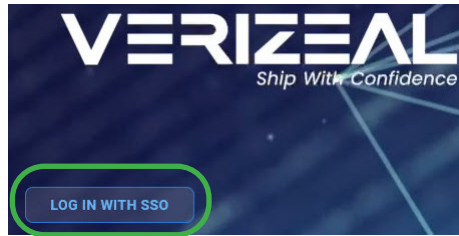


## Creating a Shipment of Biological Materials in eShip Global

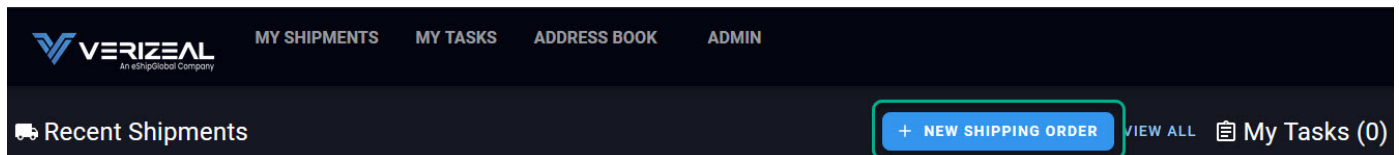
### 1. Get Started

Navigate to <https://northwestern.verizeal.com> and select “Log in with SSO”. Log in using your Northwestern netID and password. The person logging in and creating the shipping order must have a current Safe Shipping of Biological Materials and Dry Ice Certification in myHR Learn.

