "Frequently Asked Questions" page & how to view questions & answers asked by other users.

1. From the Portal Dashboard select "FAQs" from the Bottom navigation panel.



You will be redirected to the FAQ page.

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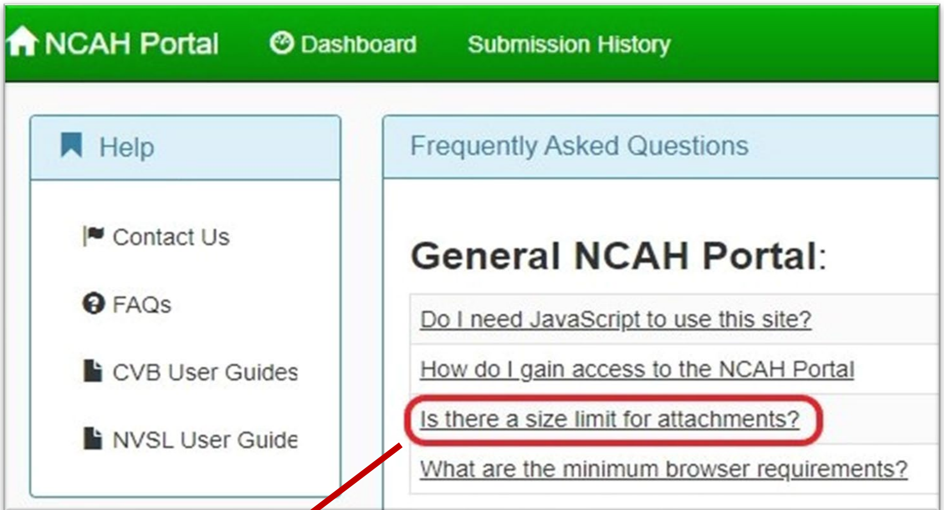
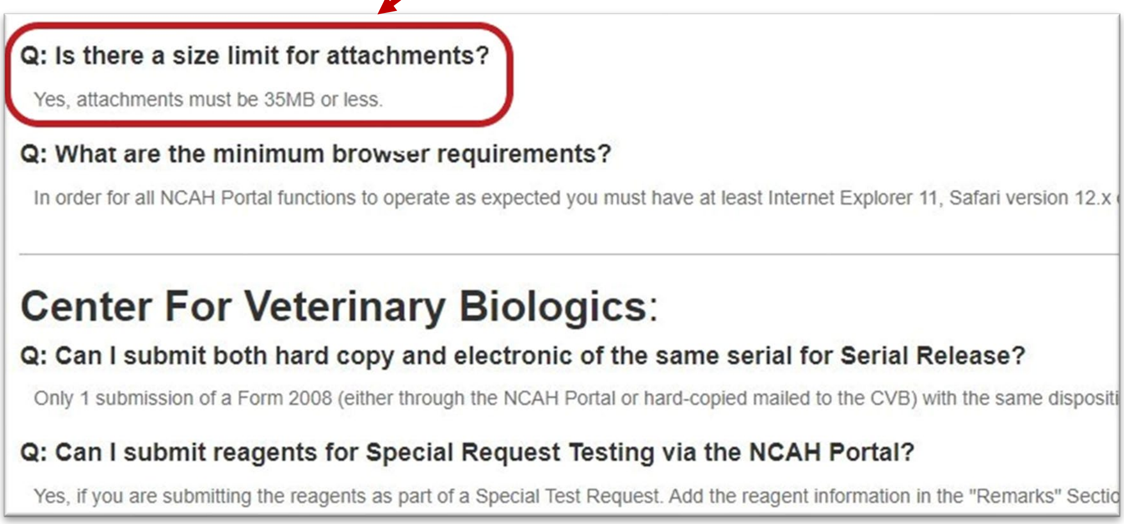
FREQUENTLY ASKED QUESTIONS

On the FAQ page you will find both questions & answers. You can browse or click on the desired question you would like to view & you will be taken to the answer farther down the on page.





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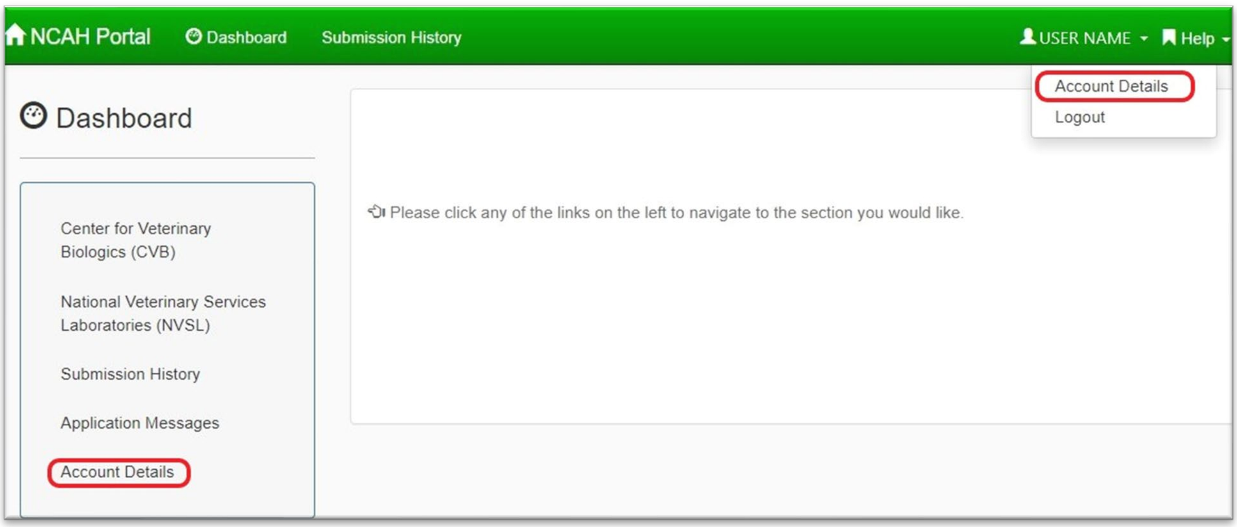
ACCOUNT DETAILS

Account Details:

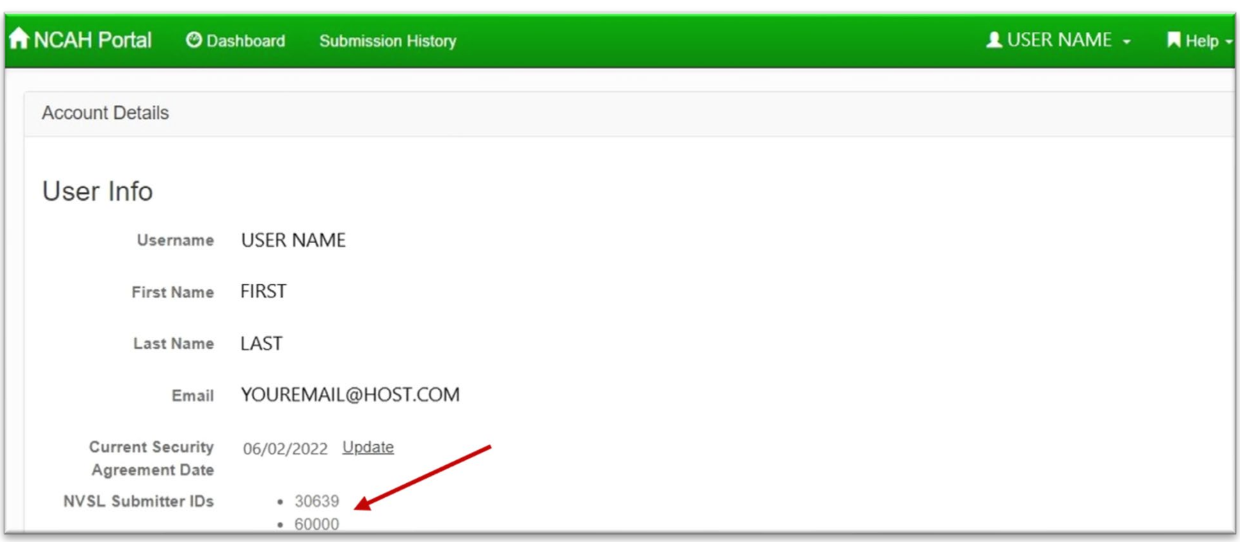
These instructions will show you how to access the account details page to view user information.

1. Accessing the Account Details Page

A. Click on your username found at the top right side of the screen to open a drop-down menu & select Account Details or select Account Details on the left navigation panel.



Delegate Accounts: if you are a delegate for a registered Submitter, you will see the screen below.



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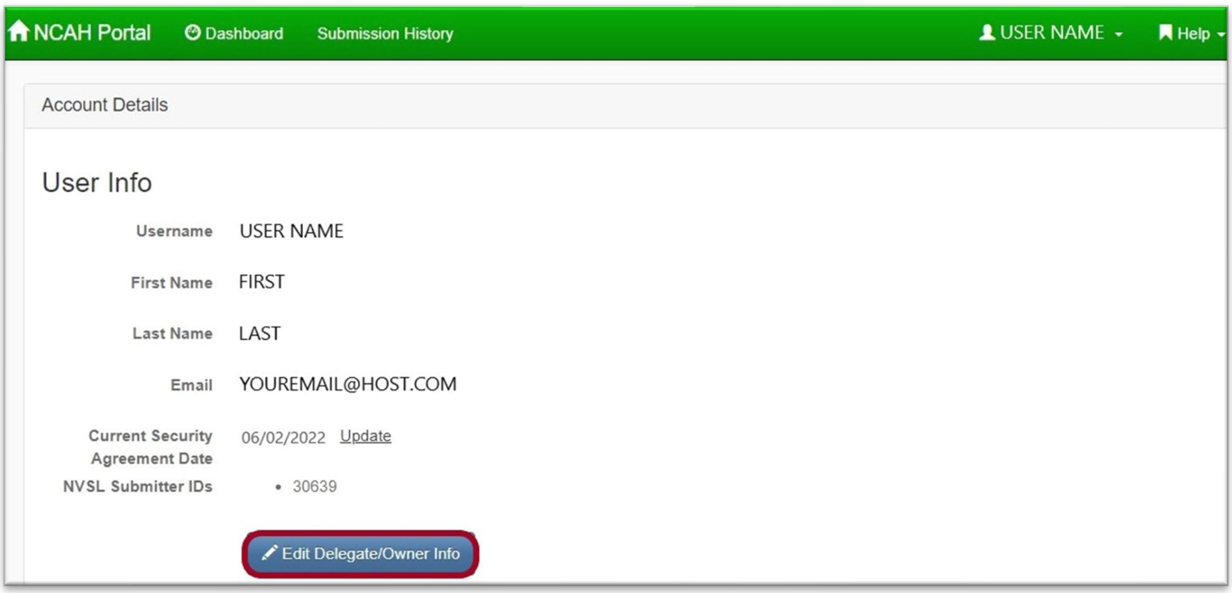
ACCOUNT DETAILS

"NVSL Submitter IDs" is a list of submitter ID numbers for whom you can submit on-behalf of as their delegate. Their information will auto-populate on your submission forms, do not change auto populated submitter information!

If you are a **Submitter & we have received your initial portal submission**, you will see the screen below.



****The "Edit Delegate/Owner Info" button will ONLY appear after the Submitter's FIRST submission has been received & processed at the NVSL! Do not allow people you intend to register as delegates send submissions until AFTER you have registered them as delegates in the submission portal!****

****ONLY Submitter accounts can add/remove delegates** (by eAuthentication username) & add animal owners for whom they submit samples for often. Doing this saves time on the electronic submission forms by allowing information to populate automatically in the correct fields. This means one does not have to enter submitter & owner information for every submission.

*If submitter information (name, address, email, phone, fax, etc.) needs to updated, click HERE to access the VS Form 4-10, or click the "Update Info" radio button when filling out the submission form (available on select forms).

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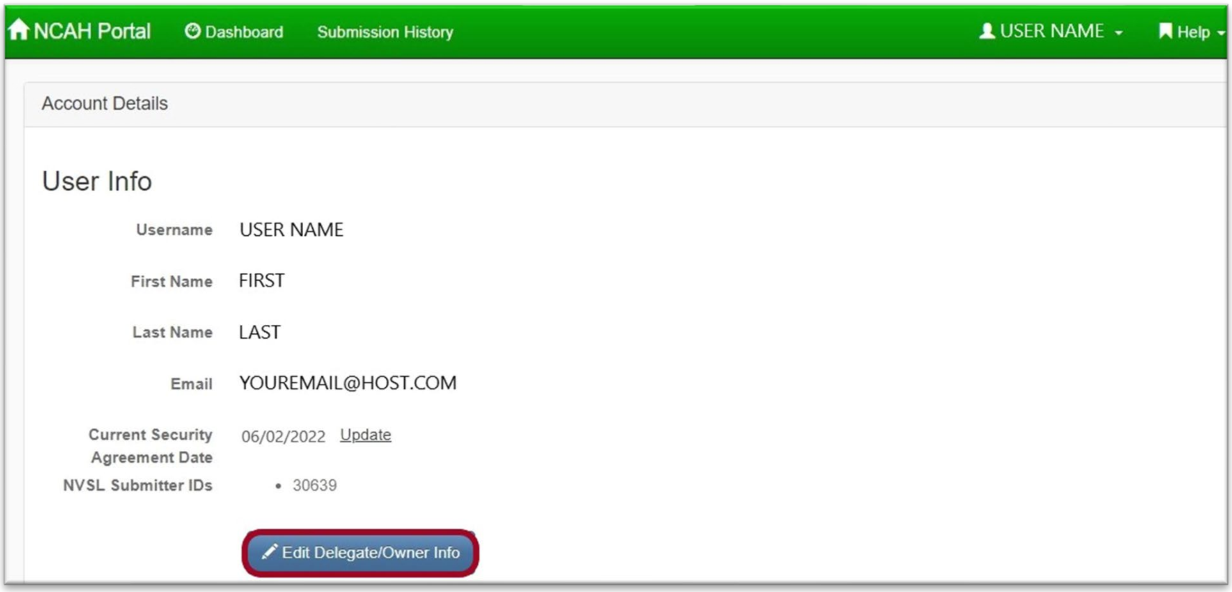
ACCOUNT DETAILS

2. Accessing the "Edit Delegate/Owner Info" page

A. Access your account details page.

B. If you are a **Submitter & we have received & processed your first portal submission**, you will see the screen below.



