Nominator and Lab Guideline Update

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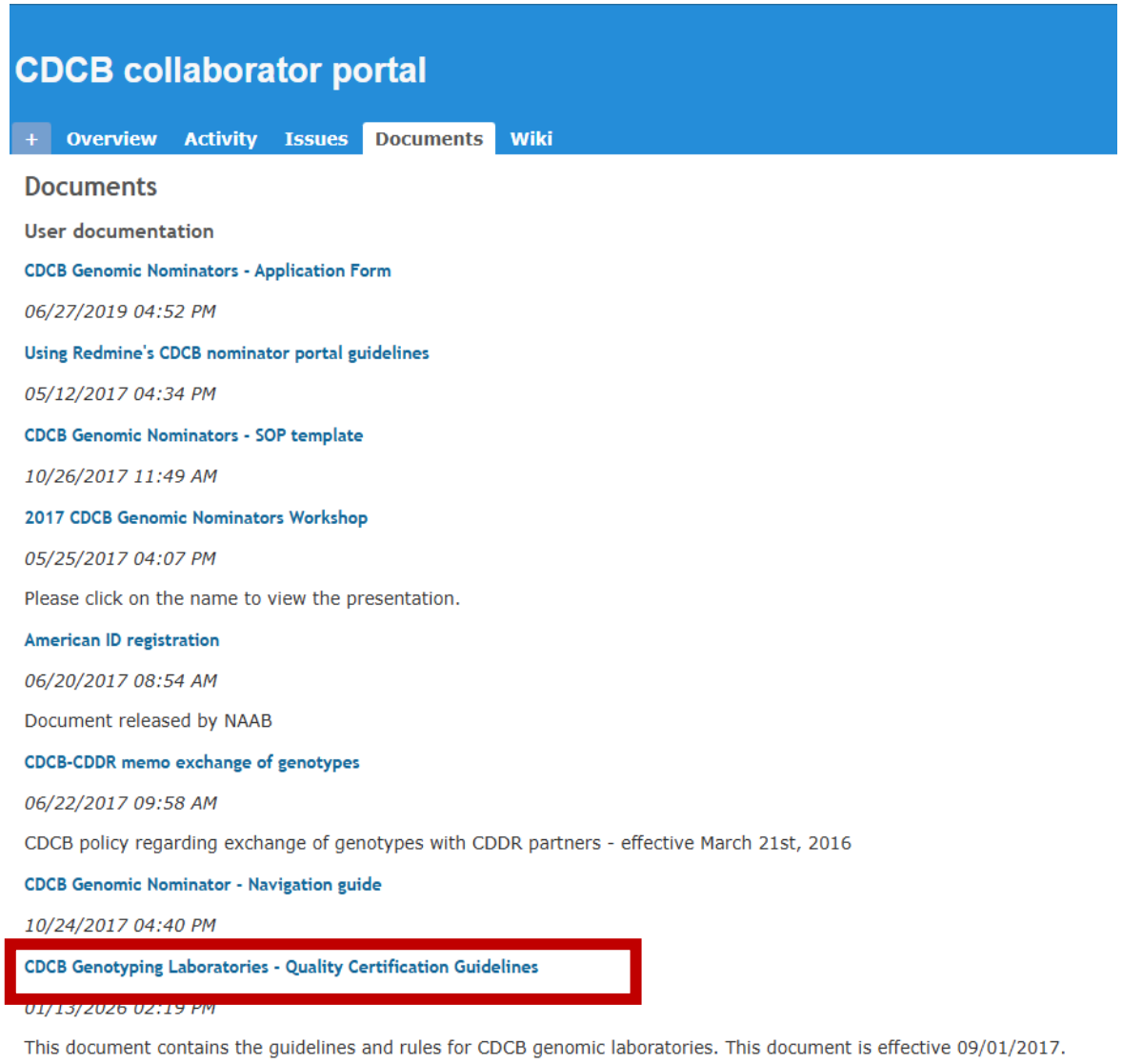
What are the CDCB Guidelines?

