

How-to Manage Your Online CSUA

(Note: Only PI's and CS Lab Contacts have access to this system)

I. CSUA

A. Login with Single Sign On Account	2
B. Apply for a new CSUA	2
C. Renew CSUA	2
D. Print CSUA Report	3
E. Authorized Personnel Directions	
1. How-to Add Contacts	3
2. How-to Add Authorized Personnel	4
3. How-to Upload a Personnel Screening Data Sheet (PSDS)	5
4. Training	5
i. How-to view a lab's training status	
ii. How-to view a lab's training history	
5. Authorized Personnel History	5
F. Storage Site Directions	6
G. Substances Directions	
1. How-to Add Substances	6
2. How-to Change Yearly Order Estimate	7
H. Protocol/Protocol Link Directions	
1. How-to Add Protocol	7
2. How-to Link Substances to Protocol(s)	8
3. How-to Edit Substance/Protocol Link	8
I. Reviewing CSUAs as Department Chair	8

II. Ordering CS

A. Creating a CS Requisition	9
B. Printing a Requisition Supplemental Form	10

III. Inventory

A. Update Inventory	11
B. Submit Disposal Request	11
C. Submit Biennial Inventory	11

I. CSUA

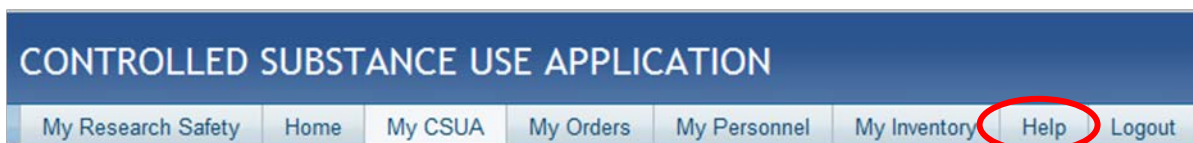
A. Login with Single Sign On Account

Please note that only PI's and CS Lab Contacts have access to this system.

1. Get a SSO account: Follow the link below for directions for obtaining Single Sign On account: <http://blink.ucsd.edu/technology/security/SSO/register.html>
2. To login to CSUA: Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On

B. Apply for a New CSUA

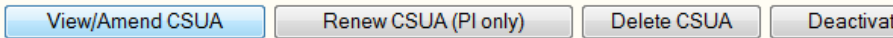
1. Read the online instructions & links to start: <http://blink.ucsd.edu/safety/research-lab/controlled-substances/CSUA.html#Apply-for-a-CSUA>
2. Once you are logged onto the Controlled Substance Use Application, select the 'My CSUA' tab.
3. Click on 'Apply for CSUA' to initiate a new application. Be sure to go through and complete all eight sections.
 - i. General
 - ii. CSUA Contacts
 - iii. Authorized Personnel
 - iv. CS Storage Site
 - v. Authorized Substances
 - vi. Protocols
 - vii. Link Substance to Protocol
 - viii. Submit New CSUA
4. Use the 'Help' tab at the top of the page for more detailed instructions.



C. Renew CSUA

(If the hyperlink from the automated e-mail is not working, please follow the instructions below)

1. **Update CSUA Prior to Renewal:** (PI and CS Lab Contacts only)
 - a. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
 - b. Under the 'My CSUA' tab, click 'My CSUA List'.
 - c. Select appropriate CSUA on your list. Click the 'View/Amend CSUA' button.

A row of five buttons: 'View/Amend CSUA' (highlighted in light blue), 'Renew CSUA (PI only)', 'Delete CSUA', 'Deactivate CSUA', and 'CSUA Report'.
 - d. Update Sections 2 -7 of the CSUA and save your changes.
 - e. CSUA changes do not require approval prior to renewal.

2. Update the remaining CS Inventory

- a. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- b. From the 'My Inventory' tab, use the drop down to select the 'Manage Inventory' page.
- c. Select appropriate CSUA and click the 'View all CSUA Inventory' button.
- d. For each item that needs to be updated, click on the small circle on the left and click on the 'View/Edit' button on the bottom to edit the 'Remaining Amount' in a popup window.

- e. To update a bottle to reflect its complete use, please change the '**Remaining Amount**' to '0' and upload a copy (in PDF) of your used log sheet and it will be automatically removed from your current inventory list.
 - i. If you cannot upload the log sheet please send a copy of it to the CS Program (Fax: 858-822-0561, MC 0090).
 - ii. Deface the label on the container and dispose of the container as you would any other chemical bottle of the same type.