****The "Edit Delegate/Owner Info" button will ONLY appear after the Submitter's FIRST submission has been received & processed at the NVSL! Do not allow people you intend to register as delegates send submissions until AFTER you have registered them as delegates in the submission portal!****

C. Press the "Edit Delegate/Owner Info" button to be taken the "Edit Delegate/Owner Information" page.

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3. **Add a new delegate:**

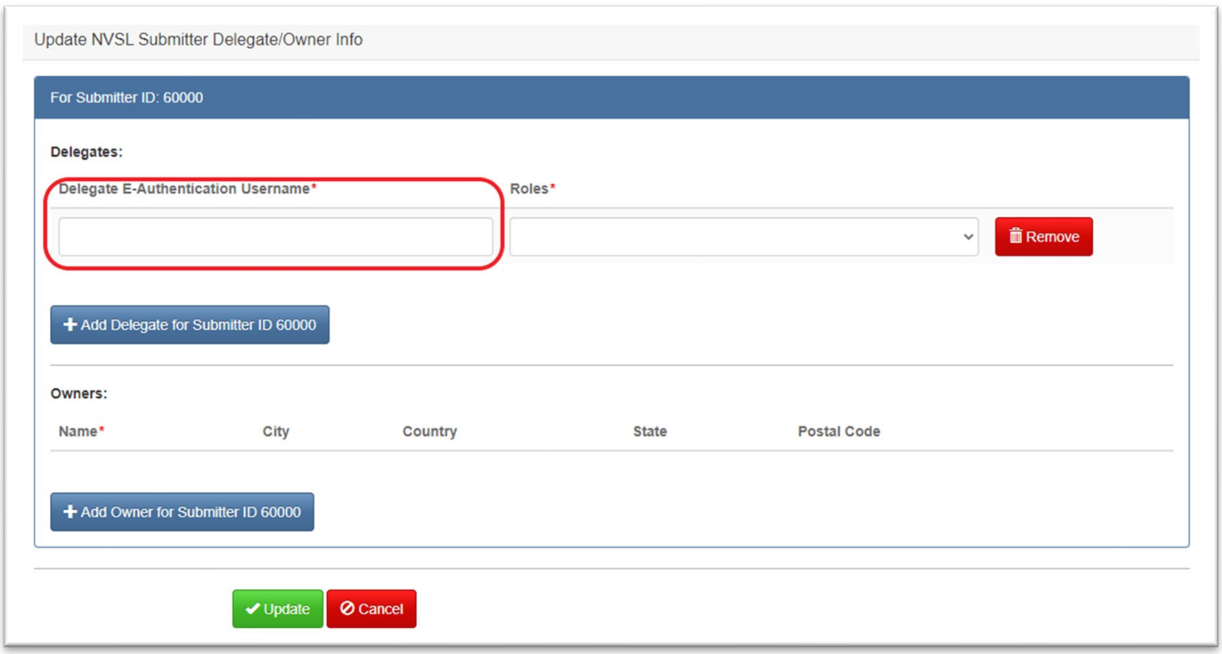
   A submitter may delegate privileges to a person to act as a proxy on behalf of the submitter. Delegates can be granted different 'roles' contingent on which privileges a submitter wishes to delegate.

   A. eAuthentication Username: An eAuthentication account is required to be qualified as a delegate.

   I. Click here to register for eAuthentication.

   II. Click here for eAuthentication FAQs.

   III. Once registered, enter the delegate's eAuthentication username into the "Delegate's eAuthentication Username" field.



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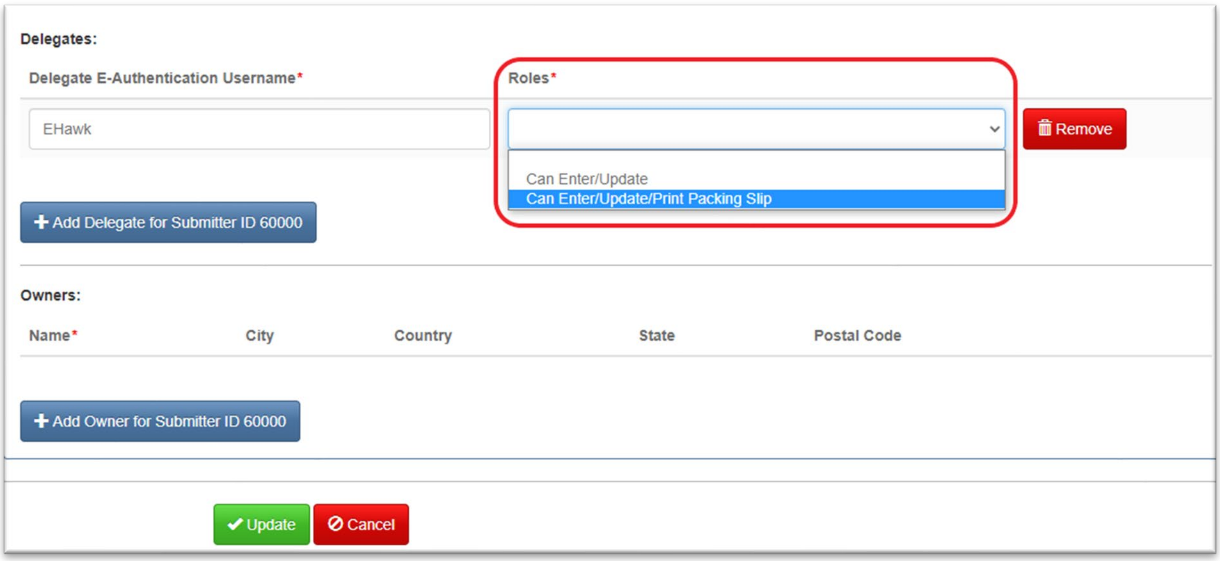
B. **Roles**: Select a role for the delegate:
   I. "Can Enter/Update" – This role allows the delegate to enter & update submission information. **It does not allow the delegate to print the packing slip**. This reserves the privilege of reviewing submission information before the packing slip is printed.
   II. "Can Enter/Update/Print Packing Slip" – This role allows the delegate to enter/ update submission information **&** print the packing slip**.** In this role, the delegate is trusted to review the submission form for accuracy & completeness before the submission & packing slip are mailed.



C. Click the "Update" button to save the new delegate & activate their new role.
   I. **To change an existing delegate's role**: simply choose the new role from the drop down & click the "Update" button.
   II. **To add additional delegates**, press the "+ Add delegate for submitter ID" button. If you click too many times you can press the "**Remove**" button to remove unused entry lines.
   III. **To cancel all changes**, press the "**Cancel**" button to cancel any changes you've made on this page.

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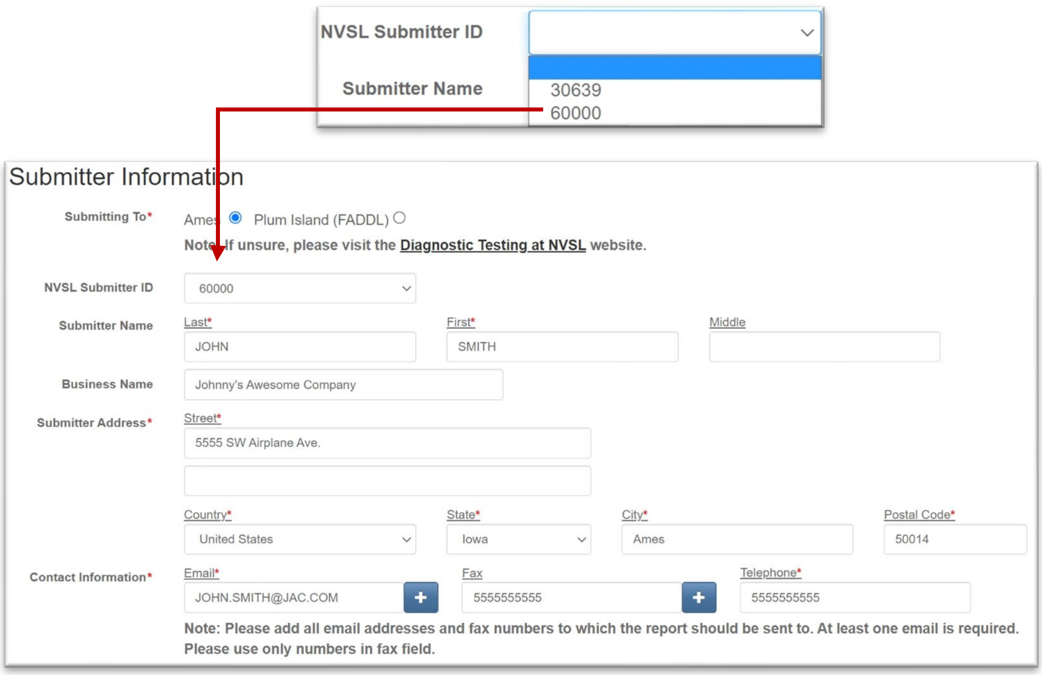
ACCOUNT DETAILS

4. Delegate Powers and Instructions:

A. When a delegate fills out a portal submission form, they must choose from a dropdown list of submitter IDs. Since delegates submit as a proxy of the submitter; delegates should **NEVER** enter their own contact information into the submission form! Once a submitter ID has been selected from the dropdown menu, the chosen submitter's information will auto-populate in the appropriate fields.



B. Changing contact information on the submission form **will not** change the submitter information saved in the portal, ONLY the information on that particular submission form.

To change submitter information: file & submit a VS form 4-10 (the NVSL "Request for contact information change" form) via mail or email to NVSL.Info@usda.gov - OR click the "Update Info Needed" radio button on select submission forms that have this option. When NVSL receives the submission form, they will see the "Update Info Needed" request on the packing slip, and this will prompt the official change of submitter info in the NVSL Database.

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5. Remove a delegate:

There are many reasons a submitter may need to remove a delegate, including staff changes. **Inactive delegates should be removed from the submitter account as soon as possible! Submitter accounts can only remove delegates from their <u>own</u> account.**

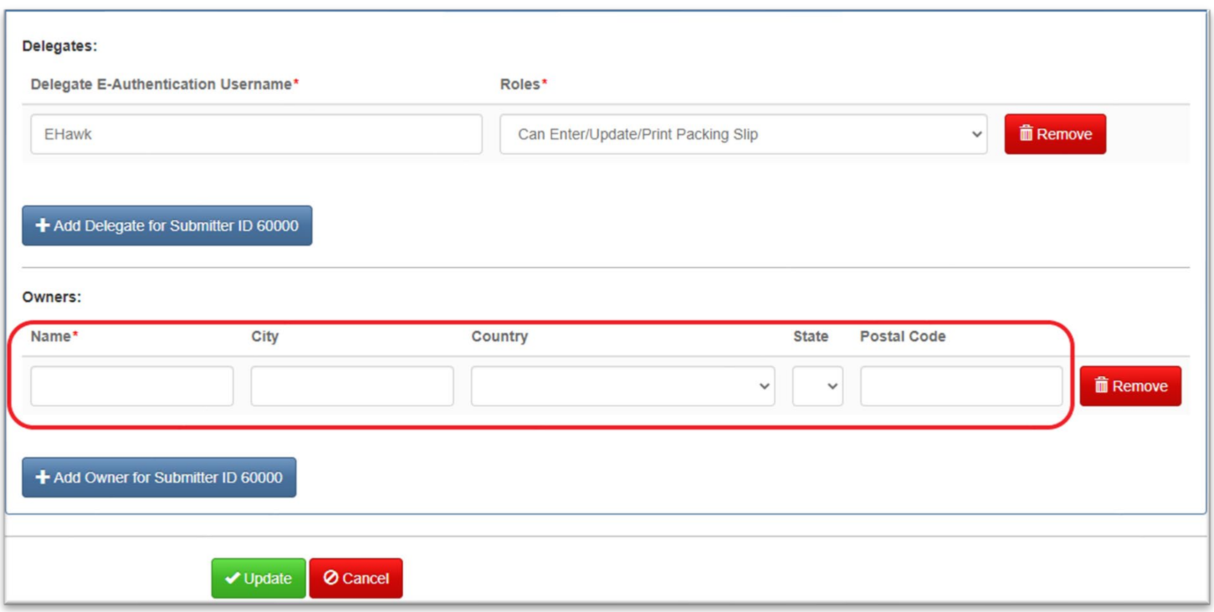
A. Navigate to the "Account Details" Page & select the "Edit Delegate/Owner Info" button

B. Click the red "Remove" button to delete the delegate you wish to delete.

1. Once a delegate has been deleted they will no longer be able to create submissions for that submitter, however deleted delegates can be added again at any time using their eAuthentication username.

6. Add/remove an Animal Owner:

A. Enter the first & last name of the owner (or name of farm/company if not an individual) into the "Name" field. The "Name" field is the only required field; fill in the remaining fields (City, Country, etc.) as desired.



B. Click the "Update" button to save the new owner.

I. To add additional owners, press the "+ Add Owner for Submitter ID" button. If you click too many times you can click on the "Cancel" button to remove unused entry lines.

