

# INSTRUCTIONS FOR COMPLETING THE LOAN & SAMPLE REQUEST FORM

## NMNH DEPARTMENT OF INVERTEBRATE ZOOLOGY

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Detailed information related to our loan and shipping policies can be found at the URL:

<https://naturalhistory.si.edu/research/invertebrate-zoology/specimen-loans>. All borrowers must read the policies and procedures posted at that URL BEFORE submitting a Loan & Sample Request Form. Failure to read and follow these instructions will delay the review and processing of your request and may result in its denial. **LOAN & SAMPLE REQUESTS FROM INDIVIDUALS WHO PREVIOUSLY FAILED TO COMPLY WITH OUR LOAN AND SHIPPING CONDITIONS WILL NOT BE APPROVED.**

The attached form is to be used for all requests involving the use of specimens in the National Museum of Natural History's Department of Invertebrate Zoology. These requests include, but are not limited to:

- requests to borrow specimens for exhibit or routine research-related, non-destructive, external morphological observations,
- requests involving the dissection of an entire specimen or part of a specimen,
- requests to remove part(s) of a specimen to prepare a permanent or temporary preparation such as a parapodial prep, radula prep or spicule prep,
- requests to prepare serial sections of all or part of a specimen,
- requests to remove tissue or tissues for any analytical procedure including DNA analysis or chemical analysis,
- requests to destructively analyze an entire specimen,
- requests to have a specimen donated for educational, exhibit or research purposes.

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### GENERAL INSTRUCTIONS: applicable to all loan and sampling requests

- 1 - **The BORROWER must be an individual with a permanent appointment at the named institution.** Loans for student, fellow or visiting researcher use must be requested by their professor or other tenured individual or permanent institutional employee.
- 2 - Except for signatures, initials and dates the attached form can be filled out using Acrobat Reader or Acrobat Professional.
- 3 - Hand written signatures, initials and dates are required where indicated - **electronic signatures are currently not accepted.** You must PRINT a copy of the completed form for signatures, initials and dates.
- 4 - SCAN the completed, signed form and send it as an e-mail attachment. **Do not use the SUBMIT function in Acrobat.**
- 5 - Send the completed request form and **\*\*all required supporting documentation\*\*** directly to the Department of Invertebrate Zoology Curator responsible for the corresponding collection. A list of curators, their collection responsibilities and their e-mail addresses can be found on the web at <http://invertebrates.si.edu/collcurator.htm>.  
**\*\* required documentation includes permit information and copies of required permits, return shipping information and for international shipments, official transmittal letters on the borrower's institutional letterhead.**  
See <https://naturalhistory.si.edu/sites/default/files/media/file/examplecustomsletterinternational.pdf> for a sample transmittal letter.
- 6 - Complete loan & sampling requests are processed in the order they are received. Incomplete requests will not be considered. Allow a minimum of 4-6 weeks for review, processing and shipping.

### SPECIFIC INSTRUCTIONS:

For **NON-DESTRUCTIVE loans** - specifically, routine, non-destructive, external morphological examinations only

- 7 - Complete all sections on pages 1 and 2.
- 8 - Follow all instructions in steps 1-6, above
- 9 - **If, after receiving the loan, you determine you need to dissect, prepare a slide, section or take a tissue sample, you MUST contact the approving curator, in writing, and request permission. If permission is not granted, in writing, you may not proceed with the dissection, slide preparation or other destructive process.**

For **DESTRUCTIVE ANALYSIS and TISSUE SAMPLING** - specifically, any activity that results in damage to, or permanent alteration to a specimen

- 10 - Complete all sections on pages 1, 2 and 3.
- 11 - Use the checkboxes on page 2 to indicate your need to make a special preparation or take a tissue sample.
- 12 - Use additional sheets of paper if more space is needed for Sections 1, 2 or 3 on page 3.
- 13 - Follow all instructions in steps 1-6, above.
- 14 - You may use the specimens ONLY for the project described in this request. **Any deviation** from the information provided in the original request **must be approved by the original approving official IN WRITING and IN ADVANCE of use.**