- The CDCB guidelines were developed to define rules and responsibilities of Nominators and Labs.
- Consists of:
  - Core Requirements
  - Performance Metrics
  - Procedural Flow of Certification Process
  - Certification Process
  - Certification Status
  - Status Review

Where to Find Them

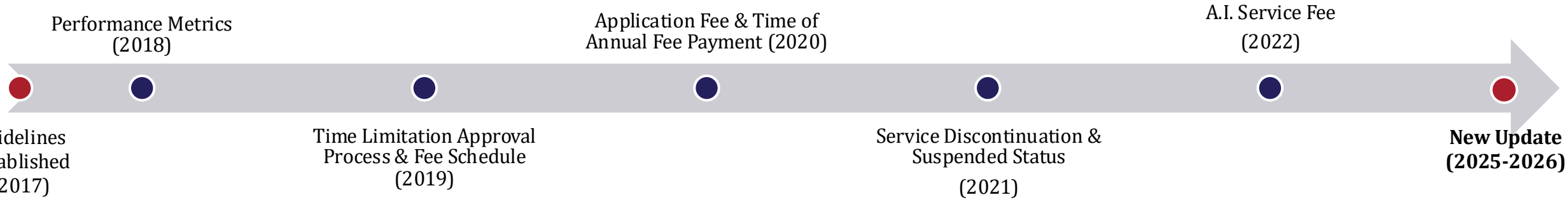
- Redmine: Collaborator
- Document tab



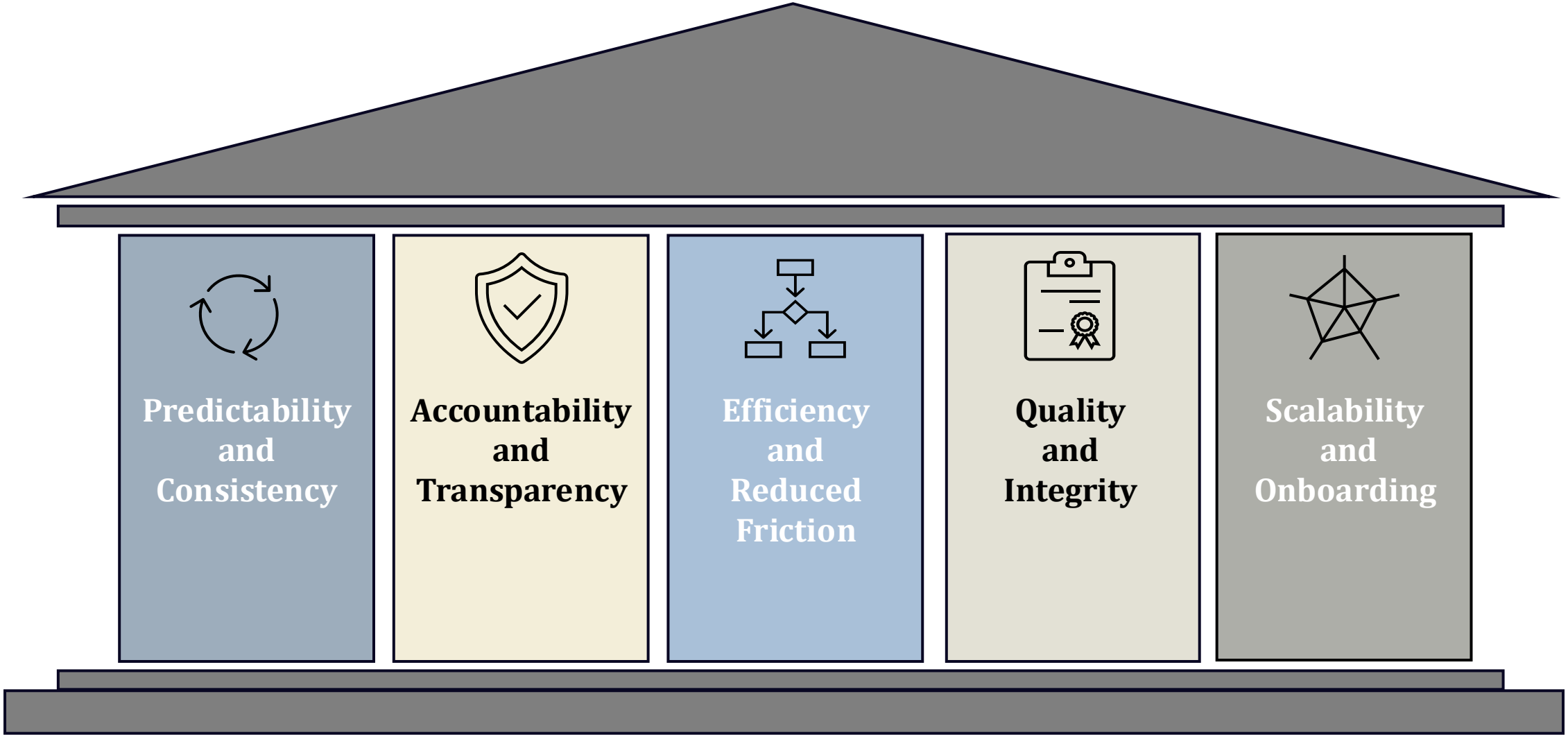
Background

- The original guidelines were developed in 2017 and have not undergone major updates since
- Experiences from certification and customer service highlighted areas needing clarification
- Updated guidelines provide clearer, more standardized rules for both collaborators and CDCB

Guidelines Updated Timeline



Why Clear, Standardized Rules Matter



Note

- The latest guidelines were reviewed in mid-December 2025 and became live mid-January 2026
- The new rules are in effect
- Annual review for 2025 was conducted based on the updated guidelines

Changes in Nominator and Lab Guidelines

- Mark and logo guidelines
- Annual fee

Nominator

- Minimum number and frequency of nomination and genotypes
- Monthly Report Card
- Certification Status

Nominator & Lab

- Site and Technology Disclosure

Lab

Nominator Guideline Update

Mark and Logo Guidelines

Each mark serves a distinct purpose in the visual representation of CDCB's brand identity. This document outlines the individual use for each logo.

Corporate Logo

Used for promoting strategic partnerships with the Council on Dairy Cattle Breeding.

Represents formal organizational identity and collaborative relationships.

Powered by CDCB

Applied to genetic evaluation results to add transparency for producers.

States that results are produced by CDCB and validated by industry standards.

Quick Turnaround Evaluation

