

A practical guide

InfoEd RMS Animal Care and Use Module

Introduction

Welcome to the online InfoEd Global Research Management System (RMS) for ULEthbridge! The InfoEd RMS is where faculty members and professional librarians develop proposals in conjunction with ORIS, submit research proposal forms, apply for internal grants (such as the University of Lethbridge Research Fund), track proposal approvals, manage funds for successful applications, and if you are reading this, submit animal ethics protocols for review and approval!

There are four modules in the InfoED RMS system:

1. SPIN funding database
2. Proposal Development/Proposal Tracking
3. Post-award management
4. Animal ethics application and management

This guide provides details on how to submit animal ethics applications, amendments, and reports using the animal care and use module.

Please see [here for the guides to the other modules](#).

Troubleshooting: If you have questions about the InfoEd RMS that are not covered in this user guide, please contact oris.internal@uleth.ca for assistance.



Please note: The screenshots in this document may not precisely match what you see. This may be due to a variety of reasons, such as software updates, different browsers and/or window sizes, etc.

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2. Accessing the InfoEd Research Management System

Please follow the access instructions based on your role:

2.1. FACULTY MEMBER WITH A ULETH SINGLE-SIGN-ON:

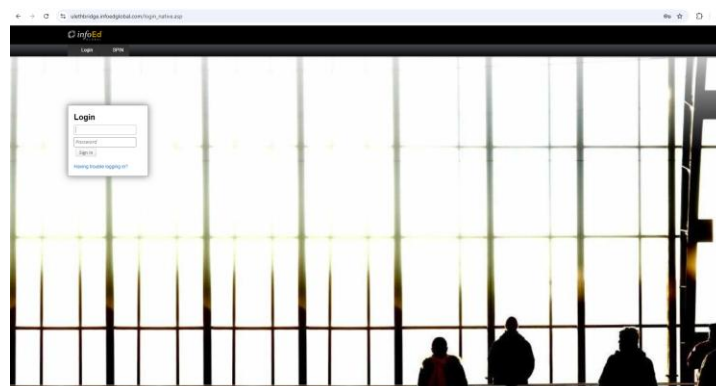
- Navigate to the webpage <https://ulethbridge.infoedglobal.com/>
OR
You can type: [go.uleth.ca/rms](https://ulethbridge.infoedglobal.com/) into any browser to access InfoEd as well.
- If you are already logged in through single-sign on (SSO), you will open the following page:

- If you are not logged in through SSO, you will be re-directed to the ORIS (Office of Research and Innovation Services) InfoEd Sharepoint page. Click on the blue box to enter InfoEd. You may be prompted to enter your uLeth email and password, and complete two-factor authentication.



2.2. TRAINEE/STUDENT/STAFF IN A LAB:

- You may NOT have automatic access to InfoEd. Please have **your supervisor email oris.internal@uleth.ca so you can be added to InfoEd.**
 - You will receive an email confirming you can access InfoEd. Please follow the instructions listed above for faculty members to access the website.
2. If you get the screen below, please email oris.internal@uleth.ca. It indicates something is not working properly with your Single-Sign-On (SSO), and your account will need to be updated.



3. Dashboard View

All users will land on the Dashboard upon logging into the system. You will see a menu bar across the top, a menu list on the left side, and a center panel.

3.1. TOP MENU BAR (RED RECTANGLE)

- **Home.** Brings you back to the original screen and chosen widgets.
- **My Profile.** Opens your profile information on the center panel. You can view your departmental affiliations and assigned roles within the platform, and update email preferences.
- **Locate My Records.** Opens a list in the center panel with every record for which you are listed as Record Owner (e.g., PI). This function does not return results for proposals on which you are named as personnel other than PI (i.e., co-applicant, delegate, or collaborator).
- **Locate Records.** Opens a pop-up box that allows you to use filters to search for any record to which you have access, including records for which you are PI or are named on the project team (as a trainee/delegate for the animal protocols).
- **Calendar.** Opens a calendar in the center panel- not currently used in InfoEd.
- **Messages.** Opens a list of any messages the system has sent to you. Messages act like email in that they can be replied to, forwarded, or deleted. If you complete an action with a system message in InfoEd, it DOES NOT affect the contents of your Office365 Outlook email. **All system messages are also delivered via email to your UofL Outlook account.**
- **Assignments.** Opens a list of tasks or reviews that have been assigned to you. As you complete assignments, they will disappear from your queue.
- **Quick find.** A feature that allows you to search by record number, owner, project title, or sponsor.

3.2. LEFT MENU (GREEN RECTANGLE)

This is a list of all available modules in the portal.