****YOU & YOUR DELEGATES CAN NOW UTILIZE THIS INFORMATION TO SAVE TIME WHEN FILLING OUT SUMBISSION FORMS! See Below.****

C. To remove an owner, click the red "Remove" button.

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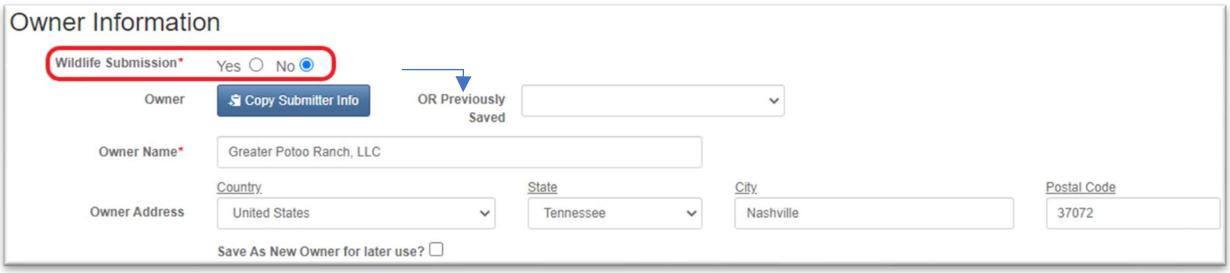
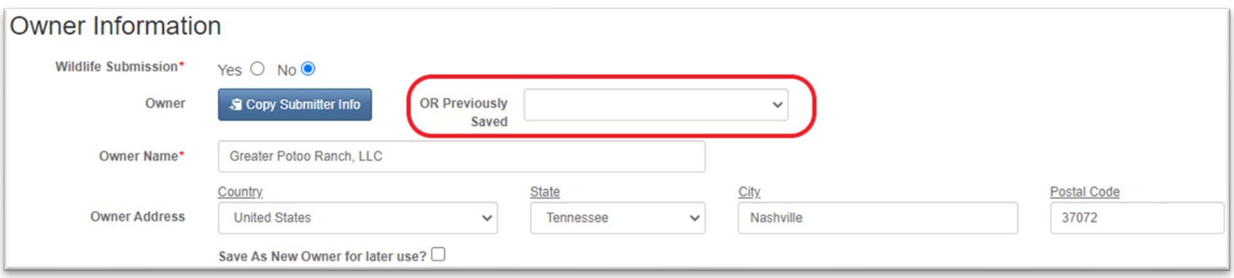
ACCOUNT DETAILS

7. Utilizing Owner info:

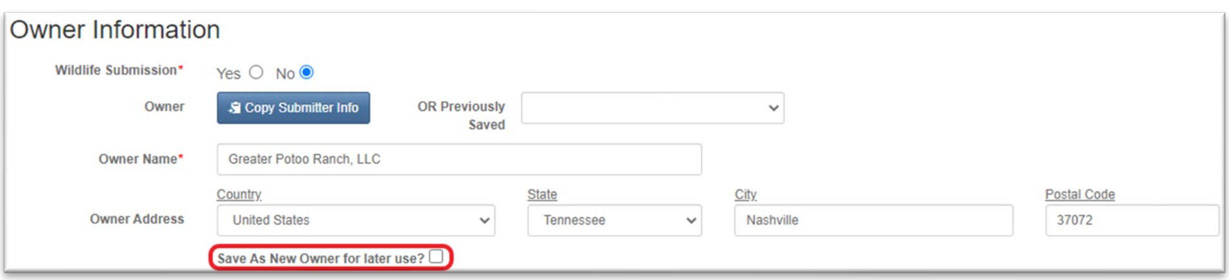
A. For owned animals: On the submission forms, under 'Owner Information', click "No" for the "Wildlife Submission". This opens the 'Owner Information' entry fields. Enter the animal owner's information in the appropriate fields.



B. If you previously saved owner information in the Submitter's account you can use the drop-down menu to choose an owner & it will auto-populate instead of requiring manual entry.



C. If the owner info has not been pre-entered & saved into the Submitter's account, it can be entered on the submission form & the "Save a New Owner for later use?" checkbox can be checked to save it for future use.



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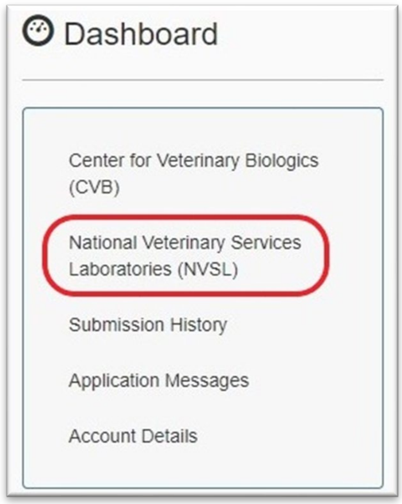
DIAGNOSTIC SAMPLE SUBMISSION FORM

Diagnostic Sample Submission Form

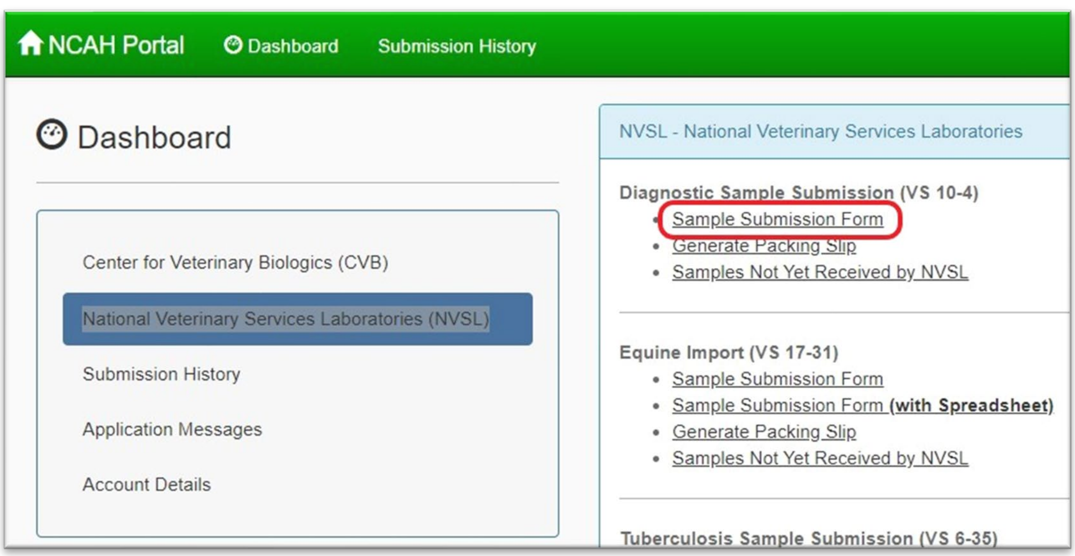
These instructions will show you how to access & fill out a Diagnostic Sample Submission Form. Forms are similar, the VS 10-4 is used as an example.

1. Accessing the Diagnostic Sample Submission Form

A. Once you are logged into the portal & on the dashboard select **"National Veterinary Services Laboratories (NVSL)"** from the left navigation menu.



B. Select **"Sample Submission Form"** under Diagnostics Sample Submission.



You will be directed the "Diagnostic Sample Submission Form VS 10-4"

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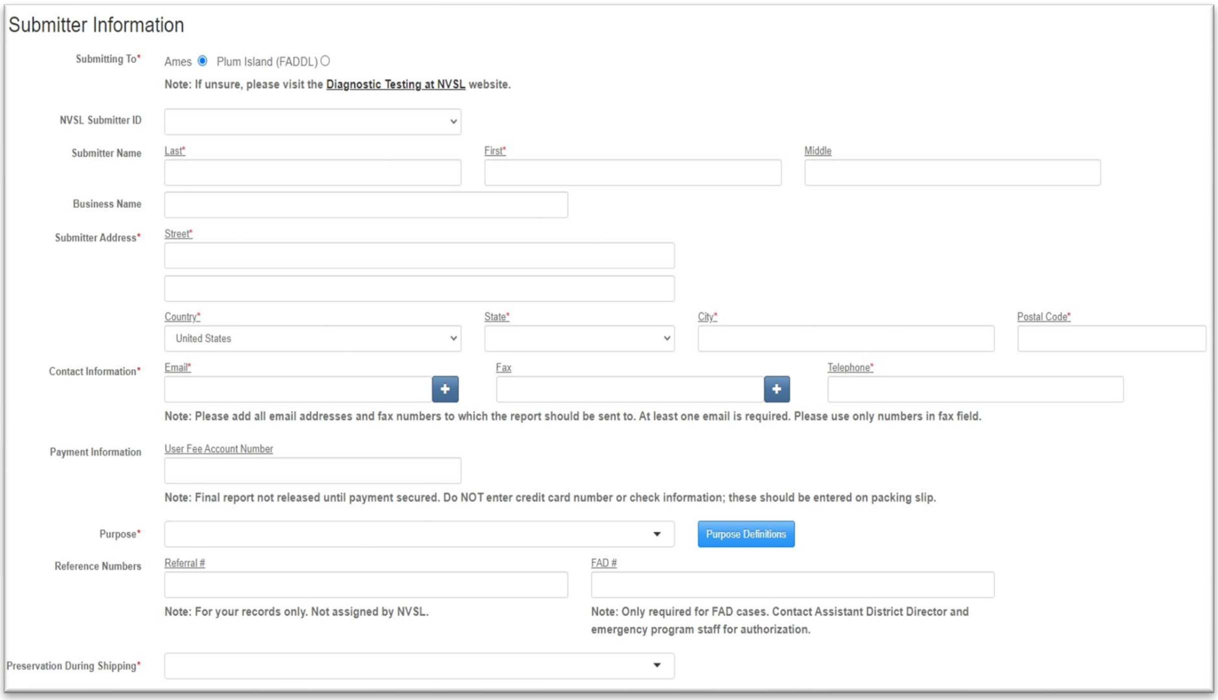
DIAGNOSTIC SAMPLE SUBMISSION FORM



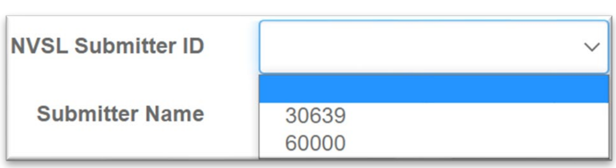
2. Submitter Information

***NOTE*:** Updating submitter information here will **NOT** change what is on file. Click **HERE** or click the "Update submitter information" radio button on the submission form to update submitter information.

A. Submitting To*: Select the appropriate radio button to send the submission to either Ames (NVSL) or Plum Island, NY (FADDL).

B. NVSL Submitter ID – Select Submitter ID from list – if using delegate account.

Note: This will auto-populate Submitter information into the designated fields for you! **Delegates should <u>NOT</u> enter their own information here, <u>nor should they change submitter information</u>.**



New submitters are assigned a Submitter ID once the submission is received by the NVSL or the FADDL. This process links your portal account to our LIMS system. After this process is complete you will be able to add delegates!

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DIAGNOSTIC SAMPLE SUBMISSION FORM

C. Submitter Name:

- **I. Last*** – Enter submitter's last name.
- **II. First*** – Enter submitter's first name.
- **III. Middle** – Enter submitter's middle name.

D. Business Name – Enter submitter's business name.

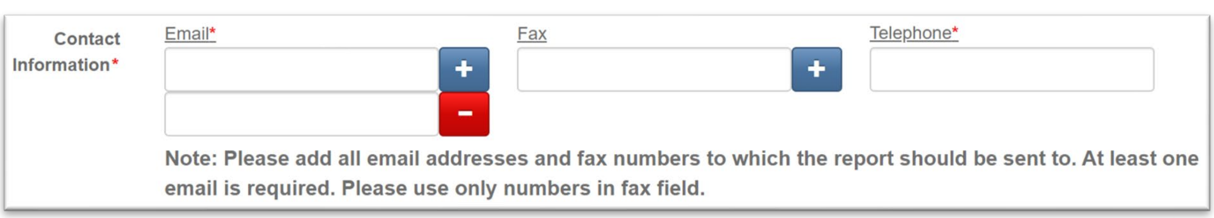
E. Submitter Address:

- **I. Street Address*** – Enter submitter's street address or PO Box.
- **II. Country*** – Select submitter's country from available list.
- **III. State*** – Select submitter's state from available list.
  Note: State field is only required if country is United States.
- **IV. City*** – Enter submitter's city.
- **V. Postal Code*** – Enter submitter's postal code.

F. Contact Information:

Note: To add an additional email/fax – Select the **BLUE PLUS** sign box.
Note: To remove an email/fax – Select the **RED MINUS** sign box.

- **I. Email*** – Enter email address.
  Note: A maximum of 10 emails may be entered. All emails listed will receive a report on the submission.
- **II. Fax** – Enter fax number.
  Note: A maximum of 10 fax numbers may be entered. All fax numbers listed will receive a report on the submission.
- **III. Telephone*** – Enter submitter's telephone number.



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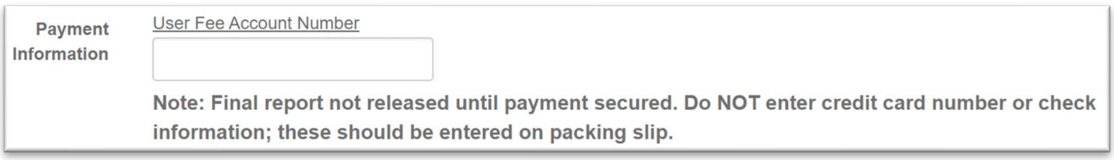
DIAGNOSTIC SAMPLE SUBMISSION FORM

G. Payment Information (User Fee Account Number) – Enter User Fee Account Number.

Note: **Your User Fee Account Number is NOT your submitter ID. The final report is not released until payment is secured**. Do **NOT** enter a card number here. Please do **NOT** send cash. Credit card information may be entered on the packing slip.



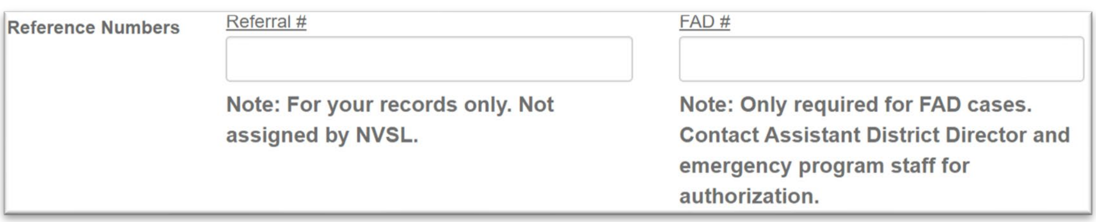
H. Submission Purpose* – Select purpose from available list.

Note: Select purpose definitions to get a description for each purpose.