Used by certified providers for expedited genomic predictions. Identifies results that are a snapshot of genomic evaluations for traits of high importance, but not complete genomic evaluations.

Mark and Logo Guidelines

Nominators must follow all recommendations outlined in the Mark and Logo Guidelines when distributing or publishing results.
If not followed:

Side Note: In your next SOP submission, please include an example of how CDCB logos or text options are included in CDCB evaluations that are reported back to customers.

Annual Fee

- The annual fee is invoiced when:
  - A new nominator is certified
  - At the beginning of the year (after annual review)

Old fee = $1,000

New fee = $1,200

Nominator and Laboratory Guideline Update

Minimum Number and Frequency: Nomination

Nominator type	Requirement	Notes
Existing (pre-2026)	1 nomination/month for 7 months	No gaps > 3 months
New (post-2026)	Requirement above + **1,000 nominations/year**	

Minimum Number and Frequency of Genotype Submission

Laboratory Type	Requirement	Notes
Existing (pre-2026)	1 genotype/month for 7 months	No gaps > 3 months
New (post-2026)	Requirement above + 1,000 genotypes/year	

Monthly Report Card

Report Card Release

- Report cards are made available to genomic nominators monthly (First day of the month)
- Two formats (csv and Redmine ticket)

Nominator Reviews

- Using the information in the report cards and supplemental file, nominators review their performance

Explanation + Prevention Plan

- Nominators prepare the explanation and preventive plan for failed metrics reported in the report card

Response Due Within 1 Week

- Nominators provide the explanation and preventive plan
- Done through a Redmine ticket


[redacted] nominator report card - FAILs present, please respond

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Added by CDCBsystems 27 days ago. Updated 23 days ago.

