

ERMS - AOps Job Aid

Create & Submit an Animal Export



UT Health
San Antonio

Enterprise Research
Management System
(ERMS)

Create & Submit an Animal Export to Another Institution

Principal Investigator will sign in to select the protocol from which the animals will be exported.



Dashboard **Animal Operations** Facilities

Protocols Orders **Transfers** Service Requests Cage Cards Billing Events

Animal Operations > Protocols

Protocols

Click the Animal Operations tab.
You will see the Protocols you are associated with.

Active Pending Activation Pending Transactions Suspended or Lapsed Closed

Filter by ID Enter text to search Export to CSV

Name	PI	Date Modified	Date Approved	Date of Expiration	Cage Cards on Census	Percent Used
PROTO00000002 Development and function of the vertebrate nervous system	Rebecca Simms (pi)	2/24/2021 2:48 PM	2/24/2021	2/26/2025	50	16.7
PROT0201800118 Detection and localization of surgically resectable cancers with a multi-analyte blood test	Rebecca Simms (pi)	6/24/2020 10:11 AM	5/4/2020	5/3/2023	0	0.1

Open appropriate protocol for transfer.



Create & Submit an Animal Export to Another Institution

Approved

Next Steps

View Protocol

Printer Version

Order Animals

Transfer/Export Animals

Report Animal Event

Request Service

Request Inventory

Create Reservation

Reserve Cage Cards

Modify Cage Cards

Update Breeding Information

PROTO00000002

Development and func
nervous system

Approved: 600

Used: 100

On Order: 0

Available: 500

Cage cards on Census: 50

Approval Expiration: 0

Created: 500

Principal Investigator: Parent P

Animal Groups

History

Animal Orders

	Group	Species	# Births	# Weaned	# Culled	# Use
View	Rat-D	Rat	0	0	0	30
View	Mouse-D	Mouse	0	0	0	50
View	Mouse-C	Mouse	0	0	0	20

On Animal workspace, click “Transfer/Export Animals”.

Answer SmartForm appropriately, then click Continue.

Creating New: Animal Order

Basic Information

1. * Select IACUC protocol:

PROTO00000002

...

X

2. * Request type:

☐ Animal Transfer

☒ Animal Export

...

3. * Contact: ?

Rebecca Simms (pi)

...

X

Contact person defaults to the user logged in.



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Export Information

1. Select cage cards: ?

Select the animals by cage card ID you wish to export.

	Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
☐			PROTO00000002	Active		Mouse-Default		
☐	C00000296	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000297	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000298	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000299	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000300	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000301	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000302	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000303	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice
☐	C00000304	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice

0 cards are currently checked.

☒ Add All Checked ☐ Remove All Selected

Filter by top row selections.
Click “Add All Checked”.

☒ Add All Checked ☐ Remove All Selected

Selected cage cards:

Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
C00000300	Room 105	PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice protocols
		PROTO00000002	Active	Mouse	Mouse-Default	0	Simms account for mice protocols

Then, click “Save & Refresh List” to save cards selected and retrieve more cards.



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2. Confirm that each cage must be shipped in an entirely separate crate (note: if multiple cages are shipped in the same crate, they will be divided into separate compartments):

☒ Yes ☐ No [Clear](#)

3. Describe any procedures performed on these animals: ?

Ear clips and blood draws

4. Describe any phenotypes expressed by these strains which may require special consideration when being shipped:

Confirm you are exporting in separate crates.

Answer the next set of prompted questions.

Then click Continue.

✕ Exit

Save

Continue ➔



Create & Submit an Animal Export to Another Institution

Receiving Institution

Provide information about the institution that will be receiving these animals.

1. * Institution name:

ABC Institution

2. * Principal investigator name:

Jane Lee

3. * Principal investigator phone:

718-123-4567

4. * Principal investigator e-mail:

jlee@abc.edu

5. AAALAC accreditation reference assurance number:

6. OLAW assurance number:

Fill in questionnaire about the institution to receive the exported animals.