I. Reference Numbers:

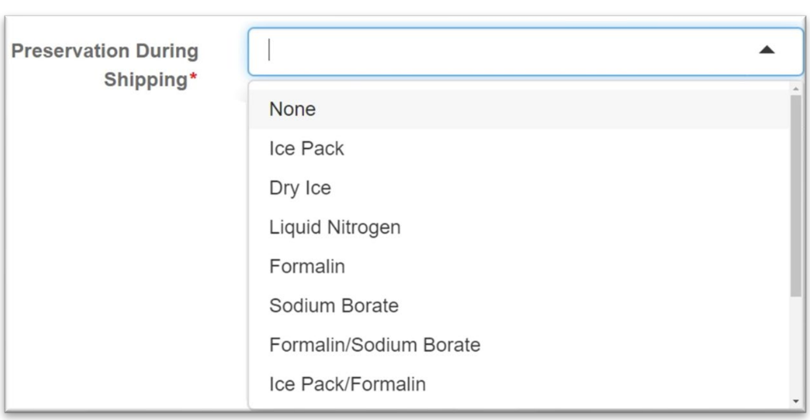
I. **Referral #** – Enter the referral number.
   Note: For your records only. Not assigned by the NVSL.

II. **FAD #*** – Enter the FAD number.
   Note: Only required for FAD cases. Contact Assistant District Director & emergency program staff for authorization.



J. Preservation during shipping* – Select preservation type from available list.

Note*: If preservation type is other, use the “Additional Submission Information” field to specify.



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3. Owner Information **(owner of the animal(s) sampled)**

   A. **Is Wildlife*** – Select Yes/No.
   Note: If "Yes," no owner information is needed. If "No," owner information is required.

I. **Owner** – Select "Copy Submitter Info" to populate the owner information section with the information filled out in the submitter information section.
II. **Owner Name*** – Enter owner's name.
III. **Owner Address**:
   a. **Country** – Select owner's country from available list.
   b. **State** – Select owner's state from available list.
   c. **City** – Enter owner's city.
   d. **Postal Code** – Enter owner's postal code.
IV. **Save As New Owner for later use?** – Select this checkbox to save the entered animal owner information for future submissions.

4. **Animal Information**

   A. **Premises ID** – Enter premises ID.
   Note: Only required for FAD cases/National Animal Identification System (NAIS), but it is recommended that you include the Premises ID on all submissions if known.

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B. Address – Enter the address where the animal was sampled

I. **Country*** – Select animal country from available list.

Note: If United States is selected, county & state fields will appear & are required.

II. **State*** – Select the State

III. **County*** – Select the County

C. Herd/Flock:

I. Number of Animals – Enter total number of animals.

II. Number Affected – Enter total number of animals affected.

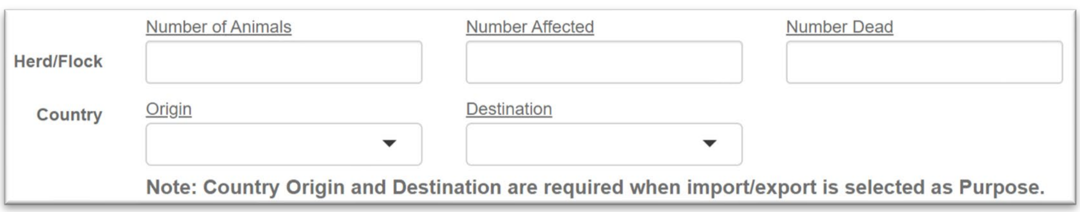
III. Number Dead – Enter total number of animals dead.

D. Country:

I. Origin – Enter animals' country of origin.

II. Destination – Enter animals destination country.

Note: Country of origin & destination are required when **import/export** is selected as purpose.



5. Specimen Information

A. Total Number Of:

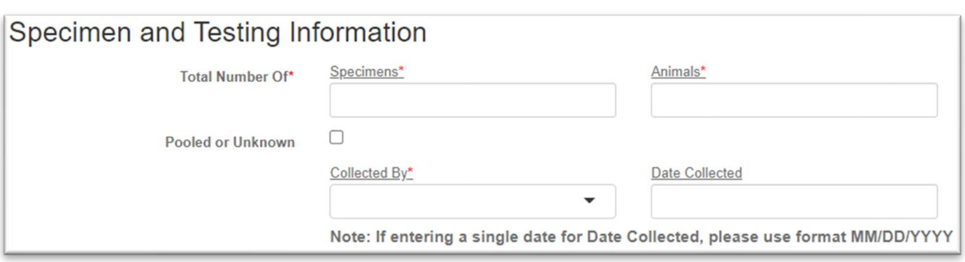
I. Specimen(s)* – Enter total number of specimens.

II. Animal(s)* – Enter total number of animals sampled.

III. Pooled or Unknown – Select the checkbox if the samples have been pooled or are of an unknown source.

IV. Date(s) Collected* – Enter date collected.

Note: **The Collection date(s) is required for all NVSL submissions**. If you have multiple collection dates, please add each date to the end of the "animal ID" for each animal or type them in the "addition specimen information" field.



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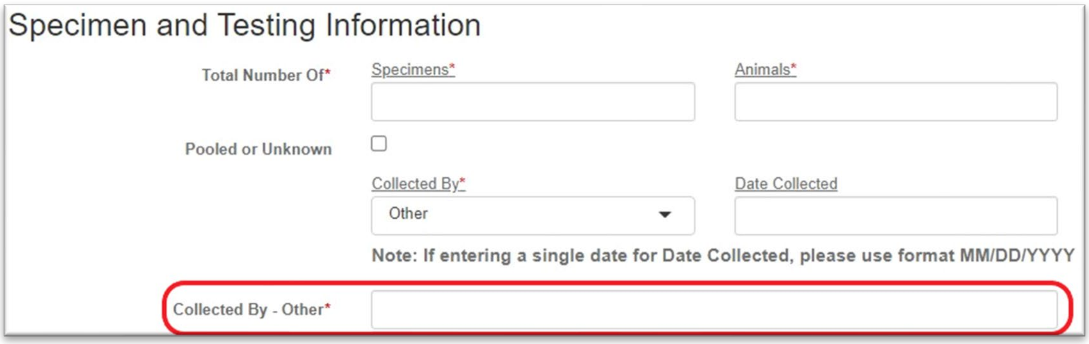
V. **Collected By*** – Select collected by from available list.

Note: If you select “Other” in the “Collected By” dropdown menu, the “Collected by – Other*” field will appear & is **required**.



B. Specimen:

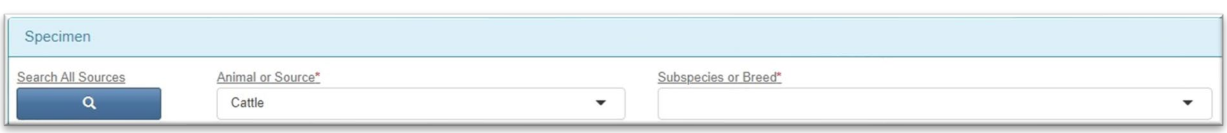
I. **Search All Sources** – Select the magnifying glass to search for an animal/breed which will auto-populate the “Animal or Source” & “Subspecies Breed” for you.

II. **Animal or Source*** – Select animal or source from available list (if not auto-populated for you from searching in the previous step). A “Subspecies or Breed” field will appear if the animal subspecies is required.

Note: If animal or source is “Other – please specify” the “Subspecies or Breed” field will appear. If your animal/source is or not listed in the “Subspecies or Breed” drop-down menu, choose “Other,” & specify the source in the “Additional Specimen Information” field.

III. **Subspecies or Breed*** – Select subspecies or breed from available list if not auto-populated for you from searching in step I.

Note: If subspecies or breed is “Other” or not listed, please specify in the “Additional Specimen Information” field.



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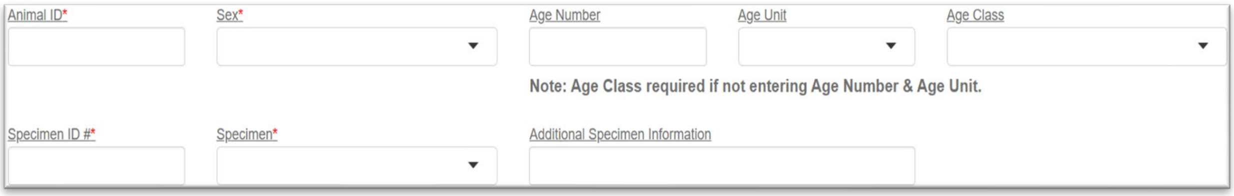
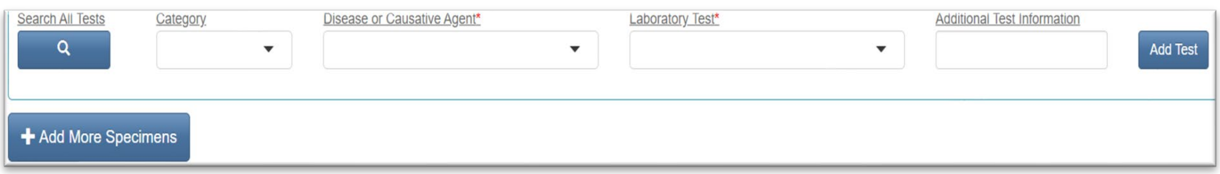
DIAGNOSTIC SAMPLE SUBMISSION FORM



IV. **Animal ID*** – Enter animal ID.
V. **Gender*** – Select gender from available list.
VI. **Age Number** – Enter age number.
VII. **Age Unit** – Select age unit from available list.
  Note: Age number & age unit are required if <u>not</u> entering age class.
VIII. **Age class** – Select age class from available list.
  Note: Age class is required if <u>not</u> entering age number & age unit.
IX. **Specimen ID*** – Enter specimen ID.
X. **Specimen*** – Select specimen type from available list.
XI. **Additional Specimen Information** – Enter additional information pertaining to the specimen here. Examples: Multiple collection dates, clinical signs if ill. Any information that could be pertinent to the specimen.

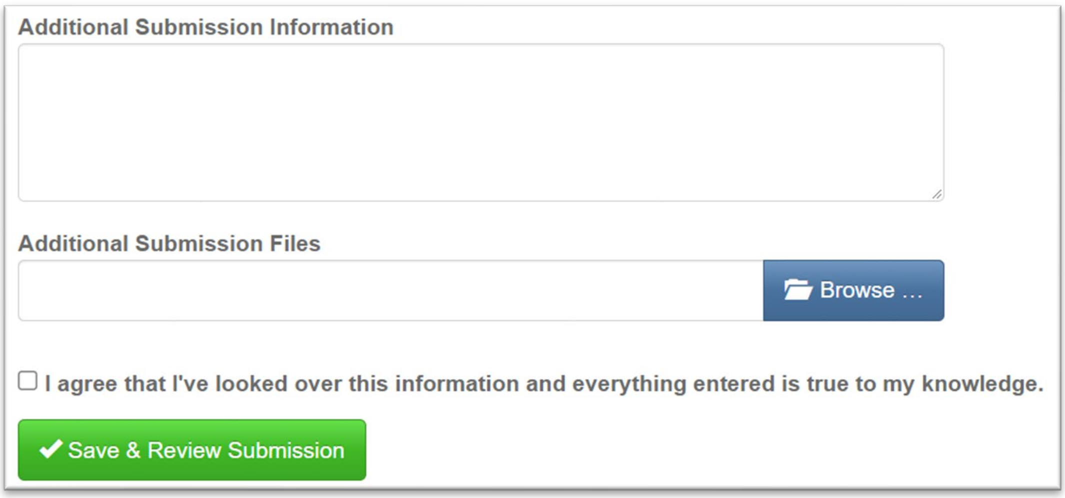


XII. **Search** – Select the magnifying glass to search for a specific disease category/disease or causative agent/& or laboratory test which will auto-populate the disease category, disease, or causative agent & laboratory test fields for you.
XIII. **Category** – Select category from available list if not auto-populated for you from step XII.
XIV. **Disease or Causative Agent*** – Select disease or causative agent from available list if not auto-populated for you from step XII.
XV. **Laboratory Test*** – Select the desired laboratory test from available list if not auto-populated for you from step XII.
XVI. **Additional Test Information** – Enter any additional information pertaining to the tests here.
XVII. **Add Test** – Select to add additional tests.
  Note: There is no limit to how many tests you can add.
XVIII. **Add More Specimens** – Select to add additional specimens.
  Note: You can add up to 100 specimens per VS 10-4 & VS 17-31 forms, but only 10 specimens per a VS 10-3 form.

[Return to Main Menu]

6. Save & Review Submission

- **A. Additional Submission Information** – Enter any other information pertaining to this submission here.
- **B. Agreement*** – Please review the information you have entered & check for accuracy & completeness. Select the checkbox once complete.
- **C. Save & Review Submission*** – Select this once the form is complete & ready for submission.