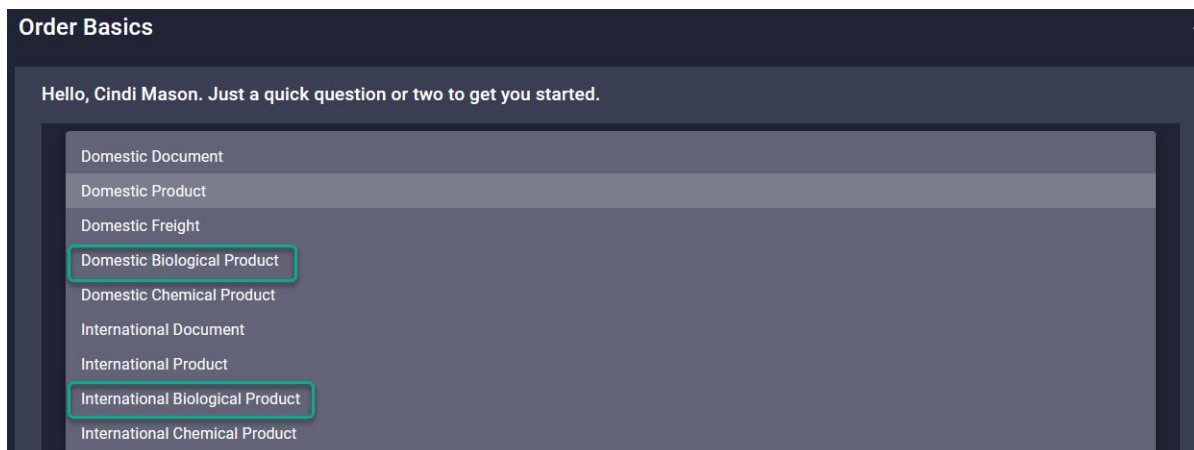


### 2. Create a New Shipping Order

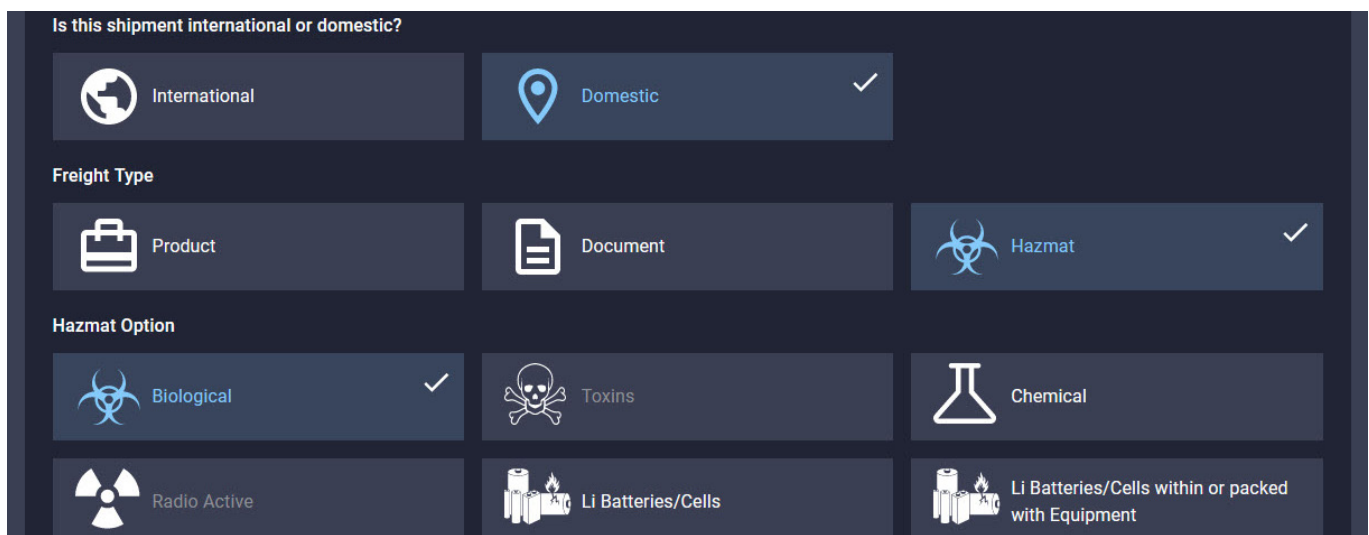
Select “+ New Shipping Order”.



On the Order Basics screen, open the drop-down for Profile and select your shipment type, “Domestic Biological Product” or “International Biological Product”.



Your choice will automatically set “Is this shipment international or domestic?”, “Freight Type”, and “Hazmat Option” fields.



Review the Hazmat Certification information and select Next.

Hazmat Certification

Check the 'I Agree..' box below to agree to the following:

I am a researcher/clinical staff member with in-depth knowledge of the material being shipped.

It is my responsibility to properly:

- And completely identify the material in eShipGlobal
- Classify the material being shipped
- Package the material
- Document the shipment
- Label the package
- If requested, completely and thoroughly review any export materials provided

☒ I Agree to the above requirements

Signature

NEXT

Select Next again on the Order Basics summary screen.

Order Basics

Opened 18 Jul 2024 by Cindi Mason

Business ✓

Domestic ✓

Hazmat ✓

Biological ✓

Signature

Your Signature

BACKNEXT

3. Enter Sender Information

Now enter Sender information. You can choose yourself (default sender), “Select from Contacts” (if you have saved any contacts), or choose “Enter Address”.

To Select from Contacts, start typing the name of your contact and a list will appear. Select the Contact and then select “Set Sender”.

DEFAULT SENDERSELECT FROM CONTACTSENTER ADDRESS

Search for a contact

william

William Wildcat

345 East Superior Street, Suite 1522  
Chicago, IL 60611 United States  
williewildcat@northwestern.edu  
+13125038300

SET SENDER

To Enter Address, complete all the fields. Note that Sender Phone requires a 1 before the area code for U.S. numbers. You may Save to Address Book by checking the box. When finished, select “Set Sender”.

The screenshot shows a web form titled "Sender" with three tabs: "DEFAULT SENDER", "SELECT FROM CONTACTS", and "ENTER ADDRESS". The "ENTER ADDRESS" tab is active. Below the tabs is a section titled "Sender Information" with the note "All fields required unless indicated." The form contains several input fields: "Sender Name", "Company / Institution (optional)", "Sender Email Address", "Sender Phone" (which includes a country code dropdown set to the United States), "Sender Address" (with an example "+1 312 503 8300"), "Country" (dropdown set to "United States"), "Street Address, P.O. Box, Company Name, c/o", "Apartment, Suite, Unit, Building, Floor", "Additional Address Information", "City", "State, Province, Region" (dropdown), and "Zip/Postal Code". At the bottom left, there is a checkbox labeled "Save to Address Book". At the bottom center, there is a blue button labeled "SET SENDER". Red boxes are drawn around the "Sender Phone" field, the "Save to Address Book" checkbox, and the "SET SENDER" button.