3. Instructions to Renew: (CSUA PI only)

- a. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On.
- b. Under the '**My CSUA**' tab, click '**My CSUA List**'.
- c. Select appropriate CSUA on your list. Click the '**Renew CSUA (PI only)**' button.



- d. A CSUA Summary page should pop-up.
- e. Click the '**Renew CSUA**' button at the top of the CSUA Renewal page.
- f. EH&S will send an email confirmation to the PI and Lab Contact(s) when the renewal is complete.

D. Print CSUA Report

1. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. Under the '**My CSUA**' tab, click '**My CSUA List**'
3. After you've clicked the bubble next to the appropriate CSUA, click the '**CSUA Report**' button.



- a. *Note: only current and approved items will be displayed*

E. Authorized Personnel Directions

1. **How-to Add CSUA Contacts** (persons designated to have administrative rights to the online CSUA)

Note: All Primary and Secondary Lab Contacts listed in Section 2 will automatically be listed in the Authorized Personnel list (Section 3) and will need to complete a Personnel Screening Data Sheet to complete the CSUA Lab Contact role.

There can be up to ten secondary lab contacts.

- a. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- b. Under the '**My CSUA**' tab, go to '**My CSUA List**'
- c. After you've clicked the bubble next to the appropriate CSUA, click the '**View/Amend CSUA**' button.



- d. Using the navigation on the left side of the screen, click on '**2-CSUA Contacts**' section
- e. Use the search utility at the bottom of the screen, to find the person you're looking for.

Search Screen

Search People ?

Last Name First Name Search

Select	Last Name	First Name	Email	Department
<input type="radio"/>	SIMPSON	MARGE	labcontact1@gmail.com	MEDICINE

If you cannot find the person, please click [here](#) for help.

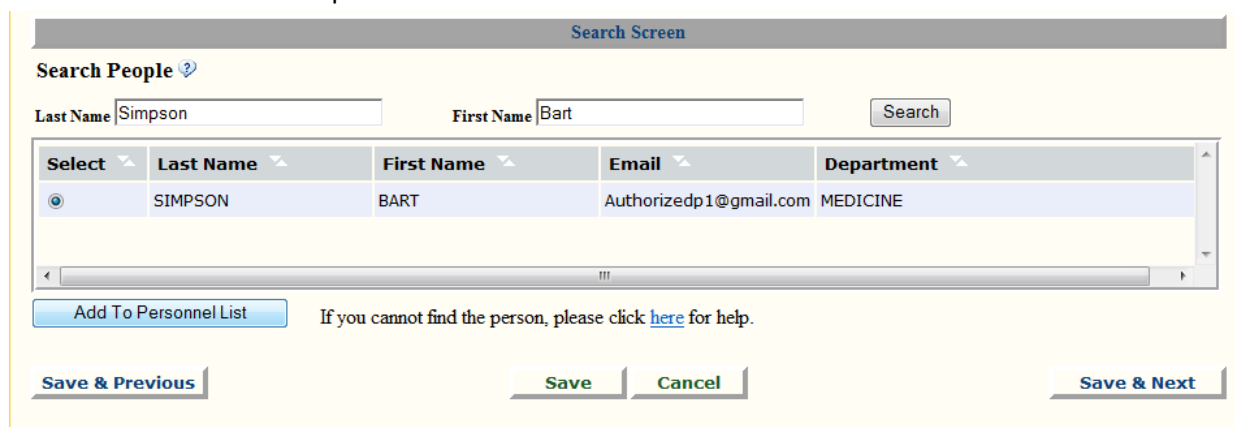
- f. Select the person you would like to add then click on the '**Add To Contact List**'
- g. Designate a Role (PI, Primary Lab Contact, etc.) and click '**Save**'

2. How to Add Authorized Personnel (those authorized to handle controlled substances)

- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- Under the 'My CSUA' tab, go to 'My CSUA List'
- After you've clicked the bubble next to the appropriate CSUA, click the 'View/Amend CSUA' button.



- Using the navigation on the left side of the screen, click on '3-Authorized Personnel'
- Use the search utility at the bottom of the screen, to find the person you're looking for.
- Click the bubble next to the person's name and use the 'Add to Personnel List' button.



