

ERMS - AOps Job Aid

Transfer Animals to Another Investigator



UT Health
San Antonio

Enterprise Research
Management System
(ERMS)

Transferring protocol to another investigator

After signing in as Principal Investigator, go to Animal Ops tab.



From your Animal Operations tab, open the protocol with the animals that will be transferred.

On the Active tab, select protocol to transfer. Protocol workspace will open.

Animal Operations > Protocols

Protocols

Search

Active

Pending Activation

Pending Transactions

Suspended or Lapsed

Closed

...

Filter by ?

ID

Enter text to search

Q

Export to CSV

+

Add Filter

×

Clear All

ID	Name	PI	Date Modified	Date Approved	Date of Expiration	Cage Cards on Census	Percent Used
PROTO00000005	Affects of Sleep Deprivation on Beta-Amyloid Levels	Rebecca Simms (pi)	2/22/2021 7:58 PM	2/22/2021	2/24/2025	15	15
PROTO00000006	Evaluation of the efficacy of organoids in cancer research	Rebecca Simms (pi)	2/22/2021 10:02 PM	2/1/2021	2/3/2025	0	0

2 items

◀ page 1 of 1 ▶

10 / page



Transferring protocol to another Investigator

Dashboard | Animal Operations | Facilities

Protocols | Orders | Transfers | Service Requests | Cage Cards | Billing | Events | ...

Animal Operations > Protocols > Affects of Sleep Deprivation on Beta-Amyloid Levels

Approved

Next Steps

- View Protocol
- Printer Version
- Order Animals
- Transfer/Export Animals**
- Report Animal Event
- Request Service
- Request Inventory
- Create Reservation

PROTO00000005

Affects of Sleep Deprivation on Beta-Amyloid Levels

Approved: 200 Approval Date: 2/22/2021
Used: 30 Expiration Date: 2/24/2025
On Order: 0 Created by: Andy Protocol (apa)
Available: 170 Principal Investigator: Rebecca Simms (pi)
Cage cards on Census: 15 Parent Protocol:

Group	Species	# Births	# Weaned	# Culled	# Used	% Used	# On Order	# Available	% Available	Pain Category
View	Rat-D	Rat	0	0	30	15	0	170	85	Pain Category D

Creating New: Animal Order

Go to forms menu | Help

Basic Information

1. * Select IACUC protocol:
PROTO00000005

2. * Request type:
☒ Animal Transfer
☐ Animal Export
Clear

3. * Contact: ?
Rebecca Simms (pi)

4. * Select the fiscal officer required to approve this transfer:
Alfred Financier (afo)

Exit | Save | Continue

Select "Transfer/Export Animals".
Basic Information page will open.

Select "Animal Transfer" under Request type.
Select Fiscal Officer for approval of transfer.

Click Continue.



Transferring protocol to another Investigator

Select cages to transfer to other investigator.

Select “Add All Checked”.

Transfer Information

Select cage cards: ?

Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
☐		PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☒	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☒	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1

2 cards are currently checked.

☒ Add All Checked ☐ Remove All Selected

Selected cage cards:

Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
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0 cards are currently selected

Transfer Information

1. Select cage cards: ?

Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
☐		PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☒	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☒	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1

0 cards are currently checked.

☒ Add All Checked ☐ Remove All Selected

Selected cage cards:

Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
--------------	----------	----------	-------	---------	---------------	----------	---------

0 cards are currently selected

Then, select “Save and Refresh List” to save newly added cage cards.

- You can use filters across the top to search, if needed.
- Search cages by Cage Card ID.
- Select the cages you wish to transfer by clicking the box to the left of their Cage Card ID.

Transfer Information

1. Select cage cards: ?

Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
☐		PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
☐	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1

0 cards are currently checked.

☒ Add All Checked ☐ Remove All Selected

Selected cage cards:

Cage Card ID	Facility	Protocol	State	Species	Per Diem Type	Capacity	Account
C00000048	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1
C00000049	Room 103	PROTO00000005	Active	Rat	Rat-Default	0	725-1

2 cards are currently selected

Newly added cage cards for transfer.



Transferring protocol to another Investigator

Enter Requested Transfer Date.

Selected cage cards.

Protocol	State	Species	Per Diem Type	Capacity	Account
PROTO000000005	Active	Rat	Rat-Default	0	725-1
PROTO000000005	Active	Rat	Rat-Default	0	725-1

2. * Requested transfer date:

2/23/2021

3. Is this an inter-campus transfer?

☒ Yes ☐ No [Clear](#)

4. Have these animals undergone any tests or procedures? ?

☒ Yes ☐ No [Clear](#)

[Exit](#) [Save](#) [Continue](#)

Click YES for inter-campus transfer.

Click "Yes" on Q4 – you will be prompted to provide more information, see below.

Click Continue to move to next page.

5. * Describe the tests and procedures that have been performed on the animals to be transferred:

Identification and blood draws.