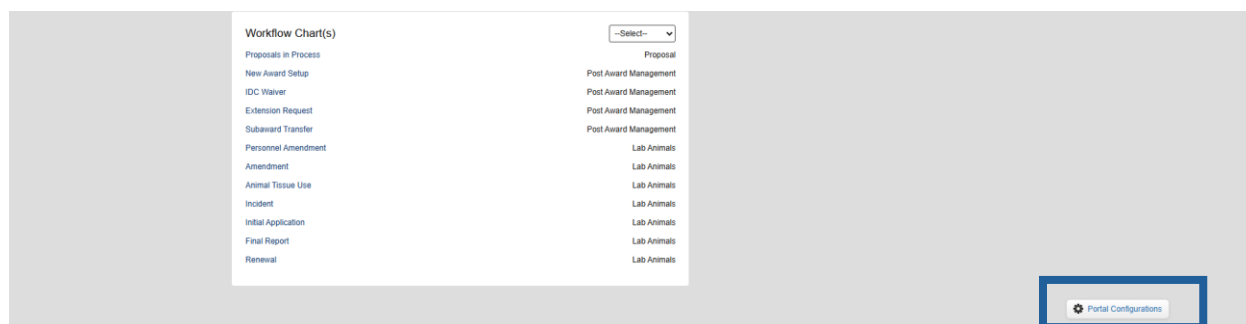
- **Proposal Development.** Opens the proposal-specific functions (e.g., create a research proposal form).

- **Animal Care & Use.** This module opens the compliance application and review functions for animal protocols.
- **Post Award Management.** Opens the funded application-specific functions (e.g., opening research funds, requesting extensions, completing progress reports, etc.)
- **Funding Database.** Opens the SPIN Opportunity database in a new tab in the browser.

3.3. CENTER PANEL (BLUE RECTANGLE)

Every user has a permanent widget called ‘Recent Activity’ (the white text box) displayed in the center panel; this is mandatory and cannot be removed. Widgets can be arranged in one or two columns.

- **Portal Configuration button.** Allows you to display additional widgets and reorganize them on your portal to your liking. It is located at the bottom of the home page. You can select which widgets you want to view.
- See Section 5 below for more information.
 - **For Faculty, we recommend the following:**
 - “PAM & PD/PT Records I am Named On”
 - “Assignments”



4. Configuring the dashboard

All user dashboards are configurable and can be set up as each user prefers. The dashboard consists of “widgets” or tiles that provide a variety of information, graphs, links, etc.

What you can view on your dashboard is controlled by system security. You will only be able to see your items (as a PI) or your department’s items (as Chair), or your Faculty/Schools’ items (as Dean).



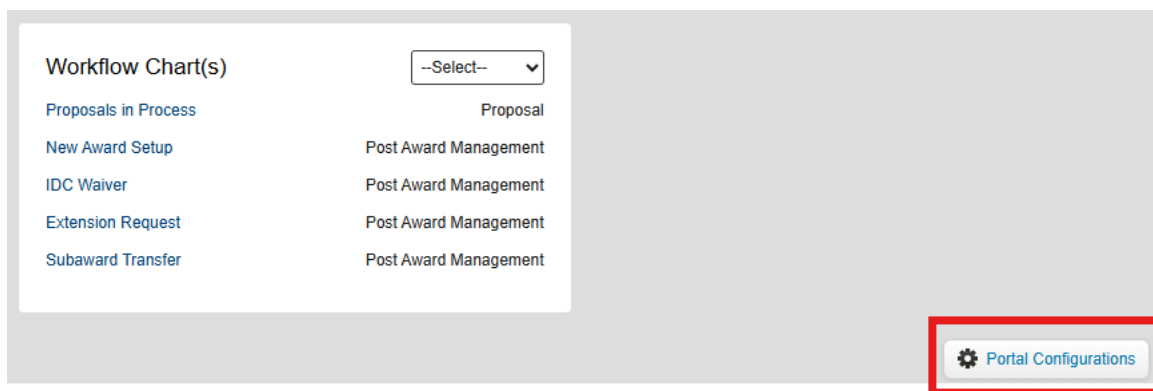
There are two mandatory widgets for every user:

- Recent activity, which lists all submitted proposals.
- WorkFlow Charts, which enable you to see you is reviewing your submitted proposal(s)/fund set up.

These cannot be removed from your dashboard but can be arranged based on your personal preferences.

All items in blue are hyperlinks for easy navigation.

To configure your dashboard, click the **Portal Configurations** button in the bottom right corner.



The Portal User Preferences window opens.