Status:	Closed	Start date:	03/01/2025
Priority:	Normal	Due date:	
Assignee:	[redacted]		

Description

Quote

FAIL NOMINATOR REPORT FOR 2503

The following FAIL metrics were found while reviewing [redacted] nominator report card for run:

- Total genotypes for [redacted] for 2503 : 16383
- FAIL [redacted] Fee code = N

Please note that the report card used to generate this warning is in your "out" directory of the CDCB SFTP server.
Metrics used to determine PASS/FAIL reports are available at: https://redmine.uscdcb.com/projects/cdcb-customer-service/wiki/QC_Metrics_for_Genomic_Nominators
Also note that CDCB expects your feedback on each one of these failures within a week.
Feedback can only be accepted if a registered redmine user responds to this email (do not write below the message "Reply above this line")
Do not hesitate to contact us (open a regular Redmine ticket) if you need further explanations.

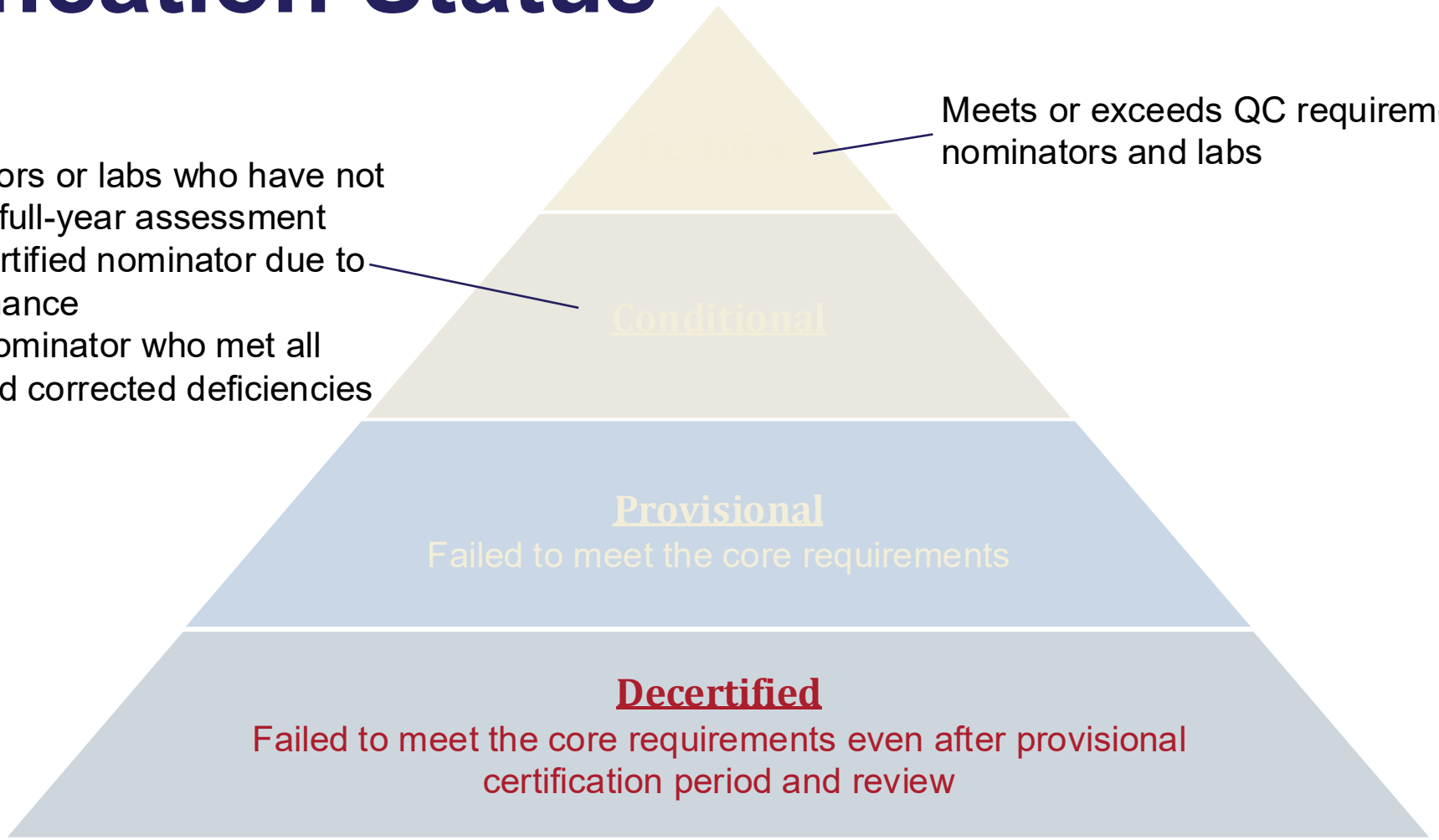
Best regards,
CDCB Staff

Subtasks Add

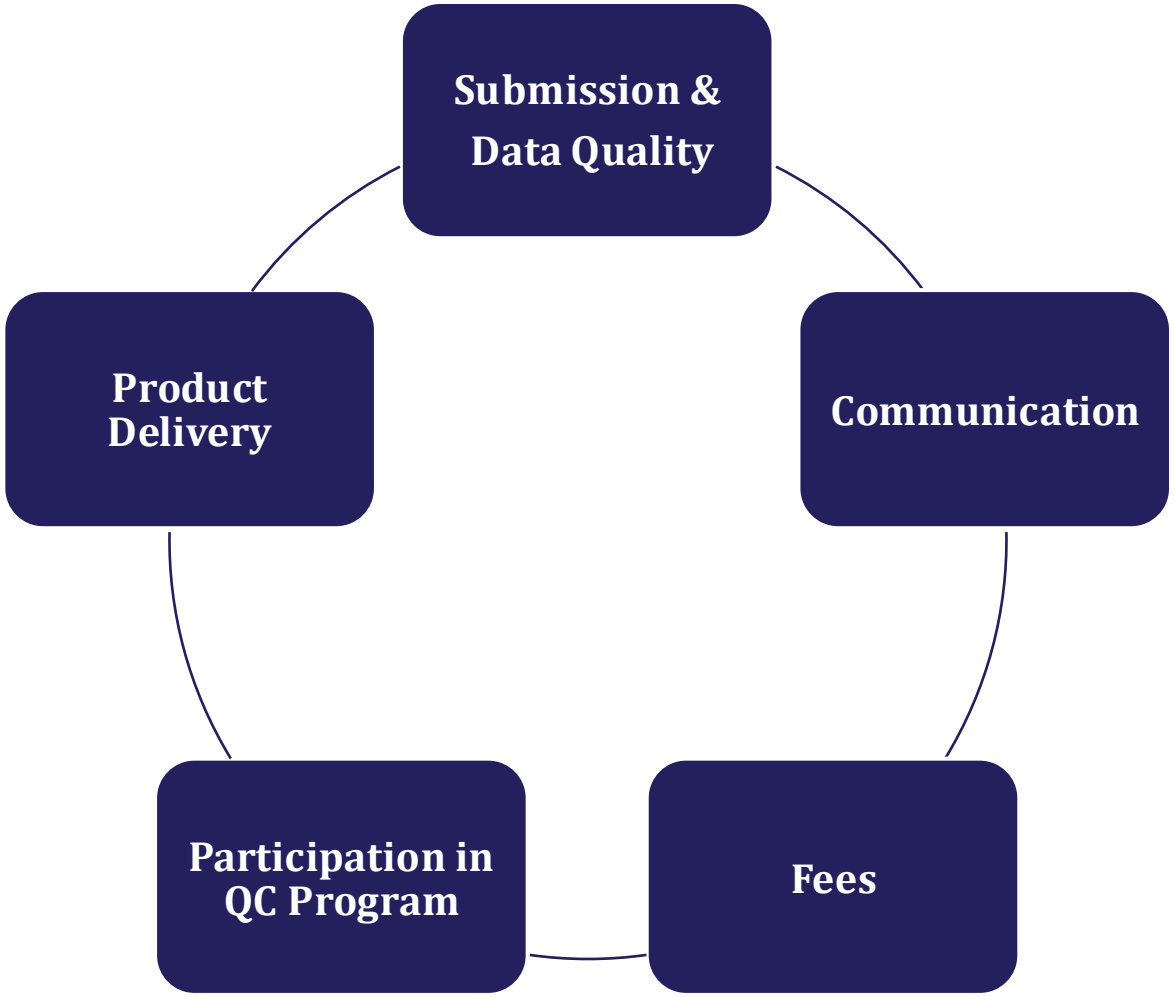
Related issues Add

Certification Status

- New nominators or labs who have not undergone a full-year assessment
- Previously certified nominator due to underperformance
- Provisional nominator who met all conditions and corrected deficiencies



What Affects Certification Status?

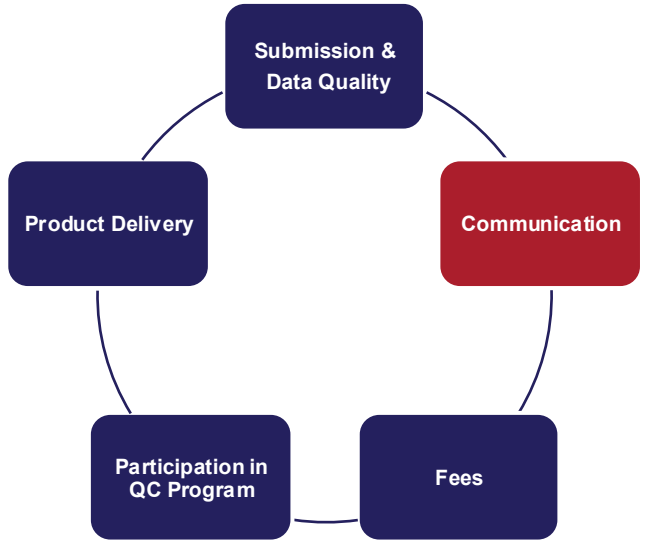


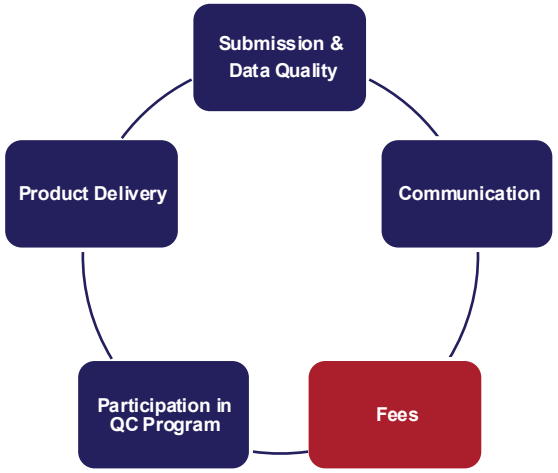
Submission & Data Quality

- CDCB has a very complex system to check for incoming data
- **For nominators**, Format 1(nomination + pedigree) is the main format to add or modify nominations and pedigrees
- **For labs**, sample sheet files and final report files are the required for loading genotypes
- Submission in a proper format and quality of the data are critical elements for data and evaluation accuracy, and integration of data that comes from variety of sources
- Minimum number of submissions

Communication

- CDCB, nominators, and labs work closely together, as nominators and labs are crucial genomic data submitters
- Consistent and proactive communication is a key for smooth operation and keeping a good relationship
- Redmine, Annual Review call, and meeting upon request

