


# Transfer a project in ERM

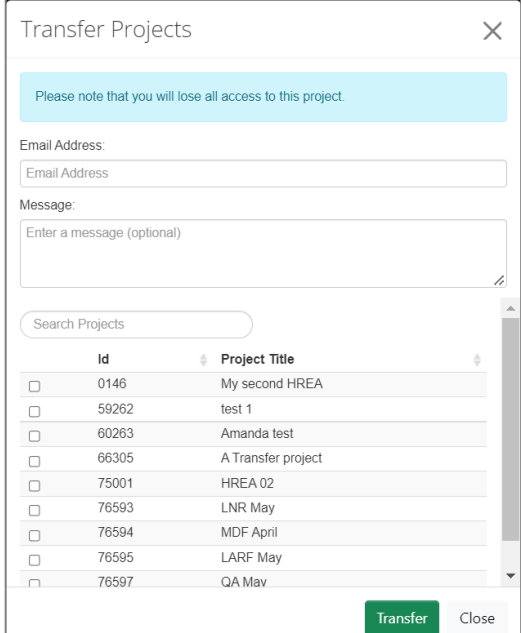
The ERM project owner (ERM user who created the project) can use the **Transfer** function to permanently transfer the project to another collaborator. This may be when a Sponsor creates a HREA application then transfers the project to the Coordinating Principal Investigator (CPI) or when the project owner intends to leave the project and transfers responsibilities to another collaborator in the research team.

If the current project owner cannot be contacted, a [Victoria - Project Transfer Form](#) is available on the Infonetica website Templates page to complete and email to [Infonetica Helpdesk](#).

## Current project owner


### Steps

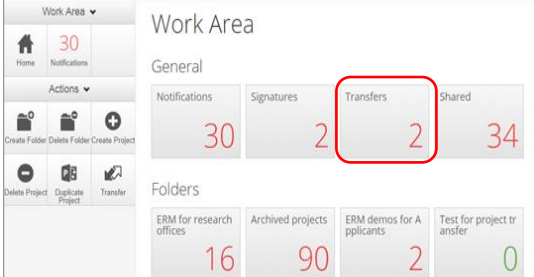
- From the Work Area, select the **Transfer**  button from the Actions pane
- A **Transfer Projects** text box is displayed
- Enter the ensuing project owner's ERM email address and select the relevant project from the list
- Select the **Transfer** button
- The new project owner will receive an email notification regarding the transfer of the project and to log into ERM



Id	Project Title
<input type="checkbox"/>	0146 My second HREA
<input type="checkbox"/>	59262 test 1
<input type="checkbox"/>	60263 Amanda test
<input type="checkbox"/>	66305 A Transfer project
<input type="checkbox"/>	75001 HREA 02
<input type="checkbox"/>	76593 LNR May
<input type="checkbox"/>	76594 MDF April
<input type="checkbox"/>	76595 LARF May
<input type="checkbox"/>	76597 QA Mav

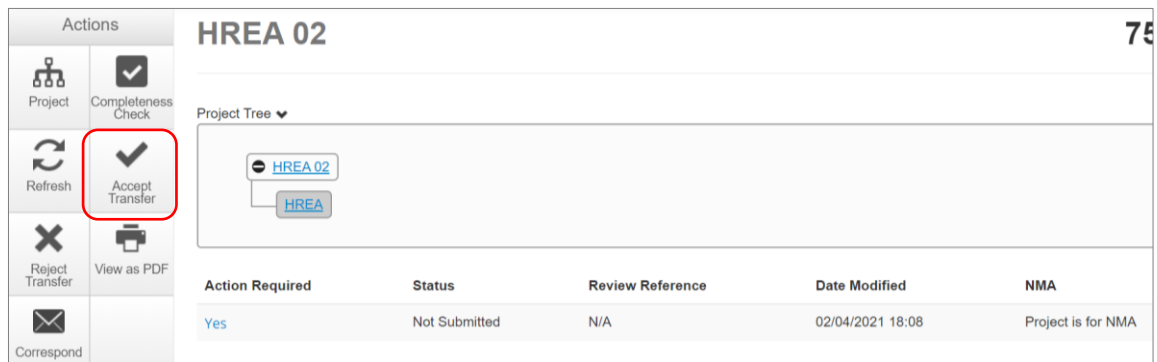
## New project owner

- Log into ERM
- In the Work Area, select the **Transfers** tile
- A list of all transfers will be displayed
- In the relevant message line, select **View Project**  to open the project as read only



Work Area			
General			
Notifications	Signatures	Transfers	Shared
30	2	2	34
Folders			
ERM for research offices	Archived projects	ERM demos for Applicants	Test for project transfer
16	90	2	0

- To accept the transfer, select the **Accept Transfer** button from the Actions



The screenshot shows the 'HREA 02' project interface. On the left, there is an 'Actions' menu with several options: Project, Completeness Check, Refresh, Accept Transfer (highlighted with a red box), Reject Transfer, View as PDF, and Correspond. The main area displays a 'Project Tree' with a dropdown arrow and a tree structure showing 'HREA 02' and 'HREA'. Below the tree is a table with the following data:

Action Required	Status	Review Reference	Date Modified	NMA
Yes	Not Submitted	N/A	02/04/2021 18:08	Project is for NMA

- An **Accept Transfer** text box is displayed
- Select **Yes** to accept the transfer
- Ownership of the project is transferred including all subforms e.g. SSAs and associated documents
- The new owner can access the project from their Work Area

Authorised by the Coordinating Office for Clinical Trial Research

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