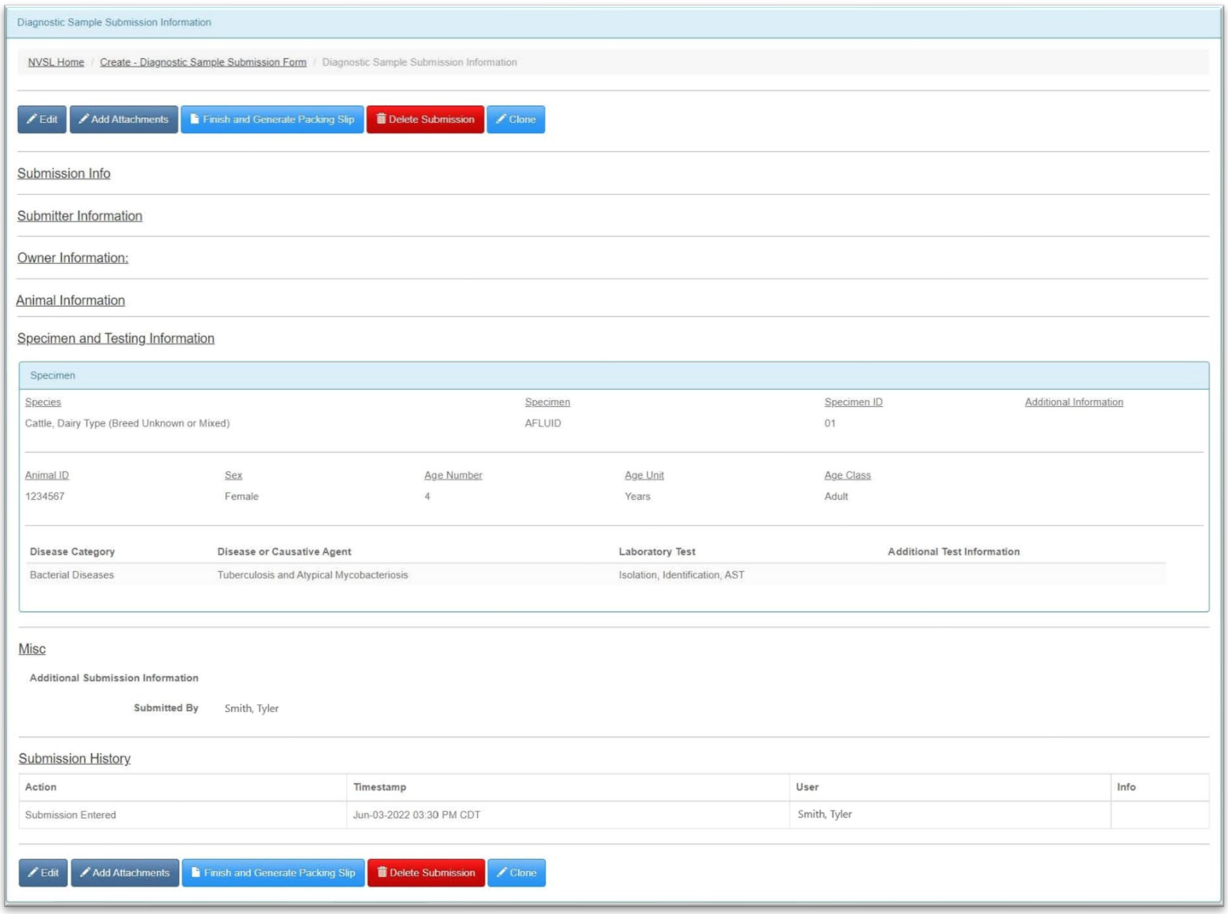
Submission Form Complete!

You will be directed to the Submission Review page.

Return to Main Menu

REVIEW SUBMISSION INFORMATION

Submission Review Page



Note: The above picture is an example of the page. For authentic submissions, information from the previous page will be populated in the designated fields.

1. Edit Submissions

IMPORTANT Submissions are only available for editing **up to 14 days after completion** or **upon receipt** of samples by the NVSL. If after 14 days no samples have been received by the NVSL, the submission will be automatically **REMOVED** by the portal system & you will have to start a new submission.

A. Edit – Select one of the "Edit" buttons found at the top & bottom of this page to edit the submission.

You will be directed back the submission page to make the desired changes you wish. **Note**: All form rules still apply when editing a submission. To review how to fill out a submission form click **HERE**.

Return to Main Menu

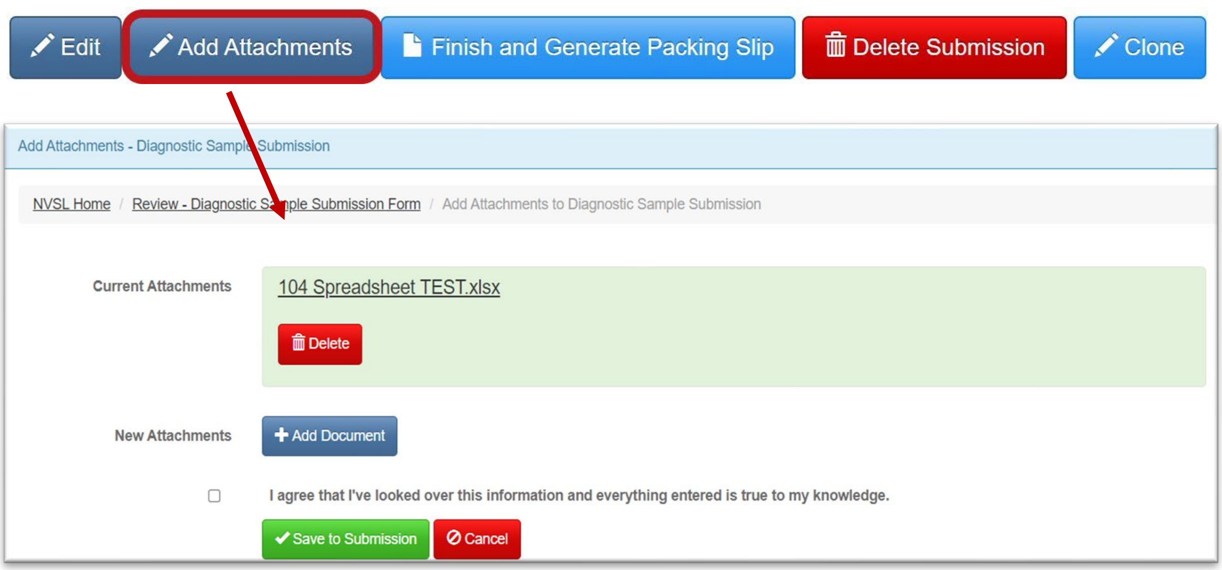
REVIEW SUBMISSION INFORMATION

I. **Save & Review Submission/Cancel:**
   a. **Save & Review Submission** – Click the check box and select "Save & Review Submission" to save your changes.
   b. **Cancel** – Select "Cancel" to abandon any edits made.

2. Attachments

A. View/Remove/Add Attachments

I. Select one of the "**Add Attachment**" buttons located at the top & bottom of this page to be taken to the remove/view/add attachments page for this submission.



****IMPORTANT**:** 35MB is the largest attachment file size that may be submitted via Portal. If submitting attachments larger than 35MB, assistance from the NVSL is required.

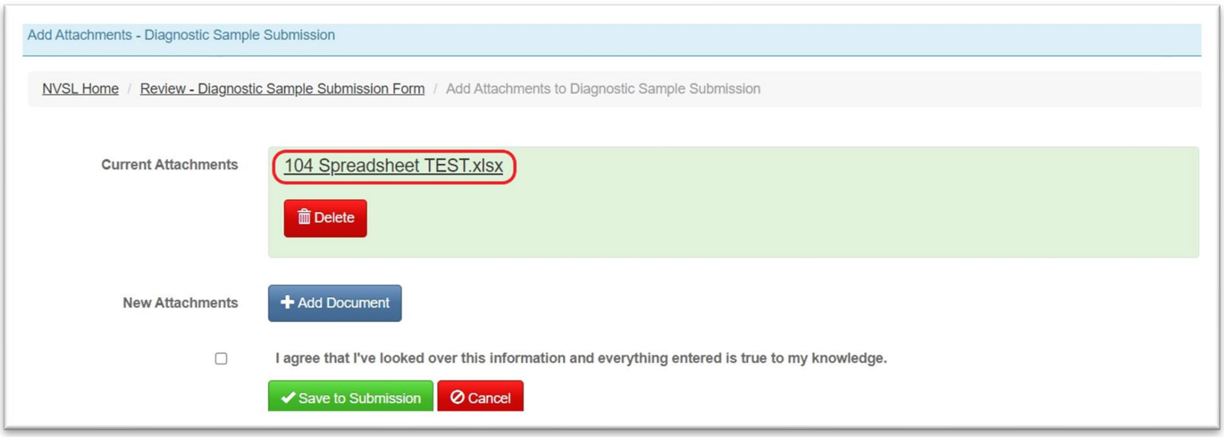
Accepted file types: CSV, DPF, DOC, DOCX, FODS, FODT, GIF, JPG, LOG, MDB, ODF, ODS, ODT, PDF, PNG, RTF, TIF, TIFF, TXT, XML, XLS, XLSX.

Return to Main Menu

REVIEW SUBMISSION INFORMATION

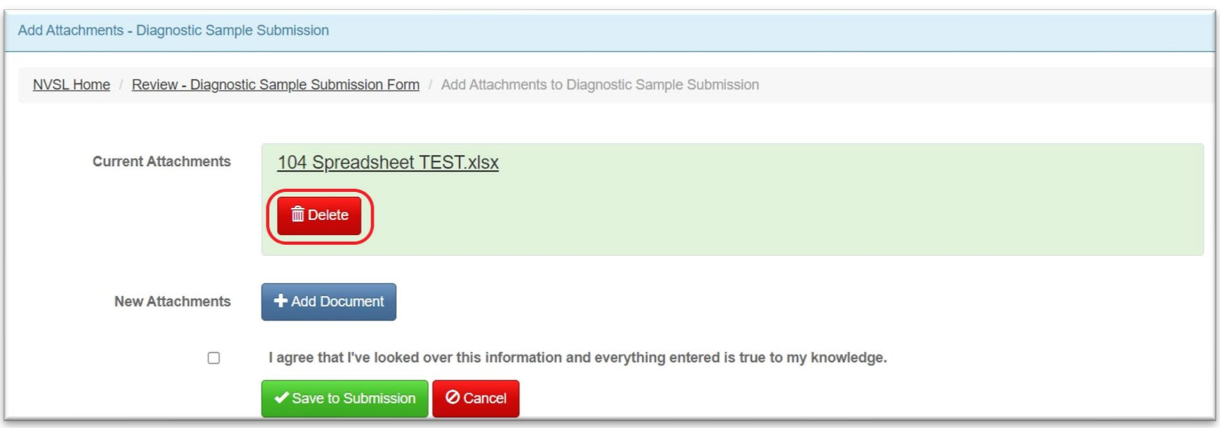
B. View Attachments

I. In the current attachment section, select the **attachment's name** to download & view.



C. Remove Attachments

I. In the current attachment section, select "**Delete**" on the attachment you wish to remove.



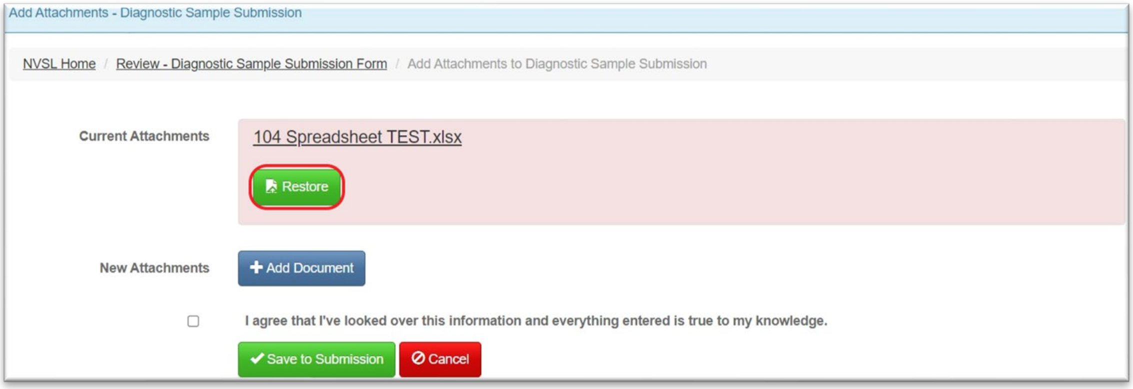
II. **Agree to terms** – Select checkbox after to confirm the changes you have made.
III. **Save to Submission** – Select save to submission to complete the file removal.

Return to Main Menu

REVIEW SUBMISSION INFORMATION

D. Restore Attachments

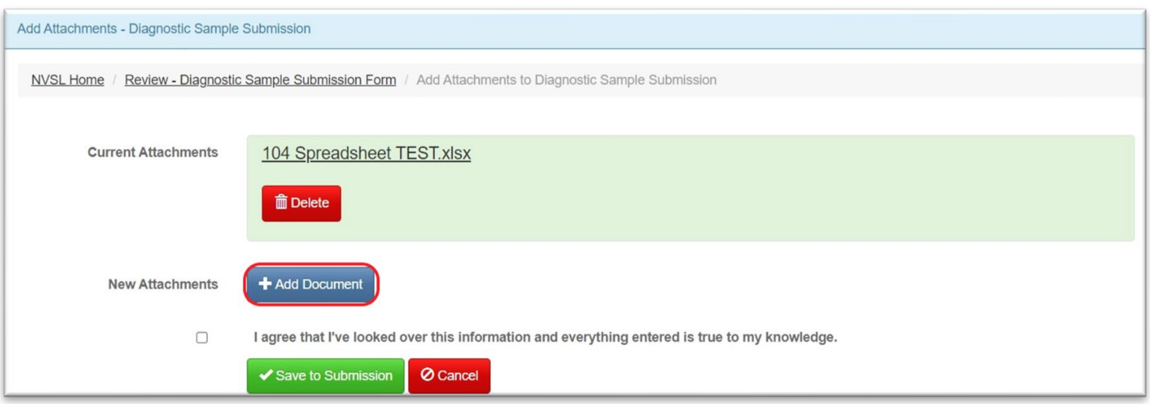
I. Select "**Restore**" to undo file deletion.



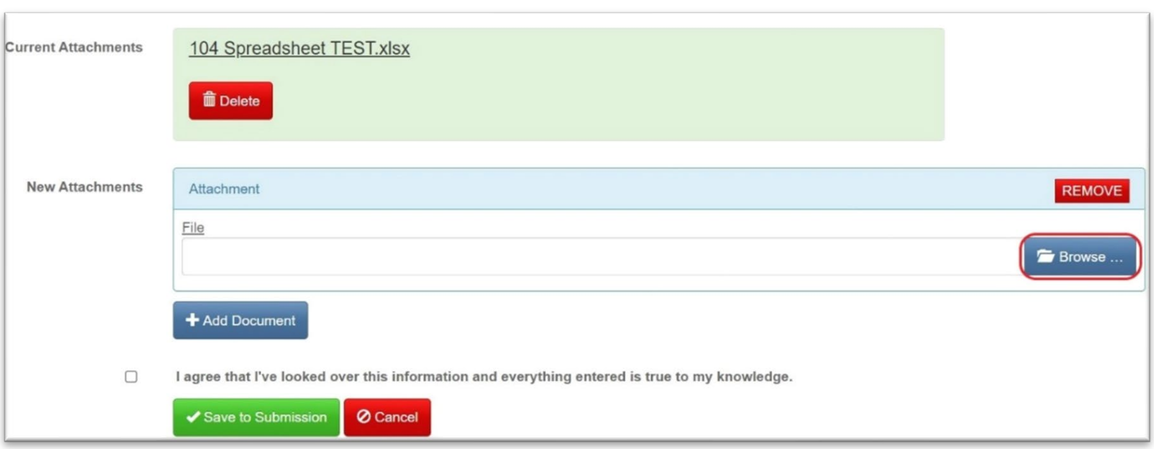
II. **Agree to terms** – Select checkbox after to confirm the changes you have made.
III. **Save to Submission** – Select save to submission to complete the file restoration.

