

IDEATE IS AS EASY AS 1,2,3!

1. ATTACHMENTS TAB TIPS

What to do when IRB Analyst asks you to revise an attached document

- Open the project task on your to-do list
- Comments for documents on the attachments tab will either be on the Review Comments box or next to that document on the Attachments tab
- Make the requested change to the document and save to your desktop. P.S: A tracked copy and a clean copy are needed.
- On the Attachments tab, find the line for the document that needs to be revised
- At the extreme right of that document line, there is a Column titled “New Version” and a link in that column that reads “Upload”.
- Click “Upload”
- A small window appears for you to make an upload (In this window, browse your computer for the needed file and then Upload the file). Upload the CLEAN copy of the updated document.
- The name of the document in the “File name/uploaded date” column will now have the name of your newly uploaded document and the upload date will be the new date of upload.
- In the “Marked Up Version” column, click on the link that reads “Attach”.
- A small window appears for you to make an upload (In this window, browse your computer for the needed file and then Upload the file). Upload the TRACKED copy of the updated document.
- The link in this column will now allow you to view the uploaded tracked document
- This tracked document can be removed by clicking the red “X” in that column if you need to replace it later on.
- In the “History” column immediately to the left of the “File name/ uploaded date” column, a link that reads “view” will appear. This link allows you to view and download all previous versions of the document that have been uploaded.

What to do when you Create a Modification and an approved document needs to be replaced

- On the Livelist, search for the project for which a modification is needed in the “Finder” box
- Click on the ID# of that project and it will open the projects tabs
- On the Lifecycle Event Manager tab, there is a drop-down box labelled “Actions” on the upper right
- Select “Create Modification”
- Click “Go” and click “Ok” on the pop-up message that asks you to verify that you want to create a modification

- On the Attachments tab, all already approved documents will show up under the section titled “Protocol Documents”
- To replace any modified document, find the document line. At the extreme right, there is a column labelled “Actions” with a link that reads “Replace”.
- Click “Replace”
- A small window appears for you to make an upload (In this window, browse your computer for the needed file and then Upload the file). Upload the CLEAN copy of the updated document.
- Doing the above will cause a new line document to appear under the section titled “New Documents”.
- In this “New Document” section, find the “Marked up version” column and click the link that reads “Attach”
- A small window appears for you to make an upload (In this window, browse your computer for the needed file and then Upload the file). Upload the TRACKED copy of the updated document.
- The link in this column will now allow you to view the uploaded tracked document
- This tracked document can be removed by clicking the red “X” in that column if you need to replace it later on.
- In the “History” column immediately to the left of the “File name/ uploaded date” column, a link that reads “view” will appear. This link allows you to view and download all previous versions of the document that have been uploaded.

How to Find Your IRB Approved and Stamped Consent Forms, Recruitment Materials and Other Documents

- On the Live list, search for the project for which a modification is needed in the “Finder” box
- Click on the ID# of that project and it will open the projects tabs
- Click on the Attachments tab on the right side of the project
- The list of all reviewed and approved documents will be on this view.
- To view and download your approved documents, click on the document link in the “File name/ uploaded date” column.
- This will open up a PDF that has the IRB stamp at the bottom right corner of the document
- The stamp has the Protocol number the approval start date and approval end date.