#### 4. Enter Recipient Information

Follow the same process to enter Recipient information. You can “Select from Contacts” (if you have saved any contacts), or choose “Enter Address”. When Recipient information is complete, select Next.

#### 5. Enter Item/Product Details

Select the drop-down arrow for Class Type and select the appropriate category. We’ll use a cloning strain of *E. coli* as an example. Under Class Type Name, start typing the name of your biological material. Select your material from the list.

Please pay close attention when selecting Class Type Name as the drop-down menu does not always display the complete name.

Item/Product Details

Product

Animal

Bacteria

Biological-Other

Cell Line

Fungus

Human

Nucleic Acid

Parasite

Toxins

Viral Vector

Virus

Other

Item/Product Details

Product

Class Type

Bacteria

Shipping Name

Transportation Options

☒ Passenger or Cargo air carrier

☐ Cargo air only

Class Type Name

esch

Escherichia coli - BSL1 Cloning Strain, no or non-pathogenic

Escherichia coli - BSL1 Cloning Strain, pathogenic

Escherichia coli - adherent-invasive

Escherichia coli - enterohemorrhagic (EHEC)

Escherichia coli - shiga toxin producing (STEC)

Escherichia coli - verotoxin or verocytotoxin producing

Transportation Options has a default value of “Passenger or Cargo air carrier”. When shipping Category A substances > 50 ml or 50 g, change this value to “Cargo air only”.

Transportation Options

☒ Passenger or Cargo air carrier

☐ Cargo air only

Next enter Product Weight details. You must enter a Unit Value in U.S. Dollars.

Product Weight

Weight

L

Weight

30

ml

Unit Details

No. of Units

1

Unit of measurement

Unit Value

1

USD

Calculated

Product value

1

USD

Total weight

0

L

Total weight

30

ml

The “Description” field is optional. However, to support export compliance reviews, we recommend providing a brief summary of the material and its intended use by the recipient.

Description

E. coli cloning strain for research collaboration.

If your material contains any chemical preservative, check the box. Then enter the type of preservative, the maximum primary container volume, and the maximum outer container volume.

☒ Material contains any chemical preservative?

Preservative ▼

Required

Max Primary Container Volume Unit ml ▼

Must be a number greater than 0  
Max: 30 ml

Max Outer Container Volume Unit ml ▼

Must be a number greater than 0  
Max: 1000 ml

Complete this section by selecting “Save Item”. You will see a pop-up saying “Item added successfully!” Select OK, then select Next to move on to the Packaging/Contents section.

## 6. Enter Packaging/Contents

Indicate how many packages will be included in this shipment, then select Package Purpose from the drop-down menu.

Packaging/Contents

How many packages will be included in this shipment?

1 ▼

☐ All packages are same size, weight, contents, and value

Package 1 of 1 Details

Items

Escherichia coli - BSL1 Cloning Strain, no or non-pathogenic insert, 1 ✕

Purpose of Shipment

Research Collaborations

Selling Items

Sending product samples

Sending these items to be Repaired

Returning the shipment

Scholarship

Teaching

These are documents. No commercial value

Other (Enter new Value)

Under Package Profile, select “Fibreboard Box” (if using a cardboard box). If using a different type of package, you may leave this field blank. Enter Package Type, Package Provider (Custom) and Package Name as well as weight and dimensions of your package. Monetary value will auto-fill from the value you entered in Item/Product Details section.

Package Profile

Fibreboard Box ▼

Package Type

Box ▼

Package Provider

Custom ▼

Package Name

Fibreboard Box ▼

Enter package dimensions

Length 8 Width 8 Height 8 Unit IN ▼

Enter weight

Weight 3 Unit LB ▼ Weight Unit OZ ▼

Monetary value

Declared Value 1.00 USD ▼ Insurance Value 1.00 USD ▼

You can leave Package Contents blank and Reference Numbers at their default values.