For Faculty, we recommend the following:

- “PAM & PD/PT Records I am Named On”
- “Assignments”

Portal User Preferences

SaveClose

Double Widgets

Drag  to re-arrange display order

Widget Name	Enable/Disable
Assignments	Disable 
Messages	Disable 
SPIN	Disable 

Available Widgets

Widget Name	Infoed	Third Party	Institution
Agreements Expiration With Security	Use		Yes
Bookmarks	Use		Yes
ENT - Meeting Calendar	Use		Yes
Messages Widget	Use		Yes
My Projects	Use		Yes
Proposal Deadlines With Security	Use		Yes
Saved Browse Template	Use		Yes
SMARTS™ Notifications	Use		Yes
SPIN Bookmarks	Use		Yes
SPIN™ Custom Funding Opportunities	Use		Yes
System Messages	Use		Yes
Things to Do Widget	Use		Yes
Up-and-Coming Reviews	Use		Yes

Left Column Widgets

Drag  to re-arrange display order or switch columns

Right Column Widgets

Drag  to re-arrange display order or switch columns

Scroll down to see which widgets are currently active on the dashboard.

Left Column Widgets

Drag  to re-arrange display order or switch columns

Widget Name
 Recent Activity
 Active PD Routes
 Active PAM Routes
 WorkFlow Map

Right Column Widgets

Drag  to re-arrange display order or switch columns

Widget Name

All available widgets are listed in the “**Available Widgets**” column. To select a widget, simply click on the blue **Use** hyperlink for that widget name. Once selected, the widget appears by default in the **Left Column Widgets**.

You can arrange the widgets on your dashboard by clicking and dragging the widget name to rearrange them within the column or move the right (or left) column.

Left Column Widgets

Drag  to re-arrange display order or switch columns

Widget Name
 Recent Activity
 Active PD Routes
 Active PAM Routes

Right Column Widgets

Drag  to re-arrange display order or switch columns

Widget Name	
 Messages Widget	Remove
 WorkFlow Map	

Click **Save** to save the widget changes and return to the dashboard. If you do not like how the dashboard looks, click on **Portal Configurations** again to re-arrange, add, or remove widgets.

5. To Do List and Messages

Things to do are communicated through the system's Routing and Workflow processes.

Whenever something is assigned to you, it will appear in your **Assignments tab** and will remain there until you complete the assignment. You will receive a message under both the **Assignments tab** and the **Message tab**.

When you receive a notice (information only, no action required), it will be a message only.

Your outlook will receive emails from “infoed-noreply@uleth.ca”

5.1. ROUTING AND WORKFLOW

- **Routing and review** – Things to do are assigned automatically in the routing processes. The routing process is triggered anytime a submit button is clicked in the system.

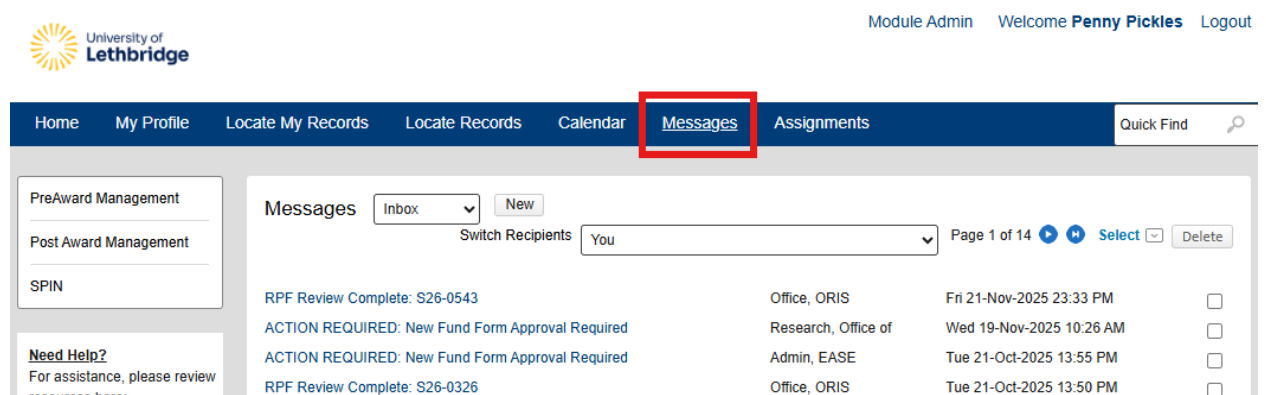
Things to do assigned via a route are completed in the **Reviewer Dashboard** (see Review and Approval section). Once the route is complete, workflow begins. If a trainee submits a protocol, the PI will receive a request to use the Reviewer Dashboard to review the protocol.

- **Workflow** – Workflow forwards records through the system based on status changes. Generally, when a user completes an assignment, the record will move to the next status and the next assigned person. The next status and assigned person are determined by system configurations and cannot be modified by the PI.

5.2. MESSAGES

You will receive a message each time a task is assigned to you or to notify you of something. Messages will be sent to your ULethbridge email address and within the InfoEd system.