Select	Last Name	First Name	Email	Department
<input checked="" type="radio"/>	SIMPSON	BART	Authorizedp1@gmail.com	MEDICINE

- Designate the person's additional responsibilities:
 - Auth Recipient** – those with the privilege to pickup CS packages when they arrive at EH&S
 - Storage Key/Code** – those with access to the CS Storage Key or Combination Code
- Be sure to hit 'Save' at the bottom of the page to save the changes you have made
- An email will be sent to the newly added people requesting them to complete a PSDS (Personnel Screening Data Sheet) and CS Training.
 - When the completed PSDS and CS Training confirmation from UC Learning Center is received at EH&S, an approval email will be sent. A copy of this email is sent to the CS Lab Contacts.
 - Note: Only approved Authorized Personnel may work with Controlled Substances.**

3. How to upload a PSDS (Personnel Screening Data Sheet)

- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- Under the 'My CSUA' tab, go to 'My CSUA List'
- After you've clicked the bubble next to the appropriate CSUA, click the 'View/Amend CSUA' button.



- Using the navigation on the left side of the screen, click on '3-Authorized Personnel'
- Find the person you wish to add a PSDS for and click on their 'Upload' link in the PSDS column
- Click on the 'Browse' button and upload the file from your computer
 - Note: Only PDF files may be uploaded
- Click on the 'Save' button at the bottom of the screen

4. Training

How to view a lab's training status

- If you are the CS Lab Contact or the PI of a CSUA:
- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On.

- c. Click on the My CSUA tab, then select the CSUA number and the **'View/Amend'** button at the bottom of the page.
- d. From this page, select the **'3-Authorized Personnel'** hyperlink on the left-hand side. This will display the current and pending Authorized Personnel and their training status. There are three status descriptions:
 - i. Complete: The AP took the online or in-person training.
 - ii. Incomplete: The AP has not taken any type of training yet.
 - iii. Expired: Last training taken was over 4 years ago, so they have to take the training course again.
- e. To see exact training dates for each person, select the person and the **'View/Edit'** button and a detailed popup window will appear with the person's CS training history appearing at the bottom of the screen.

Note: CS training data is not editable in the CSUA. The information is updated daily when EH&S receives e-mail confirmation of training completion from UC Learning Center.

How to view a lab's training history

- a. To access the training history page, click on **'Personnel Training'** under the **'My Personnel'** tab.
- b. Search by PI Last name or Personnel Last Name and click **'Search AP Training'**
- c. This will list all the CS training courses that the specific AP has completed and the dates of completion.

Note:

- CS Training available at UC Learning Center: keyword "CSUA".
You can find more information about CS Training here: <http://blink.ucsd.edu/go/cstraining>
- Training is required for new Authorized Personnel, with retraining required every four years.
- CS training data is not editable in the CSUA. The information is updated daily when EH&S receives e-mail confirmation of training completion from UC Learning Center.

5. Authorized Personnel History

- a. To access the personnel history page, click on "Authorized Personnel" under the "My Personnel" tab.
- b. Select PI by last name and/or search by Personnel Last Name.
- c. You can also search using the AP status.
- d. CS training status will be listed in **'CS Training'** column. There are three status descriptions.
 - i. Complete: The AP took the online or in-person training.
 - ii. Incomplete: The AP has not taken any type of training yet.
 - iii. Expired: Last training taken was over 4 years ago, so they have to take the training course again.

F. Storage Site Directions

1. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. Under the **'My CSUA'** tab, go to **'My CSUA List'**
3. After you've clicked the bubble next to the appropriate CSUA, click the **'View/Amend CSUA'** button.
4. Using the navigation on the left side of the screen, click on **'4-CS Storage Site'**
5. Use the bottom of the screen to select a **'Storage Type'** and **'Building/Location'**

- Click on the **'Add to CS Storage Location List'** and then click **'Save'**

- Lab will be contacted by EH&S manager to set up appointment for visiting the new storage site/space. All storage sites added to the CSUA must be approved by EH&S to be considered valid

G. Substances Directions

1. How to Add a [Substance](#)

- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- Under the **'My CSUA'** tab, go to **'My CSUA List'**
- After you've clicked the bubble next to the appropriate CSUA, click the **'View/Amend CSUA'** button.
- Using the navigation on the left side of the screen, click **'5- Authorized Substances'**
- Using the search utility at the bottom, find the substance you wish to add to your CSUA and click **'Add Substance To List'**

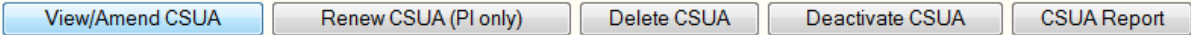
- Enter a **'Yearly Order Estimate'** in the units specified for that substance based on how much you anticipate on buying for the calendar year
- Click the **'Save'** button at the bottom of the page

