IRB Chair Workflow Process in InfoEd

Created by Jeff Cohn
11/09/08
1. Open the email from an IRB Analyst.

The subject line of the email will always read: “Protocol Ready for Chair Review.”

The body of the email will always contain the instructions: “Please view the attachment, noting the protocol number. Then, login to InfoEd and open the corresponding Action Item from your to-do list. Thank you.”

The attachment will contain a letter from the IRB Analyst with the protocol information (institution number, PI, Sponsor) and any message the IRB Analyst chooses to convey to you.
2. Open the attachment to determine which protocol requires review. 
   *Take note of the HSD number.*

3. Click the *Log in* link to get into InfoEd. You may have to enter your ID and password
When login is successful, you are presented with your list of Open Action Items.

3.1. Click the open icon next to the Action Item that matches the HSD number from the email attachment.
The Chair's Action Item contains a Reviewer Dashboard. The Chair can perform the entire review in this Reviewer Dashboard without entering the protocol.
Review each form.

3.2. Click the eyeglass icon 🕒 to view a form.

This will open a new window.
It is good practice to keep this new window next to the Action Item window, side by side or on separate screens.

Form to review

Action Item with Reviewer Dashboard
(Optional) You can add comments about the form or the submission as a whole. If you do not wish to add comments, skip to 3.7

3.3. Click the icon next to a form.

3.4. In the new window, type any comments in the box.

Comments related to the submission as a whole should be made in any of the comments boxes. The IRB Analyst will view these comments and include them in the protocol or in a message to the PI as needed. Note: The PI cannot see these comments, but they are part of the record.
3.5. When finished, click “Save” and “Close.”

3.6. Repeat as necessary for other forms.
3.7. Close the form window when the review is complete.
3.8. Choose a Reviewer Action for each form.

You must either choose “Ok As-Is” or “Action Required.” No forms may be left “Un-Reviewed.”

If you wish to leave the review and finish at another time, you may simply click save and click close to exit from the Action Item. The Action Item will still appear on your to-do list of Open Action Items and the data you already input will be waiting for you when you return. Follow steps 1 – 3.2 when you return to resume your review.
3.9. Check the □ Completed box when finished and then click the □ icon.

Note: the Reviewer Dashboard locks and the buttons turn grey when “Completed” and Saved. If you made a mistake and need to unlock the Reviewer Dashboard, simply uncheck Completed and click the Save icon.
3.10. Click “I am Done” and “Close” to exit from the Action Item.
The Action Item is then removed from the list of Open Action Items and will appear in the list of Completed Action Items.

Click “Completed” in the Action Items menu on the right to view your list of Completed Action Items.
4. Return to the Outlook email sent by the IRB Analyst to communicate to the Analyst that the review is done.

In the future, InfoEd intends to create the ability for the Chair to communicate back to the IRB Analyst within the Action Item.

4.1. Click “Forward.”
4.2. Type the name of the IRB Analyst in the “To:” field.
4.3. Type in the body indicating the review is done.
4.4. (Optional) Type any un-official comments. 
*These will not be connected to the protocol within InfoEd.*
4.5. Click “Send.”

![Email interface showing the message to be sent to an IRB Analyst for protocol review.](image)

**From:** Caruso, Suzanne [mailto:infoed@mssm.edu]
**Sent:** Saturday, November 08, 2008 2:42 PM
**To:** Cohn, Jeffrey
**Subject:** Protocol Ready for Chair Review

Please view the attachment, noting the protocol number. Then, login to InfoEd and open the corresponding Action Item from your to-do list. Thank you.
IRB Chair Cheat Sheet for InfoEd Workflow

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2. Open the attachment to determine which protocol requires review.
3. Click the Log in link to get into InfoEd. You may have to enter your ID and password
   3.1. Click the open icon next to the Action Item that matches the HSD number from the email attachment.
   Review each form.
   3.2. Click the eyeglass icon to view a form.
   (Optional) You can add comments about the form or the submission as a whole. If you do not wish to add comments, skip to 3.7
   3.3. Click the icon next to a form.
   3.4. In the new window, type any comments in the box.
   3.5. When finished, click “Save” and “Close.”
   3.6. Repeat as necessary for other forms.
   3.7. Close the form window when the review is complete.
   3.8. Choose a Reviewer Action for each form.
   3.9. Check the Completed box when finished and then click the icon.
   3.10. Click “I am Done” and “Close” to exit from the Action Item.
5. Return to the Outlook email sent by the IRB Analyst to communicate to the Analyst that the review is done.
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