5. AAALAC accreditation reference assurance number:

6. OLAW assurance number:

7. USDA license:

8. MTA number:

Click Continue to shipping information.

Exit

Save

Continue



Create & Submit an Animal Export to Another Institution

Complete Export Shipping & Vet information.
Then click Finish.

Shipping Information

Provide the following information for coordinating the shipping of these animals

1. * Shipping address:

1 Apple Lane
NY, NY 10002

2. * Vet name: ?

Pat Cisco

3. * Vet phone:

718-456-7890

4. Vet email:

pcisco@vetco.com

5. Other contact name: ?

6. Other contact phone:

7. Other contact e-mail:

8. Requested shipping date:

9. * Export financial account: ?

Simms account for mice protocols

Exit

Save

Finish



Create & Submit an Animal Export to Another Institution

You will be returned to the Animal Export Workspace where you will see the summary of the export information.

Dashboard

Animal Operations

Facilities

Protocols

Orders

Transfers

Service Requests

Cage Cards

Billing

Events

...

Animal Operations > Protocols > Development and function of the vertebrate nervous system > Animal Export-PROTO00000002-Simms (pi)

Pre-Submission

Created: 2/24/2021 4:11 PM

Last Modified: 2/24/2021 4:35 PM

Next Steps

Edit Animal Transfer/Export

Printer Version

Submit

Cancel

Update Documentation

AOT00000031

Animal Export-PROTO000000002-Simms (pi)

Protocol: PROTO000000002

Receiving Institution: ABC Institution

Receiving Vet Phone: 718-456-7890

Shipping Courier:

Shipping Date:

Approval Document:

Attachments: There are no items to display

PI: Rebecca Simms (pi)

Receiving Vet Name: Pat Cisco

Receiving Vet E-mail: pcisco@vetco.com

Estimated Shipping Cost:

Pre-Submission

Animal Welfare

Processing

Reconciliation

Com

Cage Cards

History

Click Submit.



Create & Submit an Animal Export to Another Institution

Submit

By clicking OK below, I certify that I have completed this form as accurately as possible.

1. Additional comments or special instructions:

2. Supporting documents:

+ Add

Name	Modified Date
There are no items to display	

OK

Cancel

Add additional comments, add supporting documents. Click OK.

Dashboard

Animal Operations

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...

Animal Operations > Protocols > Development and function of the vertebrate nervous system > Animal Export-PROTO00000002-Simms (pi)

Export Review

AOT000000031

Animal Export-PROTO00000002-Simms (pi)

Created: 2/24/2021 4:11 PM

Last Modified: 2/24/2021 4:36 PM

Next Steps

View Animal Transfer/Export

Protocol: AOT000000031

Receiving Institution: AOT000000031

Shipping Date: AOT000000031

Approval Document: AOT000000031

There are no items to display

Export Review

Animal Welfare Review

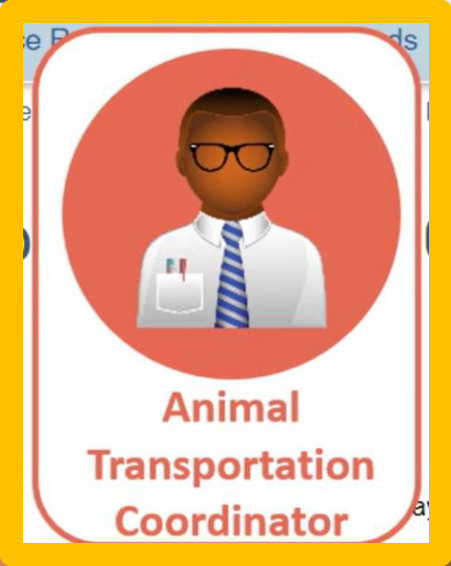
Processing

Receiving Institution

Clarification Requested

Clarification Requested

Export moves into Export Review.



Animal Transportation Coordinator will verify and confirm shipping details from receiving institution.



**For general ERMS-AOps questions, please
contact dlar@uthscsa.edu.**



UT Health
San Antonio

**Enterprise Research
Management System
(ERMS)**