If your package will contain dry ice, check the box and complete the details. Dry ice must be listed in kg.

☒ Package will contain refrigerant

Refrigerant Type

Dry Ice

Weight

.5

Unit

KG

Dry Ice Packaging Instructions

Packaging Number

954

Indicate if your shipment has a Material Transfer Agreement (default setting is No). If you are unsure if your shipment requires a Material Transfer Agreement, visit the Sponsored Research website:

<https://sponsoredresearch.northwestern.edu/agreements/mta.html>.

If your shipment is related to a Sponsored Research project, select the radio button for yes, then enter the project number.

Does your shipment have a Material Transfer Agreement?

☐ Yes ☒ No

Is your shipment related to a Sponsored Research project?

☒ Yes ☐ No

SP Number

Required

When all Packaging/Contents details are complete, select Next to move on to the Rate Quote section.

7. Select Rate Quote

Select the desired shipping service and indicate if a signature is required.

Rate Quote

ASSIGN TASK

Expected Ship Date

25 Jul 2024

Shipping Rates

Carrier	Service	Actual Delivery	List Price	Your Price
<input type="radio"/> FedEx	✈ First Overnight	Fri, Jul 26, 8 AM	\$93.32	\$90.26
<input type="radio"/> FedEx	✈ 2 Day AM Delivery	Mon, Jul 29, 10 AM	\$37.33	\$27.60
<input type="radio"/> FedEx	✈ Priority Overnight	Fri, Jul 26, 10 AM	\$56.41	\$25.30
<input checked="" type="radio"/> FedEx	✈ Standard Overnight	Fri, Jul 26, 5 PM	\$53.69	\$24.62
<input type="radio"/> FedEx	✈ 2 Day	Mon, Jul 29, 5 PM	\$33.92	\$22.23
<input type="radio"/> FedEx	📦 Express Saver	Tue, Jul 30, 5 PM	\$32.04	\$21.11
<input type="radio"/> FedEx	📦 Ground	Fri, Jul 26, 11 PM	\$13.30	\$11.93

Rows per page: 1-7 of 7

Shipping Extras

☐ Signature Required

☐ Non Standard Container

Select Next to move on to the Billing/Payment section.

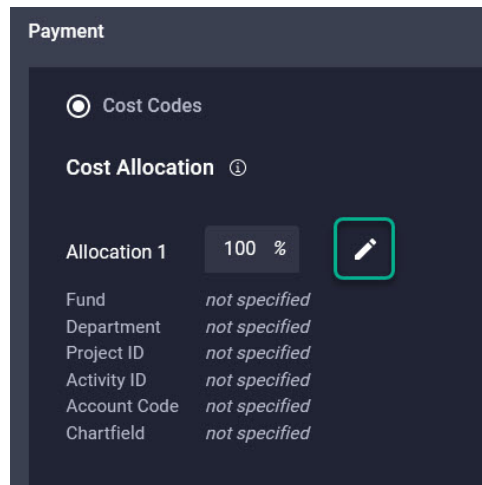
## 8. Enter Billing/Payment Information

Leave Billing radio button at default setting of “Bill default carrier account”.