E. Add Additional attachments

I. In the current attachment section, select "**Add Document**" to add additional documentation.



II. **File** – Select browse to search your computer for a file to attach.



[Return to Main Menu]

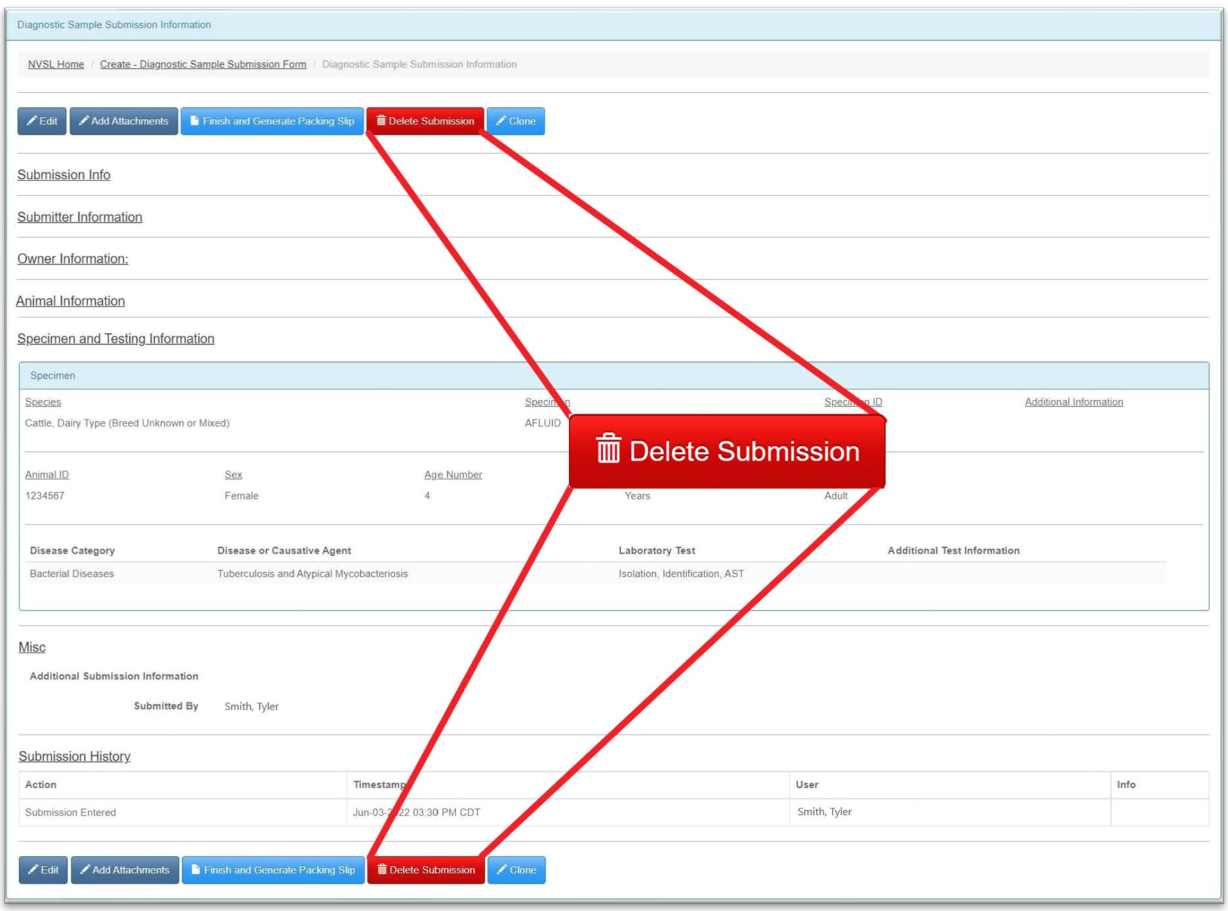
REVIEW SUBMISSION INFORMATION

III. **Agree to terms** – Select checkbox after review to confirm the changes you have made.

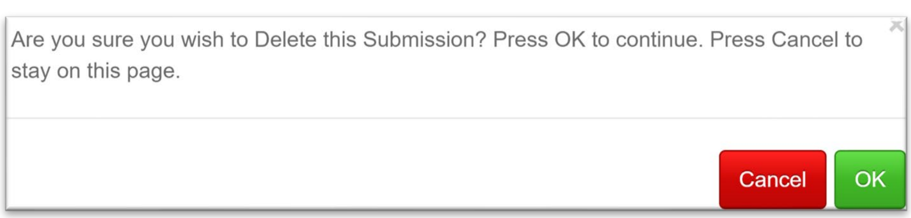
IV. **Save to Submission** – Select save to submission to complete the file upload & return to the Submission Review Page

3. Delete Submission

A. Select one of the "**Delete Submission**" buttons located at the top & bottom of this page to remove the submission.



B. Select "**OK**" to confirm the deletion of the request.

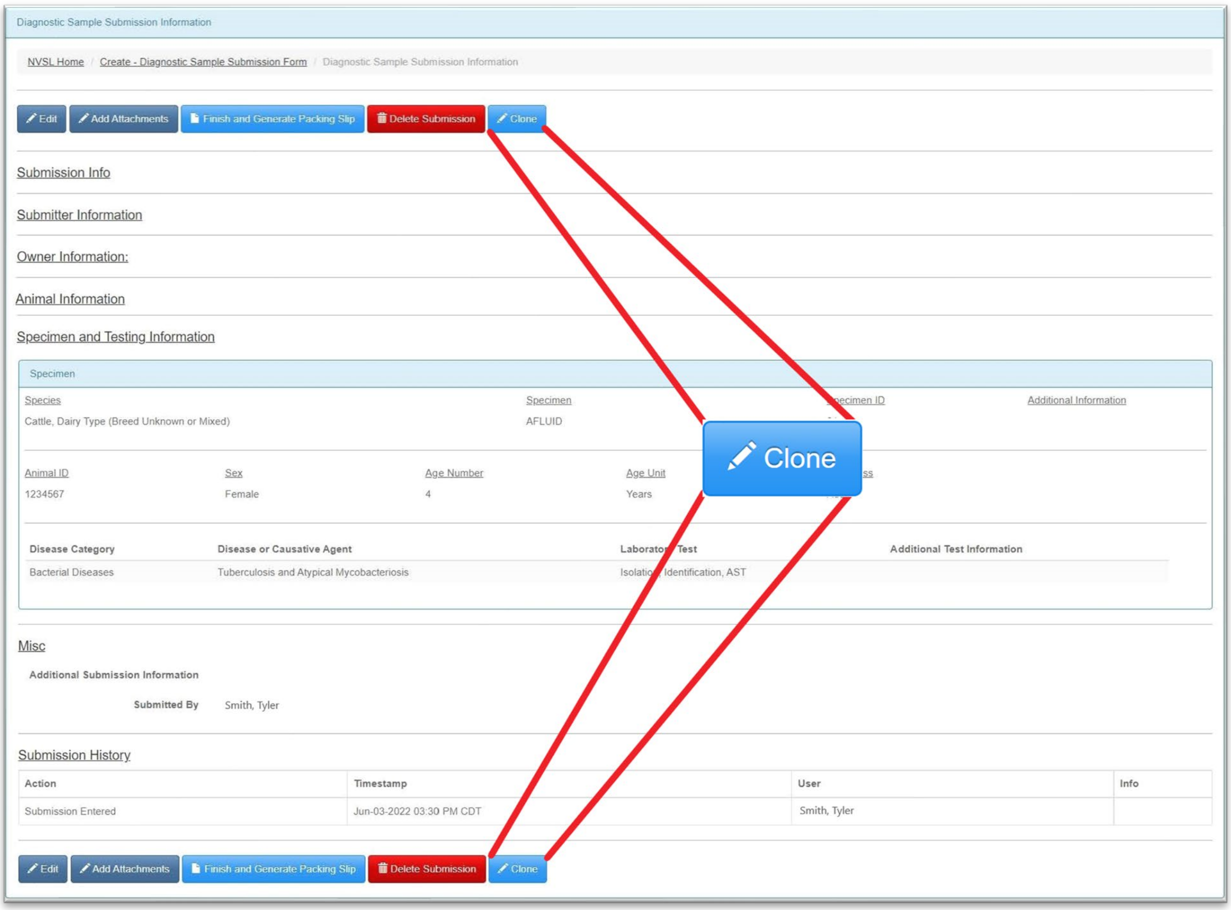


Return to Main Menu

REVIEW SUBMISSION INFORMATION

4. Clone Submission

A. Select one of the "**Clone**" buttons at the top & bottom of this page to duplicate the submission. This will create a copy of the submission & auto-populate its information on a new submission for you excluding the date collected & specimen ID fields.



[Return to Main Menu]

DIAGNOSTIC SAMPLE SUBMISSION FORM: GENERATING THE PACKING SLIP

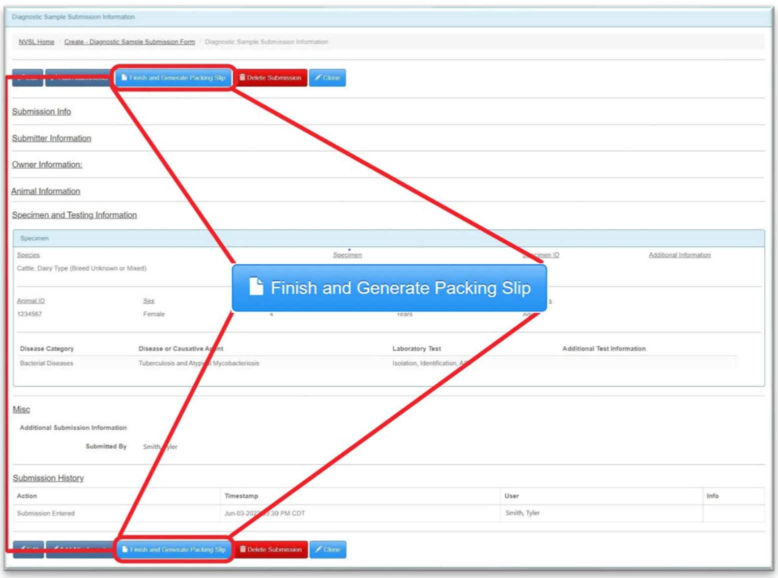
Generating The Packing Slip

There are two ways to generate a packing slip:

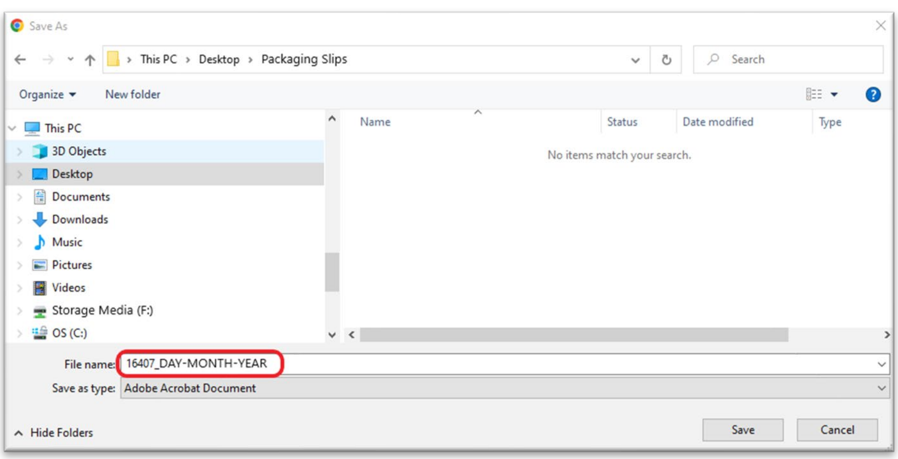
1. Generating the packing slip on the review page directly after filling out the submission form.
2. Accessing the Diagnostics Sample Submission Generate Packing Slip Page and selecting the submission you wish to generate a packing slip for.

1. Finish & Generate Packing Slip from submission form review page.

A. Select one of the "**Finish & Generate Packing Slip**" buttons located at the top & bottom of this page to create a printable packing slip of the submission.



Your packing slip will open <u>OR</u> you will be prompted to save your packing slip.