# LOAN and SAMPLE REQUEST FORM - NMNH DEPARTMENT OF INVERTEBRATE ZOOLOGY

Detailed loan policy information is available at <http://invertebrates.si.edu/loansPolicy.htm>. Please read our loan policy and procedures before completing this loan request form. You must complete pages 1 & 2 of this form and send the signed form and required documentation, by e-mail, to the appropriate Department of Invertebrate Zoology Curator for review. Contact information for our curators is available at

<https://naturalhistory.si.edu/research/invertebrate-zoology/specimen-loans/custodian-collection>

**NOTE: At this time digital signatures are not accepted on the Loan and Sampling Request Form**

## BORROWER NAME

(Last, First): \_\_\_\_\_

The **BORROWER** must be an individual with a permanent appointment at the named institution. Loans for student, fellow or visiting researcher use must be requested by their professor or other tenured individual or permanent institutional employee.

## INSTITUTION

NAME: \_\_\_\_\_

FOR STUDY BY: \_\_\_\_\_

**BORROWER CONTACT INFORMATION** - include area code or country & city codes as appropriate

PHONE #: \_\_\_\_\_

FAX #: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

## SHIPPING ADDRESS

Name, e-mail address, phone number and mailing address for BORROWER'S supervisor.

Museum Director

Dept Chairman

Other

Include complete institution name, street or building address, city, country and postal code.

## NO Post Office Boxes

**LOAN CONDITIONS:** Approval of this request is contingent upon the **BORROWER's** commitment to comply with all requirements and conditions placed on this loan. The **BORROWER** must read, initial and date each of the following statements. The **BORROWER's** initials next to a statement and the **BORROWER's** signature on the following page(s) are the **BORROWER's** guarantee that all requirements will be met and loan conditions followed. If the loan is requested on behalf of a student or visitor, the student or visitor must also initial each statement and sign the following page.

INITIALS & DATE

- 1 - I have read, understand and agree to comply with ALL loan and shipping requirements as described on the Department of Invertebrate Zoology web pages at <http://invertebrates.si.edu/collections.htm>. \_\_\_\_\_
- 2 - I will return the "Sign & Return" copy of the invoice immediately upon receipt of the specimens. \_\_\_\_\_
- 3 - I understand this loan, if approved, will be made to my institution, not to me, and that the Head of my institution or my Department Chairman undertakes full responsibility for the proper care and return of these specimens. \_\_\_\_\_
- 4 - I understand the **specimens must be maintained in the original preservative and preservative concentration at all times and must be shipped back to the Smithsonian in the original preservative and concentration even if I must pay for special hazardous materials shipping, unless authorized otherwise in writing by NMNH.** \_\_\_\_\_
- 5 - I agree to follow all international and US shipping laws including IATA, US-DOT and USPS. I understand that specimens preserved in fluid may not be shipped using the mail. \_\_\_\_\_
- 6 - I understand that I am not permitted to dissect, clear & stain, section, sample, remove tissue for molecular analysis, or alter the specimens in any way without written permission from NMNH. Page 3 of this form, the "Sampling Addendum", must be completed and submitted before any sampling or destructive analysis may be conducted. \_\_\_\_\_
- 7 - I understand that all labels must be kept with the specimens at all times and returned with the specimens. \_\_\_\_\_
- 8 - Further, I understand that I am responsible for complying with ALL applicable laws and regulations related to the transport and import/export of these specimens. I also understand it is my responsibility to contact appropriate officials to obtain information related to permits, customs inspections and clearance, and hazardous materials shipping BEFORE submitting this loan request. \_\_\_\_\_
- 9 - I understand that I am responsible for ALL permit, inspection and return shipping expenses. \_\_\_\_\_

**I confirm that I currently have NO overdue loans from the NMNH Department of Invertebrate Zoology. All previous loans to me have either been completely returned or are not yet due to be returned.**

PROJECT TITLE:

PURPOSE OF THIS LOAN: Check all that apply    For Examination    For Identification    For Sampling/Analysis    For Exhibit

PROJECT DESCRIPTION: *Briefly* describe your project and how the requested material will be used to support your research.