2. How to Change Yearly Order Estimated Usage

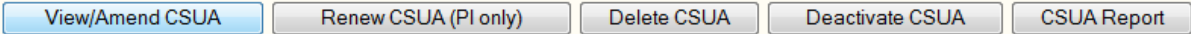
- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- Under the **'My CSUA'** tab, go to **'My CSUA List'**
- After you've clicked the bubble next to the appropriate CSUA, click the **'View/Amend CSUA'** button.
- Using the navigation on the left side of the screen, click **'5- Authorized Substances'**
- Change the **'Yearly Order Estimate'** for the appropriate substance
- Click **'Save'** at the bottom of the screen

H. Protocols

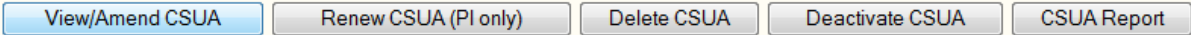
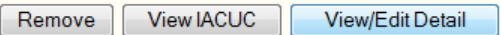
1. How-to Add a Protocol

- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- Under the 'My CSUA' tab, go to 'My CSUA List'
- After you've clicked the bubble next to the appropriate CSUA, click the 'View/Amend CSUA' button.

- Using the navigation on the left side of the screen, click on '6- Protocols'
- On the bottom portion of the page, select the appropriate protocol type and fill in all of the required fields
 - If you are adding an animal protocol, fill in the Protocol Number field and click the Search IACUC button. All remaining fields will be automatically filled using the information from the IACUC database
 - If you are adding an in vitro protocol you will be required to upload supplemental paperwork on the next page.
- Once all required fields are complete, click the 'Add Protocol To List' button and hit 'Save'

2. How-to Link Substances To a Protocol

- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- Under the 'My CSUA' tab, go to 'My CSUA List'
- After you've clicked the bubble next to the appropriate CSUA, click the 'View/Amend CSUA' button.

- Using the navigation on the left side of the screen, click on '7-Link Substance to Protocol'
- At the bottom of the screen, select the 'Substance' and 'Protocol' you wish to link
- Complete all fields
 - Dosage per Animal
$$= (avg\ weight\ of\ animal) \times dose \times (avg\ number\ of\ doses\ give\ to\ each\ animal)$$
 - Route(s) of CS Administration
 - Species
 - CS Purpose
 - Number of animals to be treated per year
- Click the 'Add to List' button when information is complete
- Click the 'Save' button at the bottom of the page

3. How-to Edit Substance/Protocol Link

- Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
- Under the 'My CSUA' tab, go to 'My CSUA List'
- After you've clicked the bubble next to the appropriate CSUA, click the 'View/Amend CSUA' button.

- Using the navigation on the left side of the screen, click on '7-Link Substance to Protocol'
- Select the link that you wish to update and click the 'View/Edit Detail' button.

- A popup box will open – please update any "0" or "TBD" with accurate information. Hit 'Save' when you are done.
 - You may find that if you click the 'View IACUC button' on the back screen it will provide some helpful IACUC protocol information for calculating the dosage per animal.
- Each substance must be linked to at least one protocol. EH&S will need to review the entry before the link can be used in the My Order tab.

I. Reviewing CSUAs as Department Chair

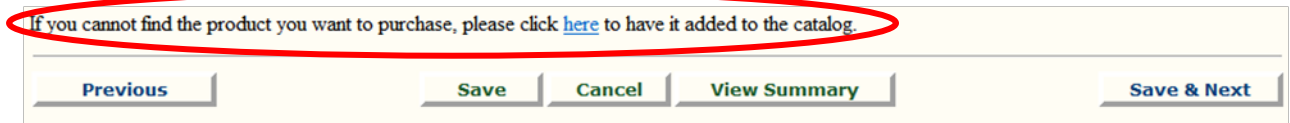
(If the hyperlink from the automated e-mail is not working, please follow the instructions below)

1. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. From the 'Chair Review' tab, use the drop down to select 'Review Pending CSUAs'
3. Select the appropriate CSUA by clicking on the hyperlink
4. Review the CSUA Summary and click on either the 'Approve' or the 'Reject' buttons at the top of the page