Transferring protocol to another Investigator

Click YES to indicate transferal of animals to another PI.
Q2 – click Ellipsis to select the destination PI.

Click on the person the protocol transfer is going to.
Click OK.

Transfer Destination

Please indicate under whom the cages will now be listed.

1. * Are you transferring these animals to another PI?

☒ Yes

☐ No

[Clear](#)

2. * Select destination PI:

...

Select Person

Filter by

Last

Go

Clear

Advanced

1-3 of 3

Last	First	Organization
☐ Administrator	System	Huron Consulting, Inc.
☐ Bivens (pi2)	Tom	Huron Consulting, Inc.
☐ Bloggs (pi4)	Joe	Oncology

1-3 of 3

OK

Cancel

Click Continue.

✕ Exit

💾 Save

Continue ➡



Transferring protocol to another Investigator

Created: 2/23/2021 12:39 AM
Last Modified: 2/23/2021 1:14 AM

Next Steps

Edit Animal Transfer/Export

Printer Version

Submit

Cancel

Order Type: Animal Transfer

Initial PI: Rebecca Simms (pi)

Receiving PI: Tom Bivens (pi2)

Receiving Facility:

Date Requested to Transfer: 2/23/2021

Order Contact: Rebecca Simms (pi)

Initial PI:

Receiving PI:

Receiving Facility:

Case:

Pre-Submission

Transfer Review

Process

Clarification Requested

Cage Cards

History

Filter by ? ID

Enter text to search

Export to CSV

+ Add Filter

✕ Clear All

ID	State	On Census Date	Off Census Date	Facility Floor Building	Per-Diem	Per Diem Account	IACUC Protocol	Strain Weight
C00000046	Active	2/22/2021		Room 103	Rat-Default	725-1	Affects of Sleep Deprivation on Beta-Amyloid Levels	
C00000047	Active	2/22/2021		Room 103	Rat-Default	725-1	Affects of Sleep Deprivation on Beta-Amyloid Levels	

2 items

page 1 of 1

10 / page

Animal Transfer workspace appears with the cage card to be transferred listed.

Click SUBMIT to submit protocol to transfer PI.



Transferring protocol to another Investigator

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 any additional comments or instructions.

Click OK.



Transferring protocol to another Investigator

Dashboard

Animal Operations

Facilities

Protocols

Orders

Transfers

Service Requests

Cage Cards

Billing

Events

...

Animal Operations > Protocols > Effects of Sleep Deprivation on Beta-Am

AOT00000046

The state has moved to Receiving PI Review.

Help

Receiving PI Review

Created: 2/23/2021 12:30 AM

Last Modified: 2/23/2021 1:16 AM

Next Steps

View Animal Transfer/Export

Printer Version

Animal Transfer-PROTO00000005-Simms (pi)

Order Type: Animal Transfer

Initial PI: Rebecca Simms (pi)

Receiving PI: Tom Bivens (pi2)

Receiving Facility:

Date Requested to Transfer: 2/23/2021

Order Contact: Rebecca Simms (pi)

Initial Protocol: PROTO00000005

Receiving Protocol:

Receiving Account:

Cage Cards: There are no items to display

Pre-Submission

Transfer Review

Processing

Complete

Clarification Requested



Transferring protocol to another Investigator

Last step is for the destination PI to accept the animal transfer.

The screenshot displays a web application interface for animal operations. The top navigation bar includes tabs for Protocols, Orders, Transfers, Service Requests, Cage Cards, Billing, and Events. The main content area is titled 'Animal Operations > Protocols > Affects of Sleep Deprivation on' and shows a 'Receiving PI Review' section for a transfer protocol. The protocol ID is AOT00000046, and the transfer ID is 0000000005-Simms (pi). The 'Receiving PI' is Rebecca Simms (pi), and the 'Initial Protocol' is PROTO00000005. The 'Receiving Facility' and 'Date Requested to Transfer' are also listed. A workflow diagram at the bottom shows the process: Pre-Submission -> Processing -> Complete. A 'Clarification Requested' box is shown below the 'Pre-Submission' step, with an arrow pointing back to it. The 'Principal Investigator' is highlighted with a blue box and a circular profile picture of a man with glasses and a tie.

Receiving PI Review

Created: 2/23/2021 12:39 AM
Last Modified: 2/23/2021 1:16 AM

Next Steps

[View Animal Transfer/Export](#)

[Printer Version](#)

Animal Transfer

AOT00000046

Order Type:
Initial PI:
Receiving PI:
Receiving Facility:
Date Requested to Transfer:

Order Contact: Rebecca Simms (pi)
Initial Protocol: PROTO00000005
Receiving Protocol:
Receiving Account:
Cage Cards: There are no items to display

Principal Investigator

Pre-Submission → Processing → Complete

Clarification Requested



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



UT Health
San Antonio

Enterprise Research
Management System
(ERMS)