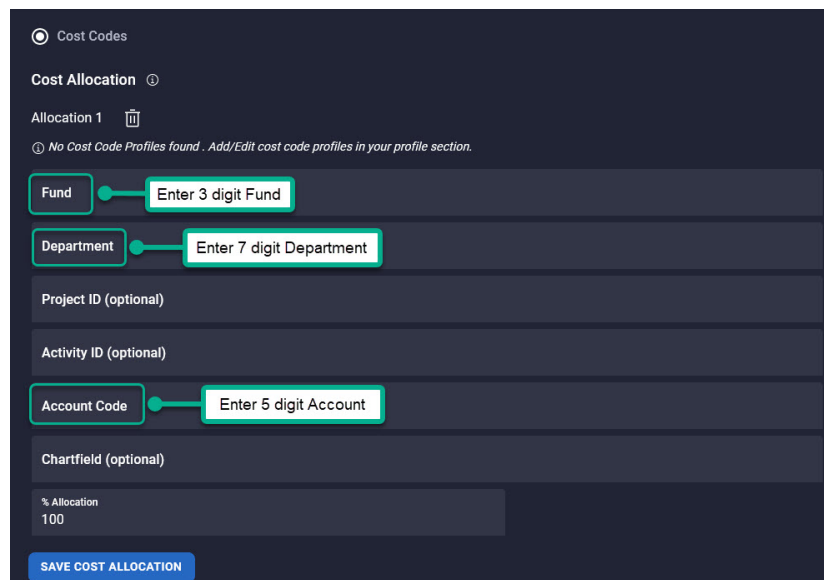
The Billing section contains two radio buttons. The first, "Bill default carrier account", is selected. The second, "Bill 3rd party carrier account", is unselected.

Select the “Cost Codes” button to enter chart string information. Then select the pencil icon to enter your chart string. You must enter a chart string that is designated for shipping costs and that has funds available. Contact your financial administrator for more information about your correct chart string for shipping.



The Payment section shows the "Cost Codes" radio button selected. Below it, the "Cost Allocation" section is visible. It shows "Allocation 1" with a value of "100 %". To the right of the percentage is a pencil icon. Below this, a list of fields is shown, all with the value "not specified": Fund, Department, Project ID, Activity ID, Account Code, and Chartfield.

Required chart string fields are Fund, Department, and Account Code. Project ID, Activity ID and Chartfield are optional fields in eShip but may be required by your department or funding source. Contact your financial administrator for more information.



This is a detailed view of the "Cost Allocation" form. It shows the "Fund" field with a red box and a red arrow pointing to it, with the text "Enter 3 digit Fund". The "Department" field has a red box and a red arrow pointing to it, with the text "Enter 7 digit Department". The "Account Code" field has a red box and a red arrow pointing to it, with the text "Enter 5 digit Account". The "Project ID (optional)" and "Activity ID (optional)" fields are empty. The "Chartfield (optional)" field is empty. The "% Allocation" field shows "100". At the bottom is a blue button labeled "SAVE COST ALLOCATION".

When finished entering chart string, select “Save Cost Allocation”, then select “Authorize Payment”.


## 9. Compliance

eShip will automatically route certain shipments for a compliance review when the shipment requires authorization to ship biological materials, or when a shipping permit or export license may be needed.

### a. Required Training

eShip automatically checks the training records of the person creating the shipping order in myHR Learn to ensure that you are currently authorized to ship biological materials. If your training is current, you will see a Success message. If your training is not current, you will see a Failed message. You must have current training (Safe Shipping of Biological Materials and Dry Ice Certification) to complete a biological shipment.

If your training is not current, you are not authorized to ship biological materials.

Compliance 					
 Required Training Determination <b>Success</b>	 Required Training Determination <b>Failed</b>				
User has appropriate training	User does not have appropriate training				
	<table><tr><th>SHIPPING CLASS</th><th>STATUS</th></tr><tr><td>GMMO</td><td>User does not have appropriate training to ship this class</td></tr></table>	SHIPPING CLASS	STATUS	GMMO	User does not have appropriate training to ship this class
SHIPPING CLASS	STATUS				
GMMO	User does not have appropriate training to ship this class				

### b. Shipping Permits

Some items require an export permit before shipping. If you do not have a required permit, you will receive a Failed message. Secure the proper permit from the appropriate regulatory agency in order to complete your shipment. If you need to apply for a permit, email [researchsafety@northwestern.edu](mailto:researchsafety@northwestern.edu) when your permit has been obtained.