To view the message within InfoEd RMS, click on “**Messages**” in the top menu bar.



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Module Admin Welcome Penny Pickles Logout

Home My Profile Locate My Records Locate Records Calendar **Messages** Assignments Quick Find

PreAward Management
Post Award Management
SPIN
[Need Help?](#)
For assistance, please review resources here.

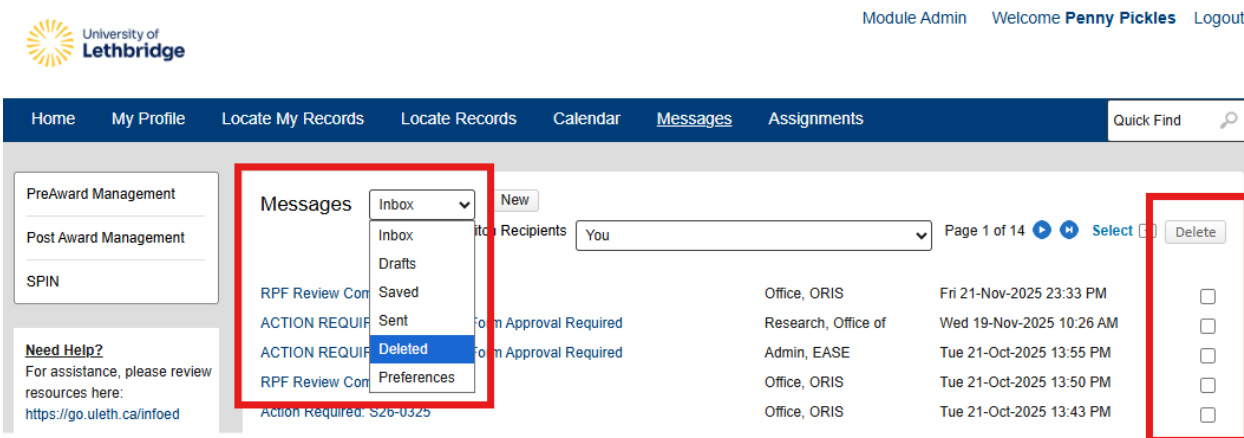
Messages Inbox New
Switch Recipients You Page 1 of 14 Select Delete

RPF Review Complete: S26-0543	Office, ORIS	Fri 21-Nov-2025 23:33 PM	☐
ACTION REQUIRED: New Fund Form Approval Required	Research, Office of	Wed 19-Nov-2025 10:26 AM	☐
ACTION REQUIRED: New Fund Form Approval Required	Admin, EASE	Tue 21-Oct-2025 13:55 PM	☐
RPF Review Complete: S26-0326	Office, ORIS	Tue 21-Oct-2025 13:50 PM	☐

Click on the blue hyperlink text to open the message.



You can delete messages at any time by clicking on the box to the right of the message and clicking the delete button. If you wish to review deleted messages, click on the drop-down list beside Messages and select **Deleted.**



6. Statuses

Items are processed through the system mostly based on statuses, specifically status changes. There are multiple statuses built into the system.

6.1. ANIMAL CARE A& USE STATUSES

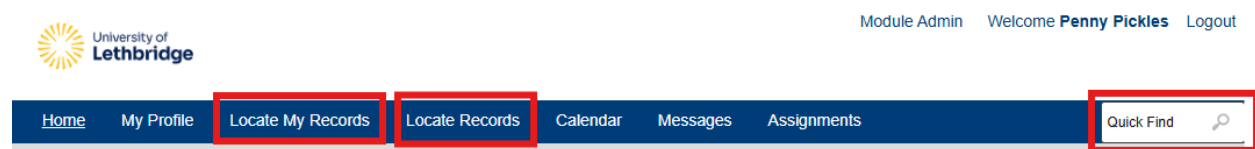
In development	The researcher has clicked on a form option and started a protocol.
With AWC	The protocol is submitted and being reviewed by the AWC.
With Student or PI	The protocol is returned to the PI or student for revisions.
Approved	The protocol is approved.
Closed	The record is closed.

6.2. VIEWING RECORD STATUS

1. Navigate to the protocol. If you are unsure how to do this, please refer to "[Locate a record in InfoEd](#)" for detailed instructions. The last column in the table shows the **general status of the record (in-development OR approved)**. Please note, this is different from proposal development and new fund statuses.

7. Locating a record in InfoEd

InfoEd has three mechanisms for faculty/the PI finding existing records. All are in the top blue bar menu:



7.1. LOCATING AN EXISTING RECORD TO VIEW OR EDIT

7.1.1. Locate My Records

Opens a list in the center panel with every record for which you are listed as Record Owner (record owner = PI). This function does not return results for proposals on which you are named as personnel other than PI (e.g., co-PI or investigator).