II. Ordering

A. Creating a CS Requisition

1. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. Under the 'My Orders' tab, select 'Create Requisition'
3. Select the appropriate CSUA under which you are ordering and click the 'Create CS Requisition' button
4. Enter an Index Number and click 'Save & Next'
5. Click on the substance you would like to order to expand the list of products and vendors for that substance
 - i. Note: only substances that are approved on your CSUA will display here
 - ii. If you cannot find the substance you wish to purchase, you will need to add it to the list of authorized substances for your CSUA- this can be changed in section 5 under the My CSUA tab
6. Specify the quantity you wish to order then click 'Save & Next'
 - i. If you cannot find a product from a specific vendor or for a specific size, click on the hyperlink above the 'Save' button. You will be notified once EH&S is able to add the product to our catalog



7. Click the blue 'Protocols' link to select the protocol under which the CS will be used. Click 'Save' and close the popup window. Click the 'Save & Next' button to get to the Certification page.
 - i. If none appear please create/edit a link in section 7 of the CSUA under the My CSUA tab – once it's approved, it will be available to select on the requisition
8. Certify the requisition by selecting the 'Agree' radio button and click 'Save'.
9. **Print out the 'Requisition Supplemental Form',**
10. **Send the PI-signed CS Requisition Supplemental form to CS Program:**
 - i. E-mail: ehscs@ucsd.edu
 - ii. Fax (858)822-0561
 - iii. Mail: ATTN: CS PROGRAM (MC 0090)
11. CS Lab Contacts will be notified via email when the request is approved by CS Program, when the order has been placed, and when the shipment is ready for pickup

B. Printing a Requisition Supplemental Form

1. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. Under the 'My Orders' tab, select 'View Requisitions'
3. Select the appropriate CSUA in which the order was placed and then click the 'View CS Requisition' button
4. Under the 'Supplemental Report' column, click on 'View Report' for the selected Requisition Number

Requisition No.	CS Order No.	Status	Status Date	CSUA	PI Name	Supplemental Report
CSR1086	TBA by Purchasing	Deactivated	09/06/2011	64	SIMPSON	View Report

III. Inventory

A. Update Inventory List

1. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. From the 'My Inventory' tab, use the drop down to select the 'Manage Inventory' page
3. Select the CSUA number and click the 'View All CSUA Inventory' button.
4. Select the appropriate item and click on the 'View/Edit' button on the bottom of the page
5. A pop-up window will open
6. Update the 'Remaining Amount'
 1. If a substance has zero remaining, please upload or submit a copy of your used log sheet to the CS Program (email: ehscs@ucsd.edu, Fax: 858-822-0561, MC 0090).

B. Submit a Disposal Request for Items with a Non-zero Remaining Amount

1. Log in to Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. From the 'My Inventory' tab, use the drop down to select the 'Manage Inventory' page
3. Use the dropdown menus 'Search on' or 'CSUA No.' to search your inventory
4. Once the product appears in the search results, select the product and click the 'View/Edit' button
5. Update the 'Remaining Amount' of the substance, click the 'Save' button and then the 'Close' button
6. Check the disposal box for the product and click the 'Submit Disposal Request' button, as seen below

Search Results								
	Product Name	Catalog #	Strength	Container ID	Container Size	Remaining Amount	Expiration Date	Dispose
<input type="radio"/>	Buprenorphine	029308	0.3 mg/mL	sdsu123	5.0 mL	5.0 mL	09/30/2011	<input type="checkbox"/>
<input type="radio"/>	Ketamine	000680	100.0 mg/mL	0507HS5	10.0 mL	10.0 mL	09/01/2013	<input type="checkbox"/>
<input type="radio"/>	Ketamine	000680	100.0 mg/mL	0507HS6	10.0 mL	10.0 mL	09/01/2013	<input type="checkbox"/>
<input type="radio"/>	Ketamine	000680	100.0 mg/mL	0507HS7	10.0 mL	10.0 mL	09/01/2013	<input type="checkbox"/>
<input type="radio"/>	Ketamine	000680	100.0 mg/mL	0507HS8	10.0 mL	10.0 mL	09/01/2013	<input checked="" type="checkbox"/>

C. Submit Biennial Inventory

1. Log in to the CSUA at <https://ehs.ucsd.edu/csua> with your Single Sign On
2. Select the 'My Inventory' tab and choose the 'Update Biennial Inventory' option.
3. Select the appropriate 'CSUA Number' and click the 'Search My Inventory' button.
4. Update the Amount Remaining column for each controlled substance on this page to match the actual remaining amount in your possession.
5. Press the 'Update/Submit Biennial Inventory' button to record your Biennial Inventory.