[Return to Main Menu](#)

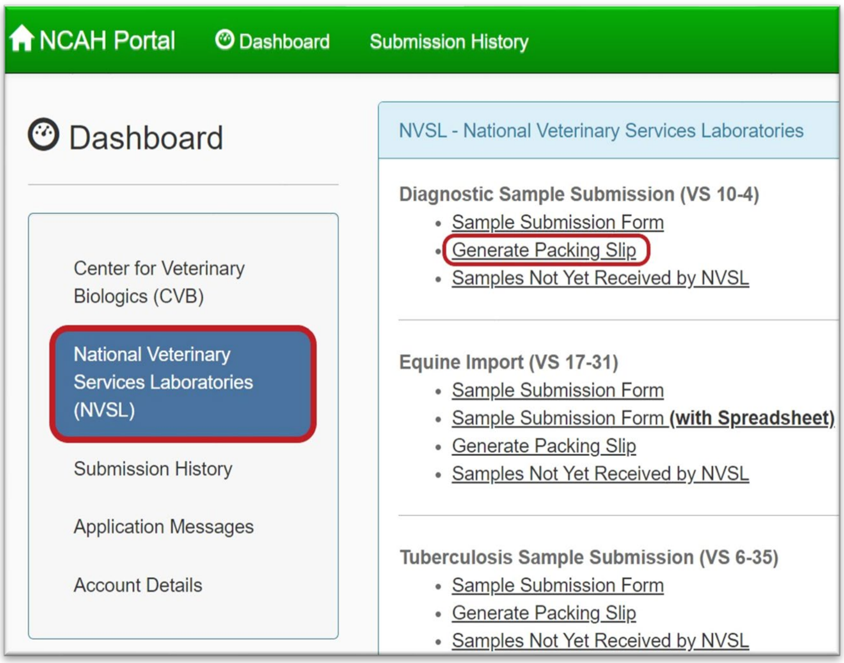
DIAGNOSTIC SAMPLE SUBMISSION FORM: GENERATING THE PACKING SLIP

2. Accessing the Diagnostics Sample Submission Generate Packing Slip Page: Example VS 10-4

The "Generate Packing Slip" page contains a list of packing slips that **have not been generated (printed) yet.** Once a packing slip is generated the submission will be moved to the "Processed Samples" page where you can reprint if needed.

A. Once logged into the Portal select "**National Veterinary Services Laboratories (NVSL)**".

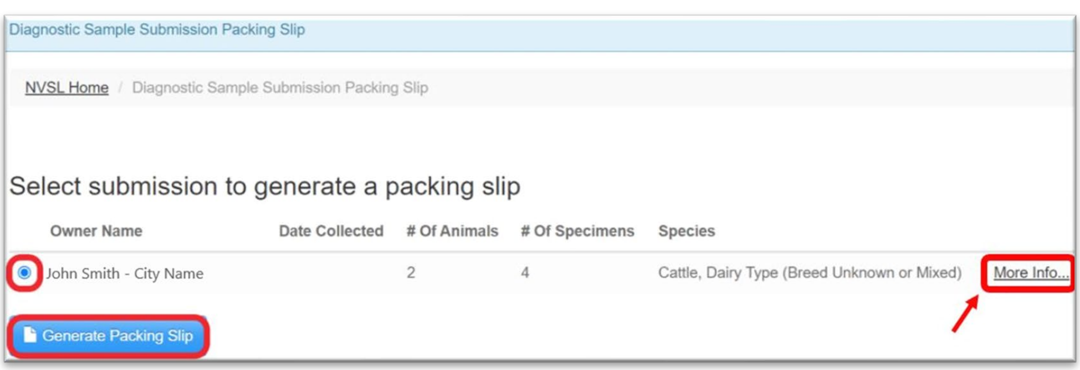
B. Select "Generate Packing Slip" under Diagnostics Sample Submission (VS 10-4).



3. Generating the Packing Slip

A. Select the radio button on the desired submission you would like to generate a packing slip for. Note: Select the "More Info" hyperlink to view/edit the submission details.

B. Select "Generate Packing Slip" to create a pdf packing slip document of the selected submission.



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DIAGNOSTIC SAMPLE SUBMISSION FORM: GENERATING THE PACKING SLIP

##/##/#### - FOR OFFICIAL USE ONLY

National Veterinary Services Laboratories
VS 10-4 - Diagnostic Sample Submission Packing Slip

#####

AMES
1920 Dayton Ave
Ames, IA 50010

User Fee Account Number:			
Credit Card Number/Check Number:		**Exp Date:**	

Submitter
Submitter ID: # # # # #
LAST, FIRST
Your Company Here
Company Street Address
City, State Zip Code Country
eAuth Username: Your.Auth.Username
eAuth Name: Your eAuth Name

Contact Info
PH: 5555555555
FAX: 5555555555
EMAIL:
youremail@yourcompany.com

Owner
Animal Owner's Name
Animal Owners Address
City, State, Zip, Country

Location Of Animals
City, State, Zip, Country

Exams
Test(s) you have requested

Purpose
Your Purpose fro requesting testing

Preservation
Preservation method in packaging box

Origin/Destination
State or country of animal's origin

Collected
By: Collector 's First, Last name or title
Date: Date sample was collected

Herd/Flock
Size: #
Affected: #
Dead: #

Total
Specimens: #
Animals: #

Submitted
By: Submitter's Frist & Last name
eAuth Username: Your.Auth.Username
eAuth Email: submitteremail@yourcompany.com
Date: ##/##/####

Attachments
FormSampleSpreadsheet.xlsx

Additional Data

Specimen ID	Specimen	Animal ID	Species/Breed	Sex	Age
#######	Description	#########	Species & breed from form	Sex of animal(s)	Age # & unit OR age class

Tests:
Requested testing description

4. Payment Information

A. If submitting payment along with the packing slip please enter the credit card number & expiration date in the blue boxes above. If you are submitting as part of a government appropriated program leave them blank. ****Do NOT send cash****

5. Print the packing slip

A. Print the packing slip and review the packing slip to ensure accuracy.
B. Place the packing slip in the shipping box, **outside the leak proof container** holding the specimens. The packing slip MUST be included in the submission box.

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DIAGNOSTIC SAMPLE SUBMISSION FORM: SHIPPING GUIDELINES

Shipping Guidelines

1. Shipping Guidelines/Information

A. General Considerations for Sample Submissions:

- **I.** Samples must be shipped in compliance with 49 CFR & IATA regulations.
- **II.** All relevant persons involved must have training to carry out their responsibilities.
- **III.** Samples (Specimens) include, but are not limited to: excreta, secreta, blood & its components, tissue & tissue fluids, organs, animal parts, & cultures.
- **IV.** **ALL** liquids or liquid containing samples should be packaged in leak proof containers with adequate absorbent material.
- **V.** Pre-label sample containers to ensure all recommended specimens will be collected.
- **VI.** Each vessel containing a sample should be **individually labeled & arranged in numerical order starting with 1, 2, 3…** Animal identification numbers or names may be written on tubes in addition to numerical numbers but should not be used as the only means of tube identification.
- **VII.** For serological testing, submit one tube containing 2ml of clear serum per animal for each test requested.
- **VIII.** Fresh specimens: Refrigerate tissues using pre-frozen ice packs if samples will reach the laboratory within 24 hours.
- **IX.** If tissues or swabs are to be in transit more than 48 hours, use dry ice unless agents should not be frozen. Note that CO2 gas can inactivate some viruses & prohibit isolation. Do not freeze or use dry ice in boxes that contain formalized tissues.
- **X.** Pack fresh & formalin-fixed samples separately.
- **XI.** Formalin-fixed tissues should be packaged in leak proof containers with adequate absorbent material. Formalin-fixed specimens may be shipped in the jars containing the 10% formalin solution. Alternatively, the tissue may be removed from the liquid & placed in a leak-proof bag with a formalin-soaked cotton ball, provided that the tissues remained in the 10% formalin for at least 3 hours.
- **XII.** All samples should be packaged & shipped in a leak proof container along with absorbent material sufficient to absorb leaking or broken containers.
- **XIII.** Appropriate types of packaging should be utilized & sufficient absorbent materials to contain the contents of the package **must** be included.
- **XIV.** **For more details on shipping to NVSL see our Shipping Guidelines webpage**.

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DIAGNOSTIC SAMPLE SUBMISSION FORM: SHIPPING GUIDELINES

B. Quick Overview of What You Need to Know for Shipping Specimens

I. <u>Training requirements: The law requires all involved in the packaging & shipping of infectious substances to have the proper training on a regular basis.</u>

a. **Category A:** Specific **<u>formal</u>** training & documentation of completed training is required for all staff who package or transport items in this category.
b. **Category B:** Documented training is required for all staff who package or transport items in this category. Staff who ship waste cultures or stock of a Category B infectious substance **<u>must be hazmat trained</u>**. Otherwise, those who ship Category B infectious substances such as samples for routine testing must be trained on the information & compliant packaging techniques presented in **49 CFR 173.199**. Even if training is informal & in-house, **<u>it must be documented</u>**.
c. Most clients package & ship Category B items on a routine basis. If the individuals who package these items have not had the required training, it is imperative that they receive it immediately & that the training is **documented**. Remember any clients shipping Category A items will need to have the responsible staff **formally** trained on the subject.
d. **Each client is responsible for maintaining the training record for <u>at least 3 years</u>** for each employee trained to package these substances, & for 90 days beyond the duration of employment.
e. Training records <u>must</u> be made available to regulatory authorities upon request.
f. The Department of Transportation (DOT) / Pipeline and Hazardous Materials Safety Administration's (PHMSA) website for FAQs – Hazmat Training FAQs.
g. The DOT/PHMSA website & publication, What You Should Know: A Guide to Developing a Hazardous Materials Training Program, provides valuable information & resources including sample training records.

II. <u>The classification of the sample being shipped determines the packaging & training requirements which are applicable.</u>

a. **Category A**: "*An infectious substance in a form capable of causing permanent disability or life-threatening or fatal disease in otherwise healthy humans or animals when exposure to it occurs*." [49CFR §173.134 Class 6, Division 6.2(a)(1)(i)]. Examples of <u>Category A</u> infectious substances include <u>but are not limited to</u> confirmed cultures of organisms such as Bacillus anthracis, Brucella abortus, Chlamydia psittaci or Eastern Equine Encephalitis Virus.
b. **Category B:** "*An infectious substance that is not in a form generally capable of causing permanent disability or life-threatening or fatal disease in otherwise healthy humans or animals when exposure to it occurs. This includes Category B infectious substances transported for diagnostic or investigational purposes*."

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[49CFR § 173.134 Class 6, Division 6.2(a)(1)(ii)]. Examples of Category B infectious substances are samples that are suspicious for organisms including but not limited to Leptospira or suspected but not confirmed cases of Category A infectious substances.

c. **Exempt:** 49CFR § 173.134 Class 6, Division 6.2(b) provides multiple specific examples of materials & samples that are exemptions to the shipping regulations of Categories A & B. An exempt material is one "*that does not contain an infectious substance or that is unlikely to cause disease in humans or animals*." This includes:
   1. Samples collected for "*routine testing not related to the diagnosis of an infectious disease, such as...*"blood chemistries" ...*or ... for diagnosis of non-infectious diseases, such as cancer biopsies, & for which there is a low probability the sample is infectious*."
   2. Samples, other than Category A materials, transported by private or contract carrier in a motor vehicle used exclusively for these materials.

d. Pages 6-17 of the DOT/PHMSA guide, Transporting Infectious Substances Safely, provides further discussion of the categories & helpful diagrams of how to decide if you are shipping Category A, B, or exempt materials.

III. General packaging guidelines (not meant to be complete) for each category.

a. **Category A**: Watertight primary container for the specimen, absorbent material, watertight secondary container with list of contents on the outside, United Nations (UN) rated rigid outer container with proper UN labeling.

b. **Category B**: Leak proof primary container with the specimen, absorbent material & leak proof secondary packaging like a sealed plastic bag, rigid outer package with proper markings. Cushioning material should be added as needed. It is no longer proper to use the terms "*Diagnostic Specimen*" or "*Clinical Specimen*" to label the package.

c. **Exempt**: Leak proof primary container with the specimen, absorbent material & leak-proof secondary packaging like a sealed plastic bag, rigid outer package marked "*Exempt animal specimen*." **Do not use biohazard symbols or bags.**

d. In all cases, fragile primary sample packaging (tubes, slides, vials, etc.) must be wrapped or separated to prevent breakage.

e. Always ask the receiving lab how best to package the sample, or if it can supply the proper packaging materials to be used. When in doubt, package as the more stringent conditions require.

f. The DOT/PHMSA guide, Transporting Infectious Substances Safely, has additional packaging information on pages 27-34, with helpful diagrams on pages 28-31.

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DIAGNOSTIC SAMPLE SUBMISSION FORM: SAMPLES NOT YET RECEIVED BY NVSL

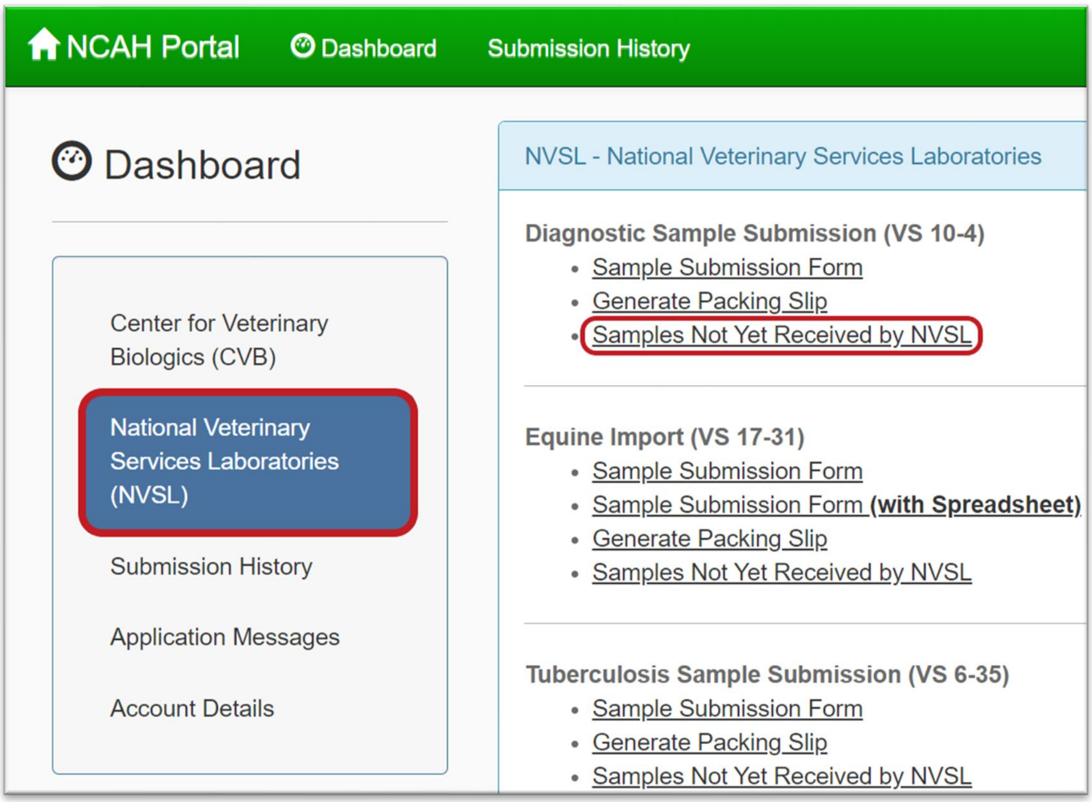
Samples Not Yet Received by NVSL

NOTE: The "Processed Samples" page has a list of packing slips that have been previously generated. **However, they have not been processed (received) by the NVSL.**