7.1.2. Locate Records

Opens a pop-up box that allows you to use filters to search for any record to which you have access.

7.1.3. Quick Find

A feature that allows you to search by record number, record owner, project title. You will only be able to find records where you are the record owner or named as part of the project team.

If you are a trainee listed under “Contact Personnel” on a proposal, you will be able to view and access protocols under the widget “View my Records”.

8. Viewing a Record

8.1. OPENING A RECORD IN VIEW OR EDIT

Once you have your search results, click on the **Record Number** column on the left. This will open a menu that is contextually appropriate for your permissions and type of record selected (see red rectangle).

Hover over the menu item to get another menu with the selection of **Edit** or **View** as appropriate. The record will open in a new window. The search results will remain on the main portal screen “behind” the record window.

8.2. RECORD ACCESS

Records can only be edited by one person at a time. If someone else has the record open for editing, the next person to open it can only open it in “**View**” mode, even though the “**Edit**” mode appears available.

If you select “**View**” mode, even if you are the only one on the record, you will not be able to make changes or submit it.

The “**In Use**” item in the menu shows who currently has the record open. If there is no “**In Use**” menu item, the record can be opened in “**Edit**” mode.

Details					
Records Found: 1.					
User	Number	Title	Last Activity	Time Remaining	Log Out (☐ all)
Pickles, Penny	S26-0543	this is my title	11/20/2025 9:57:30 AM	Unlimited	☐

If another user forgets to close the record and leaves the proposal open, the record will be unlocked automatically after 60 minutes of inactivity.

9. Record Numbering

ULethbridge has established the following format for numbering records:

New Protocols (submitted through InfoEd after Sept 2026):

AWP-YY-XXX

- AWP = Animal Welfare Protocol
- YY = Last two digits of the year
- XXX are auto assigned by the system.

Legacy Protocols (submitted and approved outside of InfoEd before Sept 2026):

AWP-XXXX

10. Which Form Do I Use? ***Please read before starting an application***

Once you navigate to the Animal Care & Use page in InfoEd, please ensure that you are filling out the correct form.

1. From the “Home” tab,
2. Click “Animal Care & Use” on the left.
3. Select the appropriate form (see information below).

You have the following form options. Please read the description beside to confirm that you are completing the correct form.

1

2

3

IMPORTANT NOTES:

- It is important to know if you are working with a **new application** or a **legacy application**. New applications are submitted through InfoEd and have a protocol number formatted **AWP-XX-XXXX** (ex. **AWP-27-0021**). Legacy applications were submitted before September 2026 and approved using the previous review method outside of InfoEd. These will have a protocol number with the format **AWP-XXXX** (ex. **AWP-2434**).
- **All forms can be completed by either the principal investigator (PI) or staff/trainee.** The PI is required to approve all forms before it can be forwarded to the Animal Welfare Committee.
- **To submit almost all forms below** (except #1- Initial Application and #7- Animal Use Exemption), **you will need to know the protocol number.** See Section 7 above to confirm how to locate a protocol and find the protocol number to use to update the protocol.

FORM OPTIONS AND DESCRIPTION:

1. **Initial Application:** Use this form if you are submitting a new protocol. Either the PI or staff/trainee can start the form and add other users under “contact personnel” who will need to access the form.
2. **Amendment:** Use this form to update an InfoEd Initial Application. The protocol number that you enter should be in the format of AWP-XX-XXXX. If it is not, you **MUST** submit a Legacy Submission-Amendment (see option 8 below).
3. **Personnel Amendment:** Use this form to add other faculty/staff/trainees to the protocol. You can give them access to the protocol by adding them as contact personnel, or simply update individuals involved with the project to maintain compliance. You can use this form to update InfoEd applications (protocol number AWP-XX-XXXX) as well as legacy applications (AWP-XXXX).
4. **Renewal:** When your protocol is approaching expiry, you can use this to renew both new applications (protocol number AWP-XX-XXXX) as well as legacy applications (AWP-XXXX).
5. **Incident:** Use this form to report any incidents that occur for both new applications (protocol number AWP-XX-XXXX) as well as legacy applications (AWP-XXXX).

6. **Final Report:** Use this form to submit a final report for protocols that you are finished with, or have reached the final review date. You can use this to submit for both new applications (protocol number AWP-XX-XXXX) as well as legacy applications (AWP-XXXX).
7. **Animal Use Exemption:** Use this form to obtain an exemption from requiring a completed animal ethics initial application. Formally called a tissue use exemption form.
8. **Legacy Submission- Amendment:** Use this form to update a legacy application. The protocol number that you enter should be in the format of AWP-XXXX. If it is not, you MUST submit an Amendment (see option 2 above).
9. **Copy from Existing:** If you are working on a similar application, you can copy an existing application instead of starting from scratch. This can only be completed with new applications completed in InfoEd (protocol number format AWP-XX-XXXX).