**SPECIMENS REQUESTED:** Limit 20 specimen lots per loan request. The description of each specimen lot must include Phylum, Class or Order, Family, Genus, Species, Author, Type Status, and USNM Catalog Number if specimen is cataloged. **Requests for uncataloged material will be considered ONLY if the description of the desired specimens is sufficient to allow us to quickly locate the material.** **SAMPLING, PREPARATION or ANALYSIS:** Indicate in the checkbox after each specimen entry if you are requesting permission to take a sample or make a preparation (i.e. dissect, section, radula, parapodium. etc.) of the specimen. Complete and submit page 3 of the Loan Request Form if you are requesting permission to make a preparation or take a sample. Rarely we may have existing DNA extracts in our collection available for analysis. *Check here if you are interested in receiving an aliquot of an existing sample.*

**WE DO NOT GUARANTEE THE ACCURACY OF ANY IDENTIFICATIONS**

USNM #	TYPE STATUS	PHYLUM	DESCRIPTION (Family, Genus & Species or lowest taxonomic rank)	PREPARATION (Dry/Alc/Slide/SEM)	REQUEST PERMISSION TO DISSECT, SECTION OR MAKE PREPARATION	REQUEST TO TAKE A SAMPLE
1-						
2-						
3-						
4-						
5-						
6-						
7-						
8-						
9-						
10-						
11-						
12-						
13-						
14-						
15-						
16-						
17-						
18-						
19-						
20-						

I have read and understand the requirements described on the first page of this form and on the IZ website. If my request is approved I agree to comply with all of the conditions of the loan. If permission has been granted for sampling I will comply with sample labelling and electronic dataset submission requirements as described on the IZ website.

**BORROWER NAME**

(Last, First): \_\_\_\_\_

**SAMPLING & MOLECULAR ANALYSIS****ADDENDUM TO IZ LOAN REQUEST FORM**

The full text of the Department of Invertebrate Zoology's *Genetic Resources Policy* is available at <https://naturalhistory.si.edu/research/invertebrate-zoology/specimen-loans/destructive-sampling>. It is the borrower's responsibility to completely read and understand the policy BEFORE submitting a sampling request. Full compliance with the *Genetic Resources Policy* is a condition of every loan approved for sampling. Approved sampling requests are considered LOANS and are monitored and managed as a loan to the Borrower identified on the first page of this loan request form. All NMNH specimens, parts of specimens, or extracts, preparations or derivatives from them on loan to the Borrower are for the exclusive use of the Borrower during the course of the project described below and may NOT be shared with other persons or used for commercial applications. Section 3, below, must specify what body parts are to be sampled and what parts, preparations, extracts or derivatives will be returned to NMNH. Any subsequent deviation from these conditions must have prior written approval from relevant NMNH staff. The loan will not be considered "RETURNED" and "CLOSED" until all specimens and remaining parts, extracts, preparations and derivatives thereof are properly labeled and returned to us, and the required electronic datasheet is submitted to us for our records and, if appropriate, the GenBank accession number has been reported to us.

**For rare materials we may, at our discretion, prepare the samples and perform the DNA extraction at NMNH.**

**PROJECT TITLE:**

**1 - PROJECT GOALS:** Briefly describe the purpose of the sampling within the larger context of the project description given on page 2,

**2 - JUSTIFICATION FOR USNM SPECIMENS:** explain why the requested USNM specimens are essential to the completion of your project

**3 - SAMPLING:** identify which tissues you intend to sample, or which body regions will be damaged, and what parts, preparations, extracts or derivatives are to be returned to NMNH (please consult relevant NMNH staff prior to completing this section)

I have read, understand and agree to comply with the NMNH and Department of Invertebrate Zoology *Genetic Resources Policy* as described on the IZ website at <https://naturalhistory.si.edu/research/invertebrate-zoology/specimen-loans/destructive-sampling>. If permission has been granted for sampling or molecular analysis I will comply with sample labelling and electronic dataset submission requirements as described above and on the IZ website.