Guideline for Donors of USP Reference Standard Candidate Materials (Effective October 10, 2022)

USP's Reference Standard program relies on the generosity of donors, who, as experts in the field, provide high-quality candidate materials intended for use as official public standards. This guidance document describes the general USP requirements for such materials. (In addition to this, USP specifications for a particular material are provided to potential donors at appropriate times.)

1. **Purity-** The minimum purity is dependent upon intended or official uses. Default purity values are listed below, but in special cases, lower-purity materials may be acceptable.
   If used in USP Assay tests (e.g., USP Acetaminophen RS): ≥ 99.5%
   If used in USP Limit tests (e.g., USP Captopril Disulfide RS): ≥ 98.0%
   If used in non-quantitative applications: case-by-case, typically ≥ 95%

2. **Amount-** USP accepts candidate materials in various presentations, most frequently in bulk containers or pre-packaged units (e.g., sealed ampuls). For a first-time reference standard, a minimum quantity is established in consideration of the uses of the reference material, its properties (e.g., hygroscopicity and stability), and the anticipated market demand for it. In the absence of complete information, please discuss with USP representatives to reach a mutually-acceptable quantity for first time materials.

3. **Supporting information**- USP recognizes that the donated material is precious to the donor and to USP. To maintain the integrity of the material, and to ensure its efficient development into an official USP standard, USP requests that the shipment is accompanied by a Certificate of Analysis (C of A), a Safety Data Sheet (SDS), origin information (country and material) and a completed copy of the attached reference material information form.
   Ideally, the C of A includes all pertinent test results and the methods used to generate the results. Inclusion of IR and/or NMR spectra, other physiochemical data (eg. Raman, XRD), as well as stability data, when applicable, in the donated package, assists USP. Information about the likely impurities present in the candidate material, including late-stage process impurities, degradation products, and processing solvents, also aids development of the standard.
   The reference material information form provides USP scientific staff with additional information needed to maintain the high quality of the donated material during evaluation, packaging, and storage, including special precautions necessary for proper handling. USP's experience is that timely receipt of this information saves subsequent USP and donor resources and facilitates the development of the public standards.
   Origin information (requested on the reference material information form) is required. USP requires a BSE-TSE statement. International shipments may require USDA statements.

4. **Post-donation activities-** Upon receipt of a donated bulk, USP sends an acknowledgement letter to the donor and commences the development process, which includes a multi-laboratory evaluation of the material. At the conclusion of the evaluation, USP compiles a summary data package, subdivides and labels the material, and ultimately releases the batch as a new lot of USP Reference Standard. A copy of the summary data package is sent with an acknowledgement letter to the donor. Donors also become eligible for USP's Donor Recognition Program, details of which are described on USP's website

Candidate Material for USP Reference Standard Shipping Requirements

Please include the following in your USP Reference Standard candidate bulk material shipment:

1. Completed USP Reference Material Information Form
2. Certificate of Analysis for specific reference material candidate lot
3. Safety Data Sheet (SDS)
4. Supporting data, spectra (eg. NMR, MS, XRD, IR, Raman, DSC), chromatograms etc.
5. BSE/TSE statement

REFERENCE MATERIAL INFORMATION FORM

1. Reference Material Information

Reference Standard Candidate Name:

_____

_____

CAS Registry Number (if available):_____

Supplier lot/Batch number:_____

2. Supplier Information

Supplier:_____

Contact Name:_____

Phone number: _____ E-mail address:_____

Signature: _____Date: _____

3. Origin of Material - REQUIRED

Country of Origin:_____

Synthetically Derived? ◯ Yes ◯ No

Animal Derived? ◯ Yes ◯ No

Animal Species (if applicable):_____

Animal type/organ/fluid:

_____

Were any animal materials used in the processing of intermediates or final product? ◯ Yes ◯ No

Biologically Derived? ◯ Yes ◯ No

Source (e.g., fermentation, recombinant (provide expression system, e.g., plasmid, *E. coli*, CHO cells)):

_____

Human Derived?

◯ Yes ◯ No

Fluid Type:

_____

Plant Derived?

◯ Yes ◯ No

If yes, Type/Part of plant:

_____

Plant Species (if applicable):

_____

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4. Characterization and Properties of Material	
Basis of Purity or Value Assignment	
☐	*Official USP/NF Method* (USP/NF __, page_____)
☐	*In-House Assay Method*
	☐ Reference Standard used:_
	☐ Number of assay replicates:_
	Comments:
☐	*Mass Balance Method* (% purity = 100 - % impurities as specified below)
	☐ Loss On Drying or Water
	☐ HPLC Impurities
	☐ Residue On Ignition
	☐ Additional Impurities:
Long Term Storage Conditions	
☐	Room temperature
☐	Cool Room (between 8° and 15° C)
☐	Refrigerator (between 2° and 8° C)
☐	Freezer (between -25° and -10° C)
☐	Other_____
☐	Not known
Shipping Conditions	
☐	Ambient
☐	Cold Pack
☐	Dry Ice
☐	Other _____
Directions for Use	
☐	Dry before use Temperature: __°C time: __hrs vacuum:_____ mm Hg:____ desiccant:_____
☐	Do not dry, correct for volatiles (___LOD) or correct for moisture (___KF)
☐	Do not dry, use as-is
☐	Not known
Sample Preparation Recommendations	
☐	Use immediately (solutions are unstable)
☐	Protect from light
☐	Refrigerate
☐	Other_____
☐	Not known

Material Information	
☐	Material is stable under stated storage conditions for _____ years
☐	Material is hygroscopic
☐	Material is air sensitive
☐	Material is light sensitive
☐	Solvents used during the last stage (e.g., reaction, workup, purification): _____
☐	Information regarding salt, solvent, hydrate ratios_____
☐	Information regarding known polymorphs_____
☐	Not known_____

Packaging Recommendations	
☐	Ambient temperature and humidity conditions
☐	Rooms with a reduced relative humidity
☐	Inert gas-filled glove box
☐	Package under low actinic light
☐	Not known_____

5. Shipping Documentation	
☐	Certificate of Analysis (CoA)
☐	Material Safety Data Sheet (MSDS)
☐	Supporting analytical data
☐	BSE-TSE Letter
☐	Harmonized Tariff Schedule (HTS Code) (optional)_____
☐	Free Trade Certificates: (e.g., USMCA and KORUS (US-South Korea))
☐	FDA Product Code (optional) _____

Regulatory Status

Is the Company/facility registered with any regulatory government agency(ies) (e.g. FDA, EU, TGA) or against any industry standard (e.g. ISO, USP, NSF)? ◯ Yes ◯ No

Agency/Standard:_____