11. InfoEd Automatically Saves All Forms and Changes to Forms

Thank you for taking the time to review this guide. This first section asks that you try to minimize creating multiple blank Animal Ethics applications. **You cannot delete a record once you click the buttons under the main “Animal Care & Use” menu.**

1. When you click to open an “Initial Application”, InfoEd automatically saves a copy of the form. To open the form, please click “Locate My Records” in the horizontal blue menu at the top of the page.
2. If you are looking to start a record on an existing protocol, contact oris.internal@uleth.ca first to determine if the record is uploaded into InfoEd. Danika is working hard over the next month, starting in September 2026 to ensure all the existing protocols are correctly uploaded into InfoEd. When the record is created, a form (amendment, renewal, report) is created as soon as you check the record number and click “Select” in the search window.

12. Submit a New Protocol/Initial Application OR Animal Use Exemption Form

All animal ethics forms are accessed in the Animal Care & Use module. From the “**Home**” tab, click “**Animal Care & Use**” on the left. Click “**Initial Application**” to create the application form or “**Animal Use Exemption**” if that is your intended form.

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Welcome Pete Investigator Logout

1 Home My Profile Locate My Records Locate Records Calendar Messages Assignments Quick Find

2 Animal Care & Use

Proposal Development

Post Award Management

Funding Database

Need Help?

For assistance, please review resources here: <https://go.uleth.ca/infoed>

Or contact: oris.internal@uleth.ca

To submit a suggestion, click [here](#)

Record Status Key

Pre-Award / Proposal Development

Animal Care & Use

If you have already clicked one of the options below, InfoEd automatically saved the record. Please click “Locate My Records” in the horizontal blue bar above to resume working on your open application.

Create New

3 Initial Application Amendment Personnel Amendment Renewal

Incident Final Report 4 Animal Use Exemption Legacy Submission - Amendment

Copy from existing

Accessing Records/Reporting

Locate records by using filters Show a listing of All my records

A pop-up window will appear, and the form will load.

12.1. WHAT YOU NEED TO KNOW TO SUBMIT THE INITIAL APPLICATION

Animal Welfare Approval Form - Google Chrome

ulethbridgetest.infoedglobal.com/ComplianceNet/SharedSystems/EForms/Form.aspx?ObjectFormId=3A569BBE-9B29-42E7-81CD-B96E71D2188A&r...

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Lock Form Validate Submit Save

ADMINISTRATIVE INFORMATION

CONTACT INFORMATION

PROJECT PERSONNEL

PROJECT SUMMARY

REPLACEMENT, REDUCTION, REFINEMENT

ADMINISTRATIVE INFORMATION

Protocol Number AWP-26-238

Submission Number AWP-26-238-01

* Project Title

New Protocol Created for.....

1. The **yellow asterisk** indicates a mandatory field. You cannot submit the form without completing those fields. Please note that you will have to complete all or most fields for an application to be forwarded for review.
2. You can **scroll through the full form or click on the tabs** on the left to complete the form section by section.
3. **If you are the staff/trainee- YOU MUST CORRECTLY UPDATE THE CONTACT INFORMATION** (see section 4.2. below).

- a. **For the staff/trainee:** Under the “Scientific Merit, Funding Source & Permits” section, you can select “No funding” to avoid being required to enter dates, or alternatively, ask your supervisor the start and end date of the research supporting this work.
 - i. **For faculty:** If your staff/trainee select “No funding”, you should update this section once the form is forwarded to you.

4. Several sections include a yellow plus sign. You can click on the plus to add more fields.
 - a. If you need to, you also have the option to remove a box if you add another field, but do not need it.

5. You can **generate a PDF of the application** by clicking on the box in the horizontal blue header.
 - a. Please note if you are the staff/trainee, you can submit the form, and it will go to the PI for review. They are able to make comments within the form and return it to the trainee/staff for edits, OR make edits themselves and forward it to the AWC office.

6. **To submit the form:** Once you believe you have completed the form, you must:
 - a. Click “Lock Form.” If there are incomplete fields, a warning will appear, “Incomplete mandatory fields found.”
 - i. Once you click “okay” on the notification, the incomplete fields are highlighted, so you can complete the missing sections and click “Lock Form”

13. Submit a Legacy Amendment for a Protocol approved pre-September 2026

For “legacy protocols” or protocols that were approved outside of the InfoEd system before launch in September 2026, they will look very different from protocols that were started within InfoEd. They will include:

1. Title
2. End date of research
3. CCAC Category of Invasiveness
4. CCAC Purpose of Animal Use
5. Protocol keywords
6. Contact Information (PI, with option to add staff/trainees).
7. Attachments of the previously approved protocol



The legacy amendment form is the only form specific to legacy protocols (protocols approved before October 2026). All other updates can be submitted with the existing forms (personnel amendments, renewals, final report, incident reports).