1. Accessing the Diagnostic Sample Submission, Processed Samples Page

A. Once logged into the portal select "**National Veterinary Services Laboratories (NVSL)**" from the dashboard.

B. Under Diagnostics Sample Submission (VS 10-4) select "**Samples Not Yet Received by NVSL**"



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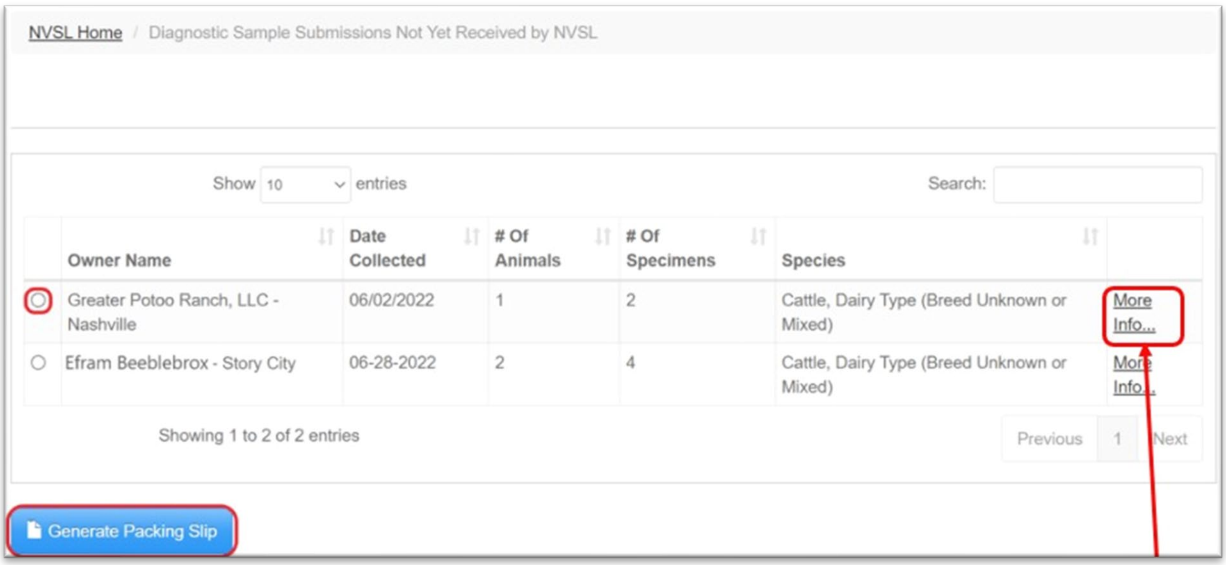
DIAGNOSTIC SAMPLE SUBMISSION FORM: SAMPLES NOT YET RECEIVED BY NVSL

2. Retrieving a Previously Generated Packing Slip

A. Select the radio button on the desired submission you would like to retrieve a packing slip for. **Note**: Select the "More Info" hyperlink to view/edit the submission details.

B. Select "Generate Packing Slip" to retrieve the pdf packing slip document for the selected submission.



3. Payment information & printing the packing slip

A. Please CLICK HERE to review how to enter payment information & print the packing slip. Note: Shipping guidelines/information follows this section.

4. Shipping Guidelines/Information

A. Please CLICK HERE if you only need to review shipping guidelines/information.

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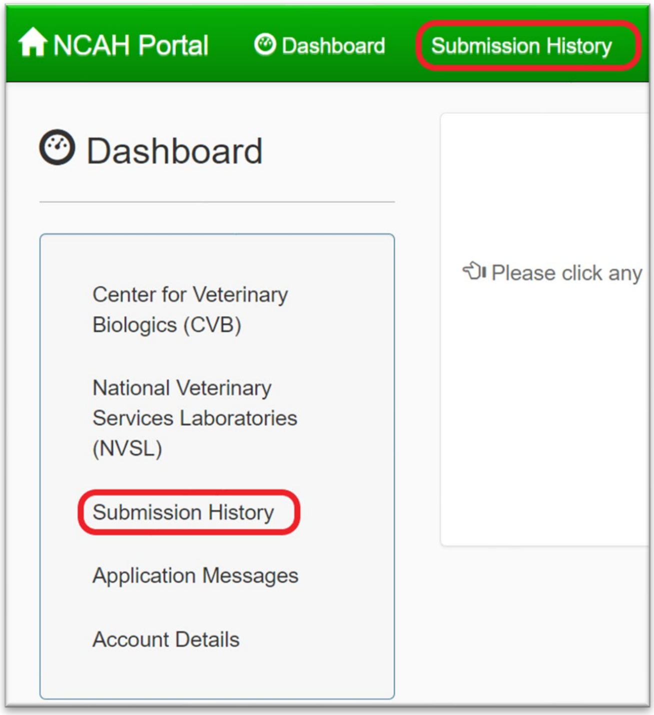
DIAGNOSTIC SAMPLE SUBMISSION FORM: SUBMISSION HISTORY

Submission History

1. Accessing the Submission History Page

A. Select **"Submission History"** from either the top or left navigation bar**.**



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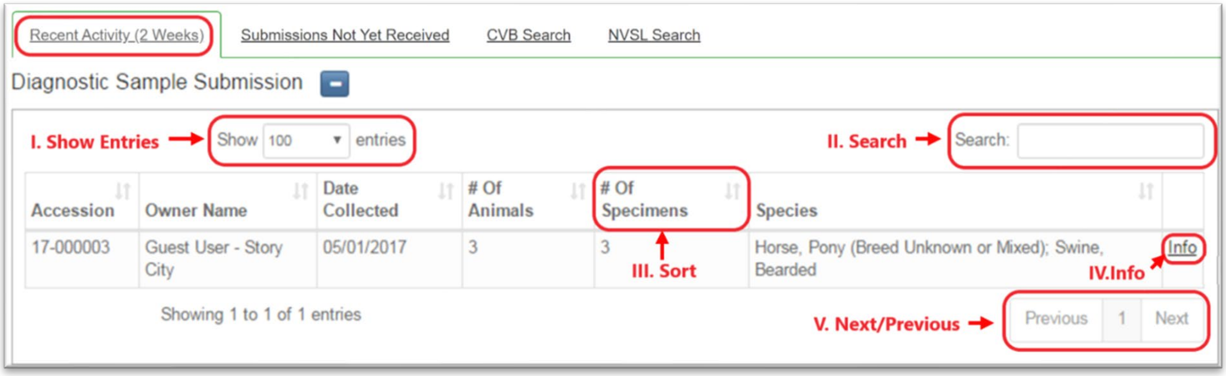
DIAGNOSTIC SAMPLE SUBMISSION FORM: SUBMISSION HISTORY



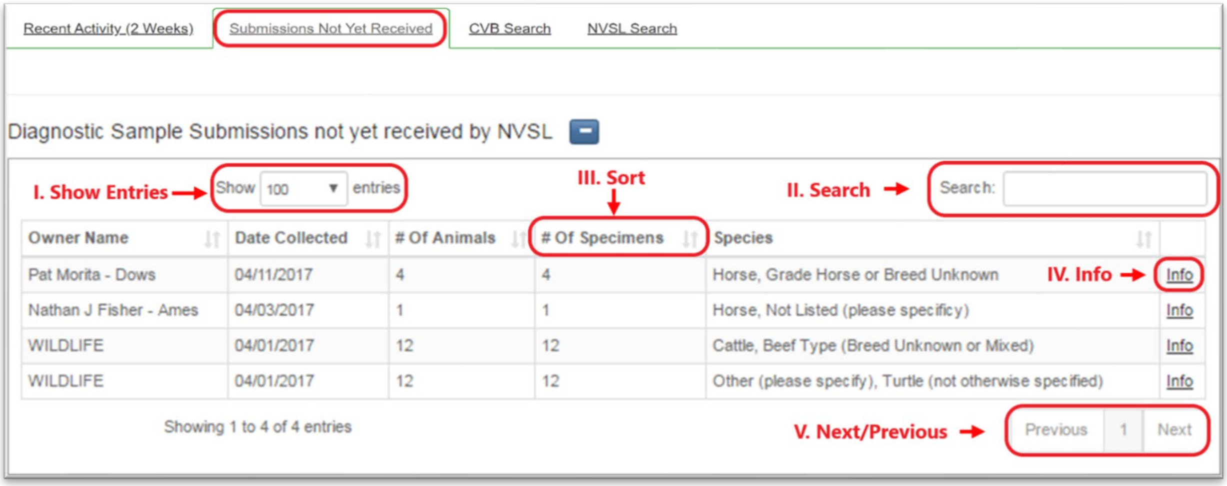
2. Recent Activity (2 Weeks)

A. Click “**Recent Activity (2 Weeks)”** to view submissions received or updated by the NVSL in the last 2 weeks.

- **I. Show Entries** –From the drop-down menu, select how many submission entries you want shown on the screen.
- **II. Search** – Enter a phrase to perform a wildcard search on all submission entries. This will search the data under each column header.
- **III. Sort** – Select any of the column headers to sort in ascending/descending order.
- **IV. Info** (hyperlink) – Select the info hyperlink on a desired submission to view that submission.
- **V. Next/Previous** – If more submissions are available than what is being shown, use the next/previous buttons to view the next page of submissions.

Return to Main Menu

DIAGNOSTIC SAMPLE SUBMISSION FORM: SUBMISSION HISTORY



3. Submissions Not Yet Received

A. Click "**Submissions Not Yet Received**" to view a list of your submissions not yet received by the NVSL.

I. **Show Entries** – From the drop-down menu, select how many submission entries you want shown on the screen.

II. **Search** – Enter a phrase to perform a wildcard search on all submission entries. This will search the data under each column header.

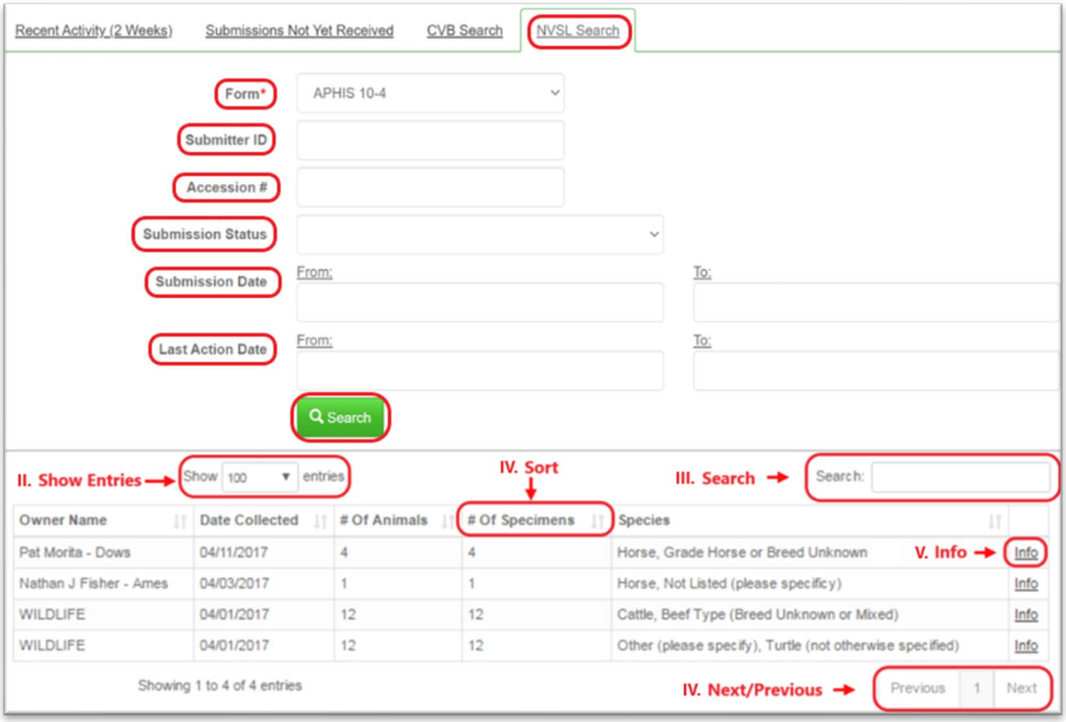
III. **Sort** – Select any of the column headers to sort in ascending/descending order.

IV. **Info** (hyperlink) – Select the info hyperlink on a desired submission to view that submission.

V. **Next/Previous** – If more submissions are available than what is being shown, use the next/previous buttons to view the next page of submissions.

Return to Main Menu

DIAGNOSTIC SAMPLE SUBMISSION FORM: SUBMISSION HISTORY



4. NVSL Search

A. Click "**NVSL search**" to search all historical submissions based on the desired type of form, submission status, & submission date.

I. Search Criteria:

a. Form – From the drop-down menu, select the desired form you would like to search.

b. Submission Status – From the drop-down menu, select the status of the submissions you would like to return.
Note: Not selecting a status will return all types.

c. Submission Dates – Enter dates from & to, to return submissions within the desired date range.

d. Search – Select this to perform a search on the entered criteria.

II. Show Entries – From the drop-down menu to select how many submission entries you want shown on the screen.

III. Search – Enter a phrase to perform a wildcard search on all submission entries. This will search the data under each column header.

IV. Sort – Select any of the column headers to sort in ascending/descending order.

V. Info (hyperlink) – Select the info hyperlink on a desired submission to view that submission.

VI. Next/Previous – If more submissions are available than what is being shown, use the next/previous buttons to view the next page of submissions.

[Return to Main Menu]