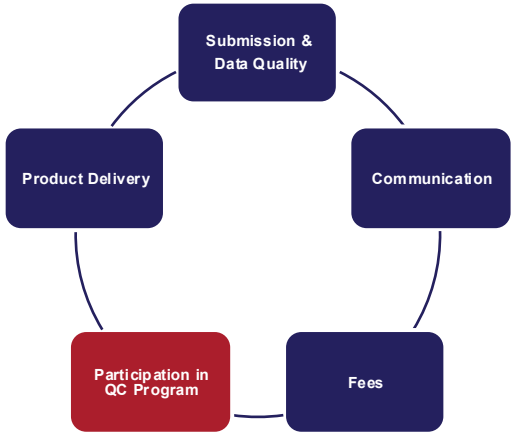




Fees

	Monthly	Annual	Application	Chip Validation	Technology Validation
Nominator	Collected customer fee codes	$1,200	$1,000	X	X
Laboratory	X	X	$1,000 (per technology)	$5,000	$15,000 (Chip validation included)

QC Program Participation



One time

Application → Proficiency Test → Certification Status Notification → Monthly Report Cards → Annual Review

Repeat annually

QC Program Participation (Annual Review)

Monthly Report Card	SOP Submission	SOP and Performance Review	Preliminary Report Card	Conference Call	Final Report Card
Feedback (reason, plan to improve) on failed metrics to CDCB within 1 week after Redmine ticket is generated.	Any changes in operations and updates from previous year should be added. Submitted by due date.	CDCB and Brevitas jointly conduct SOP and performance review and summarize in preliminary report card.	Sent to each nominator/lab at least 1-2 weeks prior to scheduled conference call.	Discussion about topics in the report and exchange any other necessary information.	Sent to each nominator/lab within 1 month of conference call. Based on preliminary report card and conference call discussion.

Product Delivery *(Nominator only)*

- Delivering CDCB products in a timely manner to the end customer is also a very important task for a nominator
- Brand mark should be included
- The product delivery follows CDCB's publication rules
- A publication rules proposal will be discussed tomorrow

Certificate Diagrams

The flow charts clarify how nominators progress from application to certification, how performance is evaluated annually, and how issues are handled through Conditional, Provisional, or Corrective and Preventive Action Plan (CAPA) pathways.

- Nominator Certification Diagram
- Lab Certification Diagram

Conditional and Provisional Status (changes)

- Conditional Status <2 times in 5 years or <3 times in 10 years
- Provisional Status <1 time in 5 years or <2 times in 10 years

- Nominators and labs that received the Conditional and Provisional Status more than the numbers defined above will be decertified without CAPA option

- Once the organization is decertified, they can only re-apply after a 2-year of suspension period

Decertification Appeals

- An appeal must be filed within 10 business days from the date of the Notice of Decertification is issued
- Appeal should include:
    1. Report or letter that explains why the reviewer's decision should be reconsidered
    2. Corrective and Preventive Action (CAPA) plan that addresses the identified issues for the next 3 months (probation period)
- 3 months of probation period is required to regain provisional status
    - During this period, the organization's performance will be closely monitored
    - Monthly review meetings will be scheduled with CDCB

Laboratory Guideline Update

Site and Technology Disclosure

- Starting in 2026, CDCB added new requirements for labs that submit data to CDCB from locations that are **not** listed in Redmine
- **Requirements:**
  1. Laboratory Site and Technology Disclosure form (every year)
  2. ISO 17025 (or equivalent)
  3. CDCB Collaborator Information Form
  4. The satellite sites should use the same technology that main site is certified in

Site and Technology Disclosure

- **<u>If the new site(s) do not have an ISO 17025 yet:</u>**
  - Thanks to Christy Neis (GenVis) for raising the question!
  - CDCB requires proof that the ISO accreditation process has been initiated (auditor confirming engagement, payment receipt, email confirmation, etc.)
  - If the new site fails to obtain the ISO within one year, data from the site will not be accepted until the ISO is obtained

Summary

- As we continue to increase the number of collaborators, it is important to have clearly defined rules.
- Requirements, responsibilities, processes, and rules are described better, therefore there would be much less confusion.
- It is easier to detect issues and guide collaborators on the right track.
- All collaborators are treated equally because there is no wiggle room for subjective decisions.

Thank you for listening!

Any questions?