Example of a legacy record:

The screenshot shows the University of Lethbridge InfoEd system interface. On the left is a navigation menu with 'ADMINISTRATIVE INFORMATION', 'CONTACT INFORMATION', and 'ALL PAGES'. The main content area is titled 'ADMINISTRATIVE INFORMATION' and contains the following fields:

- Protocol Number:** AWP-26-204
- Submission Number:** AWP-26-204-01
- * Project Title:** Example legacy Research Test
- Is this a legacy submission?** ☒
- * Submission Type:** Legacy Submissions
- * Start Date of Research:** 01-Aug-2024
- * End Date of Research:** 31-Jul-2028
- * CCAC Category of Invasiveness:** A. Experiments on most invertebrates or on live isolates (selected)
- * CCAC Purpose of Animal Use (PAU):** PAU 0 – Animals held in breeding colonies that have not been assigned to a particular protocol (selected)
- * Keywords:** Add 5-10 keywords that describe your experiment. test test test test test

13.1. TO SUBMIT AN AMENDMENT FOR A LEGACY PROTOCOL

1. Click “Home” in the horizontal blue bar on the InfoEd main screen -> click “Animal Care & Use” on the lefthand side of the screen -> click “Legacy Submission-Amendment”.
2. The following unaesthetic window will open:
 - a. You can enter the protocol number if you know it, and click “search”.

OR

- b. Just click “Search”, and all the protocols you have access to will appear. You can check the appropriate one you would like to amend.
 - i. **If you are a trainee, and nothing appears, you may need to be granted access. Please email oris.internal@uleth.ca for help.

Add Animal Protocol Close

Select by Number: Search Clear All

Apply Filters

Browse By

Sponsor/Scheme Set	Principal Investigator Set	Primary Location Set	• Species No Species Found
Sponsor Type Set	Investigator Set	Locations Set	
Primary Center/Program Set	Primary Assoc. Dept. Set	Review Board - Select -	
Center/Program Set	PI Department Set	Review Category - Select -	

For the following selections, the range may not exceed 90 days

Agenda Date Range
 to

Approval Date Range
 to

If you click search, you can scroll down to make your selection:

☒ Supervisor Revisions
 ☒ Committee Revisions
 ☒ Expired

☒ Routing
 ☒ Subcommittee Review

☒ Merit Revisions
 ☒ Subcommittee Revisions

Number	Title	Creation Date	PI	
AWP-25-001	How to add a legacy record	08/17/2026 15:22:33	Investigator, Pete	☐
AWP-26-039	Field Studies	07/11/2026 10:43:40	Investigator, Pete	☐
AWP-26-040	Field Studies (obs only)	07/11/2026 11:01:11	Investigator, Pete	☐

3. A form should open that looks like the image below. Please check that there are only four tabs on the left side menu.
 - a. If you incorrectly opened a new protocol with the legacy amendment, or did not select the legacy amendment, you can close the form, let oris.internal@uleth.ca or danika.dorchak@uleth.ca know so they can delete the unnecessary form.
 - b. Please check and confirm that this is for a legacy submission.
4. To complete the form, please see section 3 above on submitting an initial proposal for advice.

ADMINISTRATIVE INFORMATION

CONTACT INFORMATION

AMENDMENT- LEGACY SUBMISSION

ALL PAGES

Protocol Number

WVP-25-001

Submission Number

AWP-25-001-08

Project Title

How to add a legacy record

Is this a legacy submission?

☐

Start Date of Research

End Date of Research

CCAC Category of Invasiveness

☒ A. Experiments on most invertebrates or on live isolates
 ☐ B. Experiments which cause little or no discomfort or stress
 ☐ C. Experiments which cause minor stress or pain of short duration
 ☐ D. Experiments which cause moderate to severe distress or discomfort
 ☐ E. Procedures which cause severe pain near, at, or above the pain tolerance threshold of unanesthetized conscious animals

CCAC Purpose of Animal Use (PAU)

Lock Form

Validate

Submit

Save

14. Submit an Amendment, Personnel Amendment, Renewal, or Final Report

1. Click "Home" in the horizontal blue bar on the InfoEd main screen -> click "Animal Care & Use" on the lefthand side of the screen -> click on the relevant form button

University of Lethbridge

Welcome Pete Investigator Logout

Home My Profile Locate My Records Locate Records Calendar Messages Assignments Quick Find

Proposal Development
Animal Care & Use
Post Award Management
Funding Database

Need Help?
For assistance, please review resources here:
<https://go.uleth.ca/infoed>
Or contact:
oris.internal@uleth.ca
To submit a suggestion, click [here](#)

Animal Care & Use

If you have already clicked one of the options below, InfoEd automatically saved the record.
Please click "Locate My Records" in the horizontal blue bar above to resume working on your open application.