×

Required Permits Determination Failed

User does not have appropriate permits

PERMIT	STATUS
USDA_IMPORT_TRANS_PERMIT	User does not have appropriate permits to ship this product

### c. Export Compliance

International shipments are subject to export control regulations and many items (materials, substances, equipment, technical data, software) require federal government authorization depending on the item, end use, end user, and the destination. All international Category A shipments are also subject to export control regulations.

eShip will automatically route certain shipments for export compliance review by the Export Controls & International Compliance (ECIC) office when the shipment triggers a potential license requirement under export control regulations depending on the item, the end use, end user, and the destination. eShip will check for [export-controlled and embargoed countries](#), [restricted party screenings](#) (individual recipients and companies), and items that may require a license for the destination. More information is available on the [ECIC International Shipping website](#).

If your shipment triggers an export compliance review you will receive a 'Failed' message. The system will automatically route your shipment to the ECIC office for a licensing determination, and you can expect to hear from them via email soon after.



Once ECIC completes their review, they will document and clear the shipment on eShip. You will then be able to continue with your shipment.

Compliance

Passed - ECO Approved

License Determination for Destination **Failed**

License Determination for Destination check failed. A permit may be required

ECCN	DESTINATION	STATUS
1C351	Australia	Country Of Destination Regulated By The Country Chart.

Approved by Sylvia Garcia 0000

**Note:** All international shipments of biological materials will be reviewed by the ECIC office the first time they are shipped through eShip. The ECIC office will then determine if they can be automatically classified in the system to avoid subsequent export compliance reviews. Your shipment may still need to be reviewed based on other export compliance triggers.

If your shipment passes the export controls check, you will see Success messages and may continue creating your shipment.

Embargoed Countries Check: **Success**

No risk is associated with the recipient country

Restricted Party Screening - Name: **Success**

No risk is associated with the recipient party name

Restricted Party Screening - Company: **Success**

No risk is associated with the recipient company

Once your shipment passes all compliance checks, select Next to move on to the Confirmation section.

10. Confirmation

If all required information has been entered, you can select Complete Shipment and move on to the Shipping Documents section.

11. Shipping Documents

You can print all shipping documents by selecting the printer icon at the top of this section.

Shipping Documents

Checklist

For Shipment

Inside

☒ Packaging List

Package 1 of 1

Outside

☒ Exempt Human

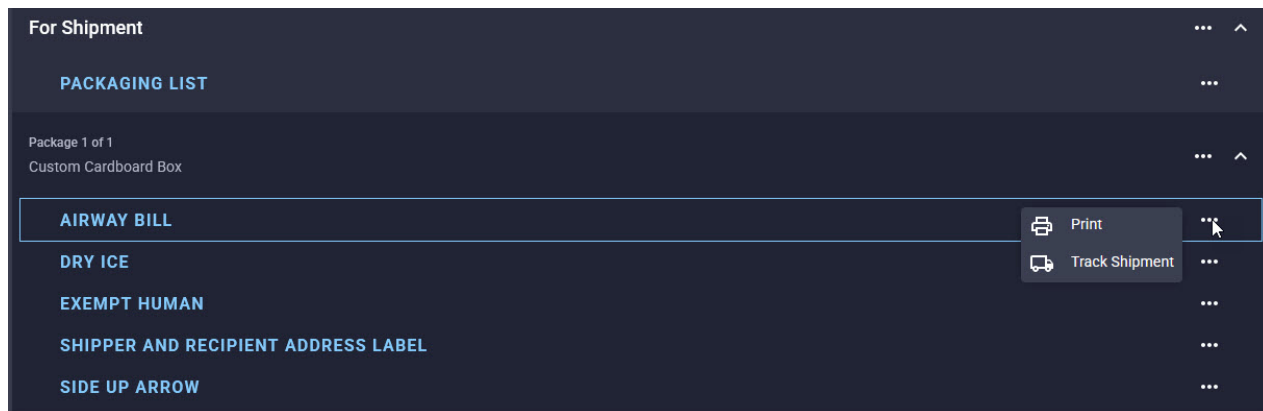
☒ Shipper and Recipient Address Label

☒ Side Up Arrow

☒ Airway Bill

☒ Dry Ice

You can print individual labels or shipping documents by selecting the individual label/document or by hovering over the three dots and selecting Print.



## 12. Schedule Pickup

Check the pickup address and add any Special Instructions, then select Schedule Pickup.