Create New

Initial Application	Amendment	Personnel Amendment
Renewal	Incident	Final Report
Animal Use Exemption	Legacy Submission - Amendment	Copy from existing

Accessing Records/Reporting

Locate records by using filters Show a listing of All my records

2. The following unaesthetic window will open where you select the protocol to update:
 - a. You can enter the protocol number if you know it and click "search".

OR

 - b. Just click "Search", and all the protocols you have access to will appear at the bottom of the window. You can check the appropriate one you would like to amend.
 - i. **If you are a trainee, and nothing appears, you may need to be granted access. Please email oris.internal@uleth.ca for help.

Add Animal Protocol Close

Select by Number: Search Clear All

Apply Filters

Browse By

Sponsor/Scheme	Principal Investigator	Primary Location	• Species No Species Found
Set	Set	Set	
Sponsor Type	Investigator	Locations	
Set	Set	Set	
Primary Center/Program	Primary Assoc. Dept.	Review Board	
Set	Set	- Select -	
Center/Program	PI Department	Review Category	
Set	Set	- Select -	

For the following selections, the range may not exceed 90 days

Agenda Date Range: to

Approval Date Range: to

3. If you click search, you can scroll down to make your selection. Check the box, and click "Select" above the menu.

☒ Supervisor Revisions ☒ Committee Revisions ☒ Expired
☒ Routing ☒ Subcommittee Review
☒ Merit Revisions ☒ Subcommittee Revisions

Number	Title	Creation Date	PI	
AWP-25-001	How to add a legacy record	08/17/2026 15:22:33	Investigator, Pete	☐
AWP-26-039	Field Studies	07/11/2026 10:43:40	Investigator, Pete	☐
AWP-26-040	Field Studies (obs only)	07/11/2026 11:01:11	Investigator, Pete	☐

4. Depending on the form you selected, the correct form should open. Please see the full guide for more information on how to complete the forms. See section 3 above for general instructions on submitting and completing the form.

15. Emails/Notifications after Submission, Revisions, and Approvals

Initial steps to submit a protocol/amendment/report/etc.:

1. Approval Workflow: If a staff/trainee submits, they will receive an email confirming they forwarded the application to the supervisor (PI) for approval.
 - a. If a staff/trainee submits an application/amendment/report, they will receive an email confirming that the application was forwarded to the Supervisor/PI.
 - b. The PI will receive an email asking them to review and approve the application. They can make changes to the application and forward them to the office

OR

The PI can make changes and comments in the application and return it to the staff/trainee so they can make further comments.

 - c. Once the PI forwards the application, all people listed under “contact personnel” will receive a confirmation email.
2. Revisions:
 - a. Once the vet/AWC/subcommittee has reviewed the application, if they require changes, the Ethics Officer will return the application to the Supervisor/PI.
 - b. The PI can view the comments, respond to comments, and edit the application within the form. They can send it back to the ethics office **OR**
 - i. Forward the application to the staff/trainee, who can view the comments, add their own, and make changes. Once the staff/trainee is done, the application will be forwarded to the Supervisor/PI, who can continue to update or forward the application to the AWC Office.
3. Approval:
 - a. Once the protocol is approved, you will receive an email from noreply-infoed@uleth.ca, sent by Danika.
4. If a staff/trainee submits a protocol, the PI will be asked to review and approve.
 - a. To review the protocol, click on the blue link below:

Revision options before forwarding to the Ethics Office:

- b. The PI can make reviewer comments for the staff/trainee if they would like to return the protocol to the trainee for them to edit:
 - c. The PI can edit the form themselves. PLEASE ADD FUNDING SOURCE IF RELEVANT.
 - d. The PI can confirm that no changes are necessary (ONLY IF FUNDING INFORMATION IS UPDATED) and forward the application to the Ethics Office.
- 5. Once an application is with the AWC Office, it may be forwarded for subcommittee review and/or sent for full Animal Welfare Committee review. Please see other ethics resources for more information.

Application revision:

- 1. Once a review is completed, and revisions are required, the office will return the protocol to the PI who has the option to view comments within the protocol, make edits, and/or can forward the application to the staff/trainee. Once comments and revisions are completed, the PI will forward the updated application to the Ethics Office.
- 2. Once the trainee receives the revisions, they will also be able to view comments, view changes made by the PI, and make their own changes.

Once a Protocol is approved:

- 1. The PI and staff/trainee will receive an email and certification confirming the protocol is approved as well as the renewal date. The individuals who are listed under "Contact personnel" will be able to review the renewal date through InfoEd: