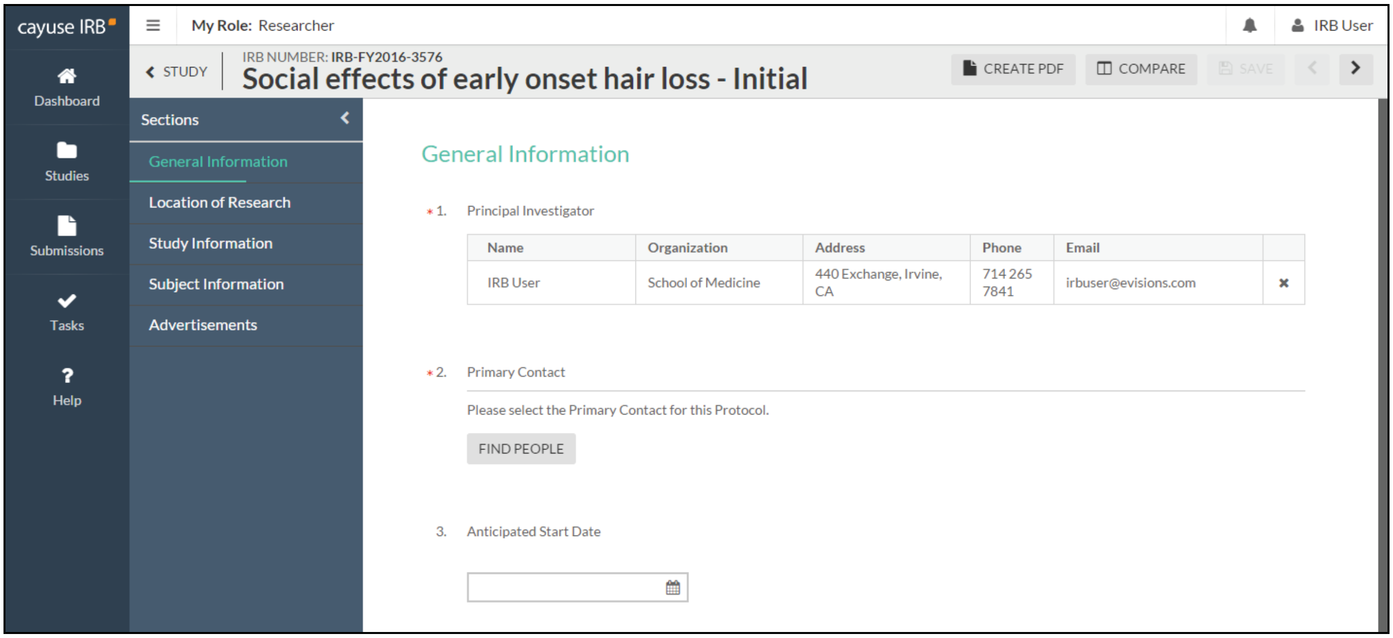
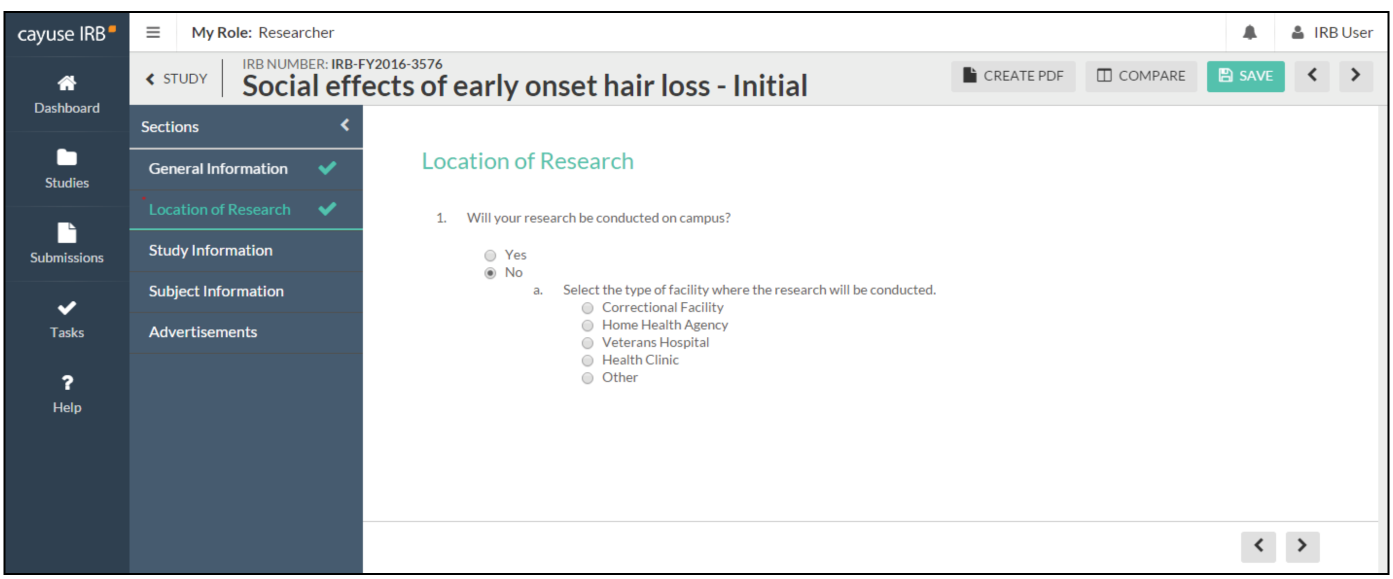
Completing Forms

When you create a new submission for your study, the submission prompts you for the information required by your institution's template for that particular submission type. There may be multiple sections in the template, as well as actions and attachments that you can provide.



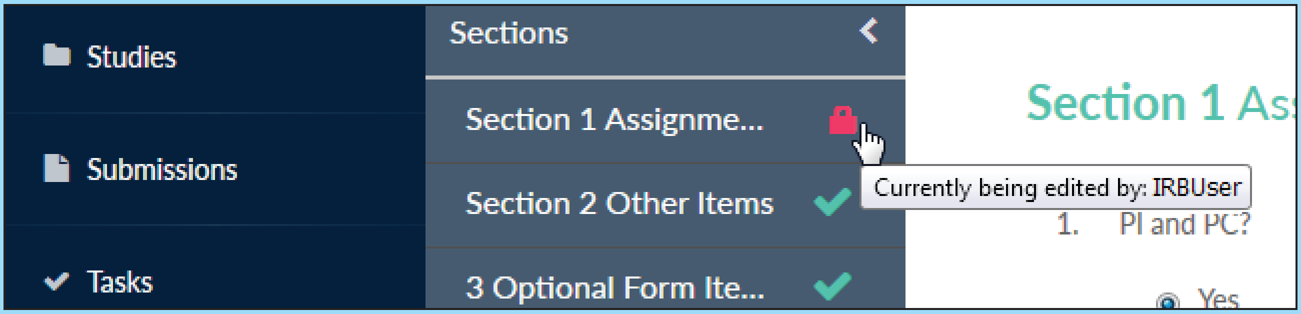
The section you are currently working on appears in the menu in green text. As you provide information, the status bar underneath the section turns green. When complete, the section name has a green check mark to its right. Sections with no required questions are marked complete when you visit the section for the first time.



Use the **<** and **>** buttons to navigate to the previous and next sections. You can also click on a section name in the menu at left to jump to that section.

Simultaneous Users

More than one member of the research team (PI, Co-PI, Primary Contact, or another authorized Investigator) can be working on different sections of a submission at the same time. When another user is currently working on a section, that section will have a red lock icon in the section menu and you will not be able to make edits to that section. You can still work on other sections that are not locked. To see who is currently editing a locked section, hover over the lock icon in the section menu.



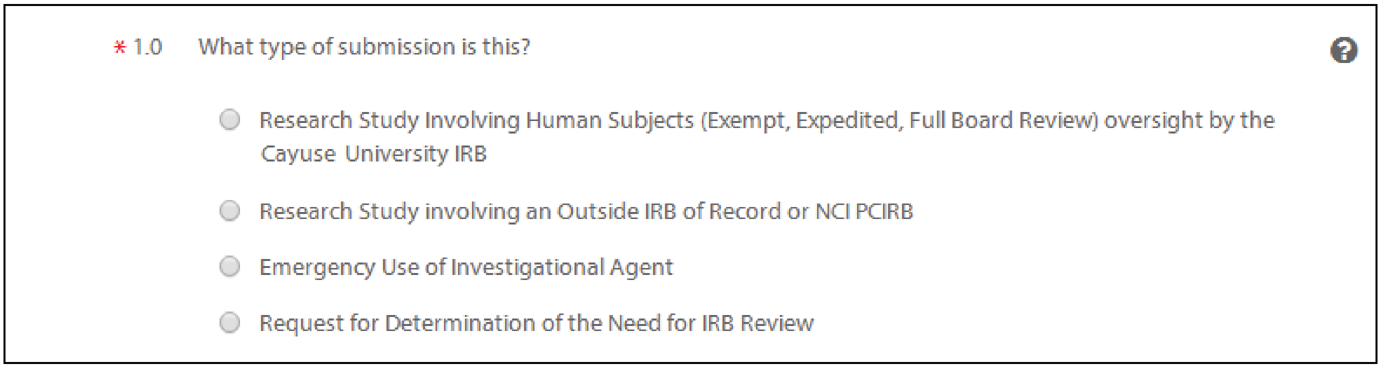
A submission cannot be completed while another user is still editing it.

Types of questions

There are several types of questions that you may see on a submission form:

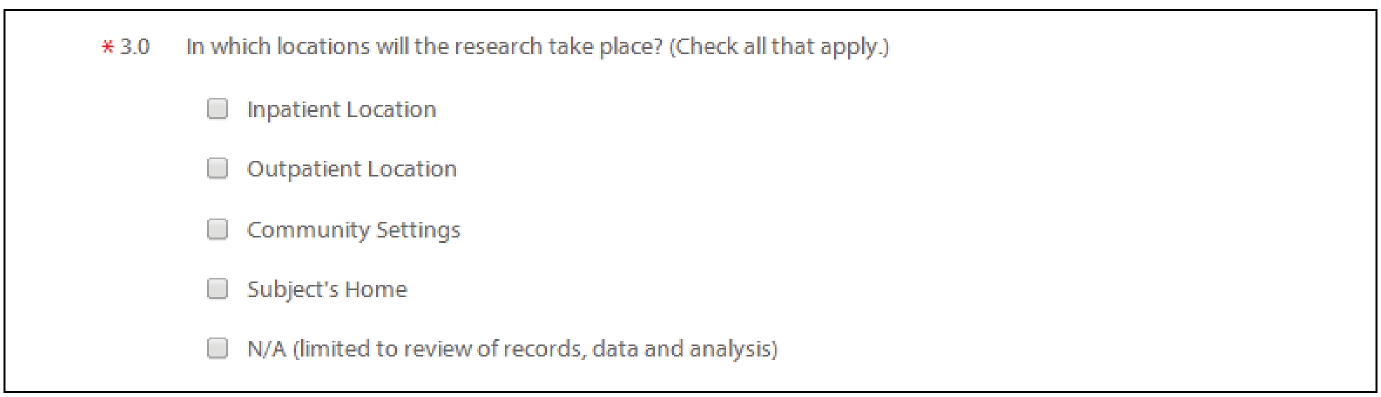
Radio Buttons

Select one of the available options.



Check Boxes

Select one or more of the available options.

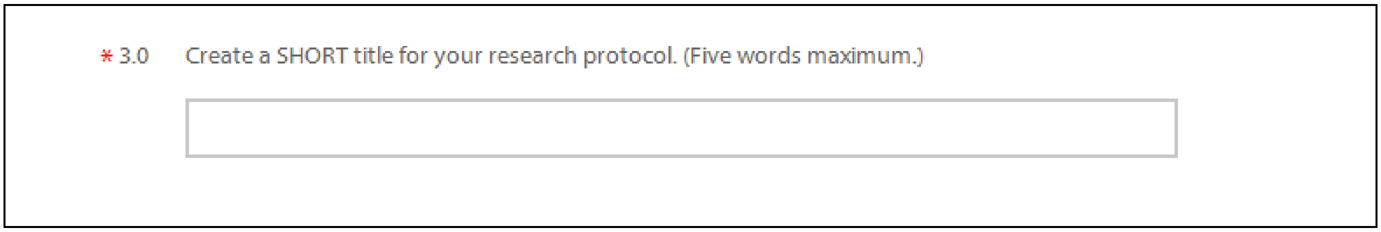


Date Picker

Click the calendar icon to browse for a date.

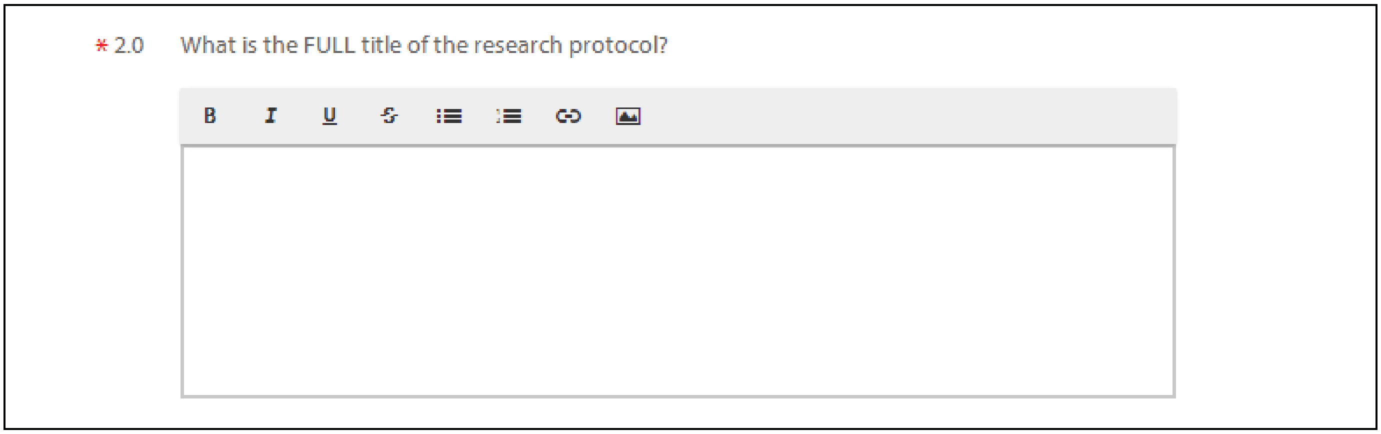
Text Box

A text box provides space for a short answer that does not require a lot of explanation. You can enter multiple lines of text here if needed; the box will expand to fit the text.



Text Area

The multi-line text editor allows you to apply simple text formatting such as bold, italics, underline, strikethrough, bulleted lists, numbered lists, and hyperlinks.



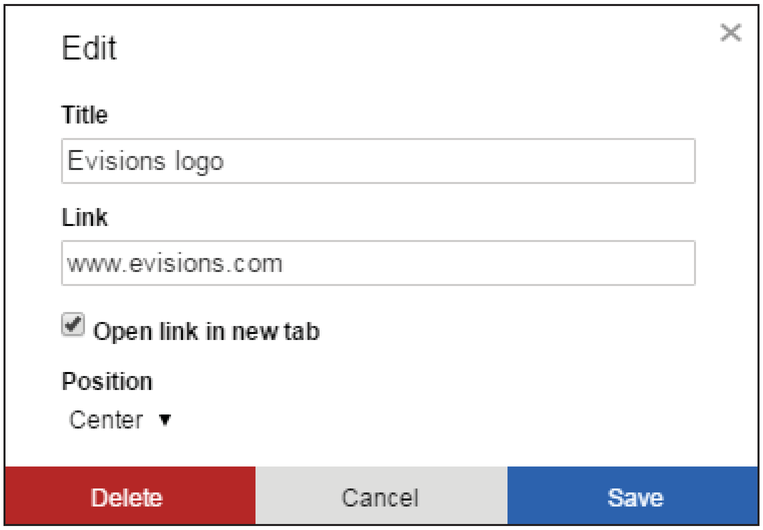
You can also add PNG or JPG images using the image browser. To add an image to the text area, click the icon in the toolbar.

Depending on your browser, you have a choice of three possible image sources:

- **Upload** - Use the **Choose File** button to browse for an image on your computer or from a network location.
- **Web URL** - Paste the URL to an image that is hosted online.
- **Clipboard** - Paste an image that you have copied to your clipboard. Due to browser limitations, his option is only available to Chrome users.

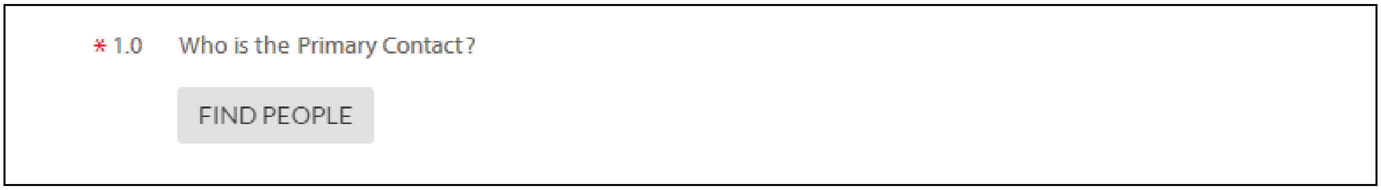
Click **Confirm** to import the image.

Once the image is inserted, you can resize it as needed by clicking and dragging on the corners. When you hover over the image, an **Edit** button appears that opens a dialog where you can add a title for the image, turn the image into a hyperlink, or adjust the image position relative to the flow of text.

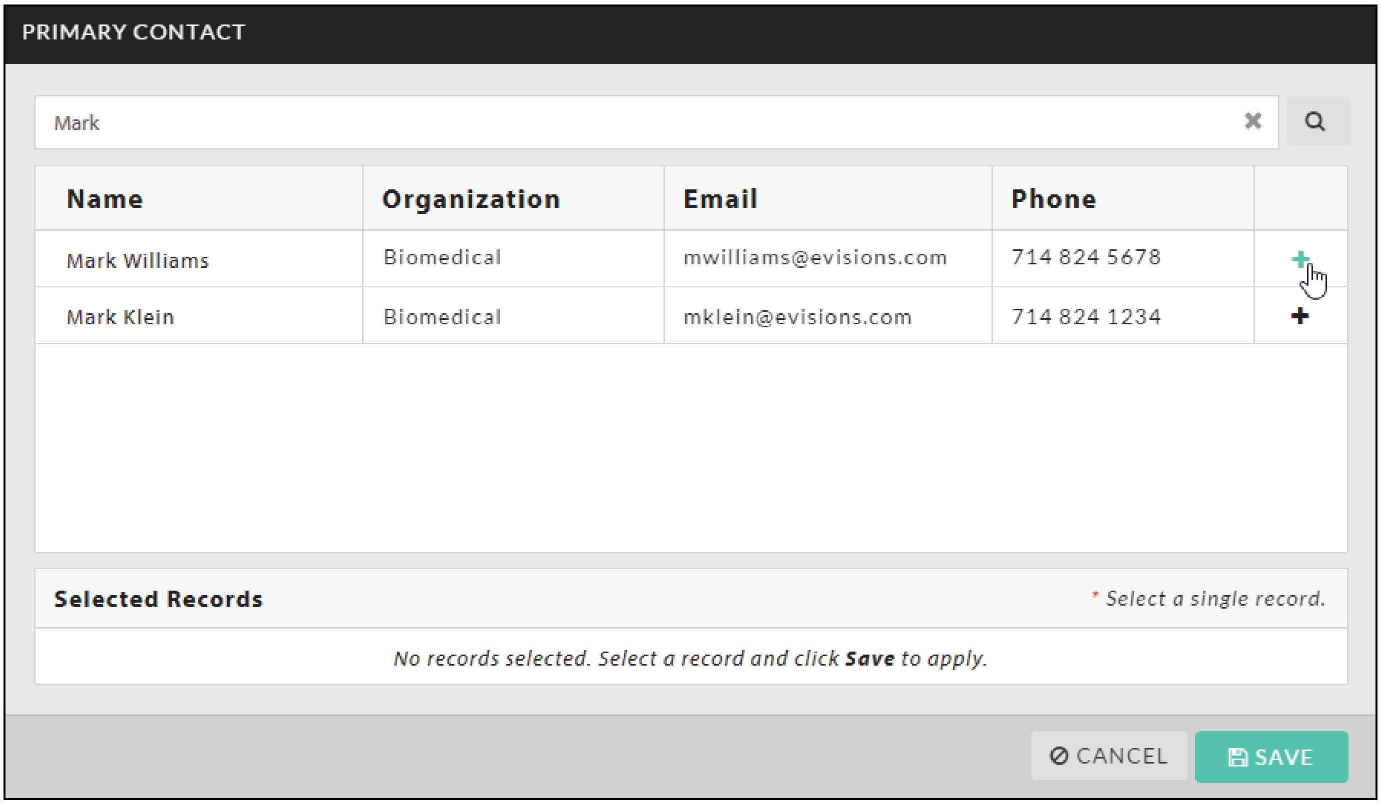


Person and Sponsor Finders

Some fields require a single person, such as the Primary Contact for a study:

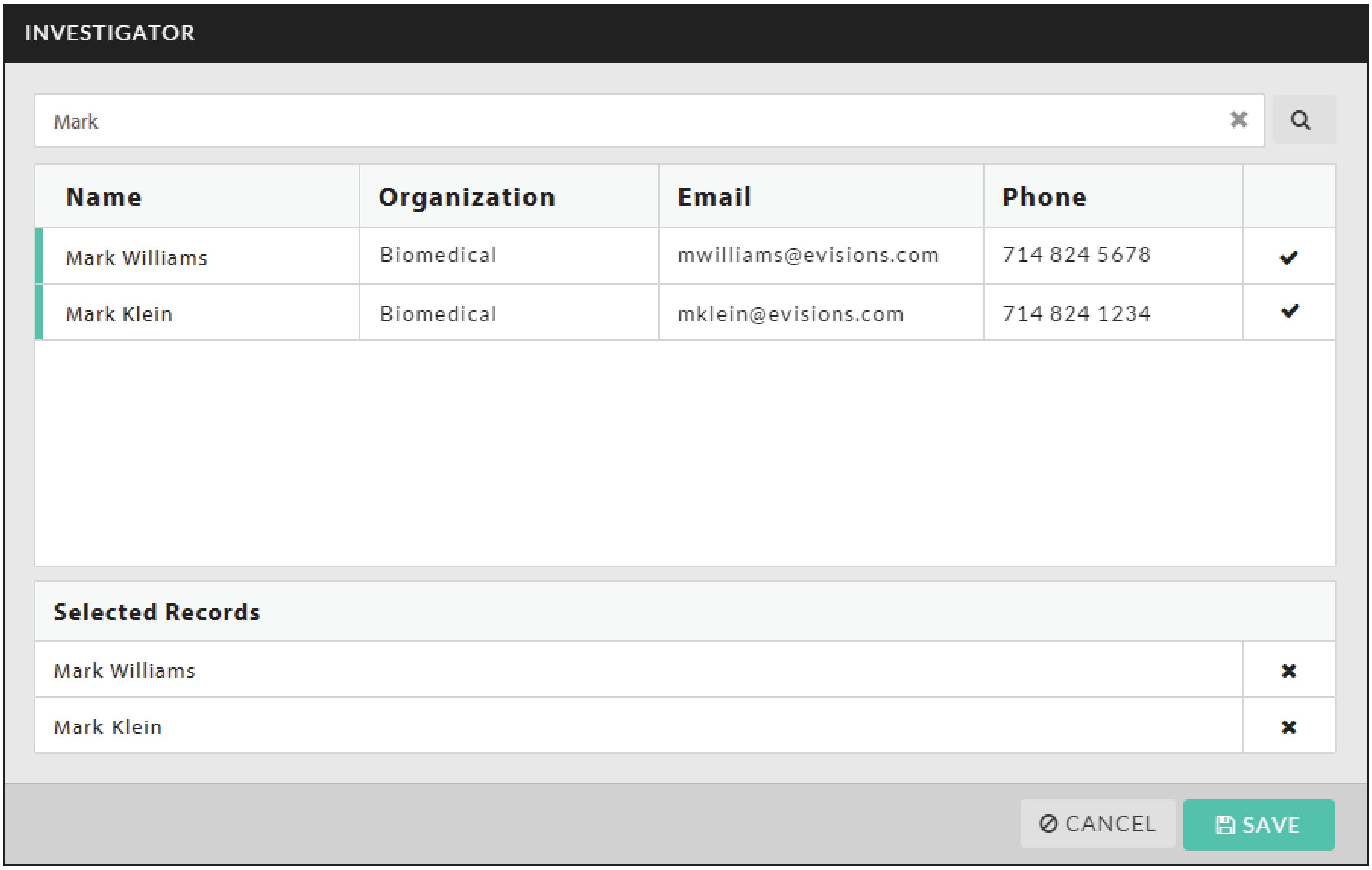


Click **Find People** to bring up the **Primary Contact** search dialog:



Type the name or part of the name of the person you are looking for in the search box and click the **Search** icon. Locate the desired person in the list, then click the **+** button next to their name to add them to the selection. Click **Save** to return to the form.

Other People fields allow you to select more than one person. For example, when you click Find People, the **Investigator** search dialog allows you to select any number of investigators using the + buttons. When you add a person to the selection, the + button changes to a check mark.

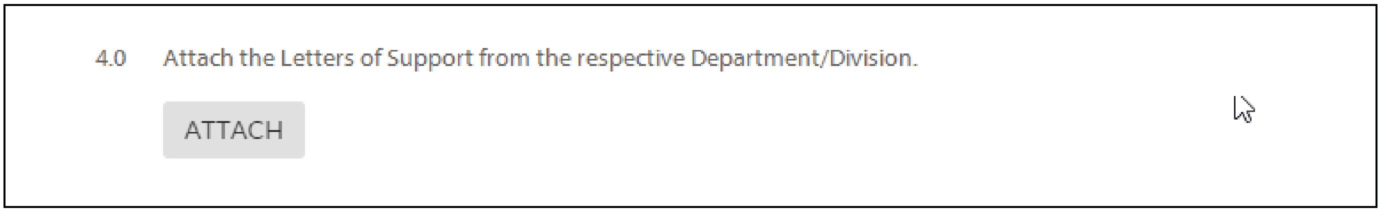


When you have added all the people you wish to include, click Save.

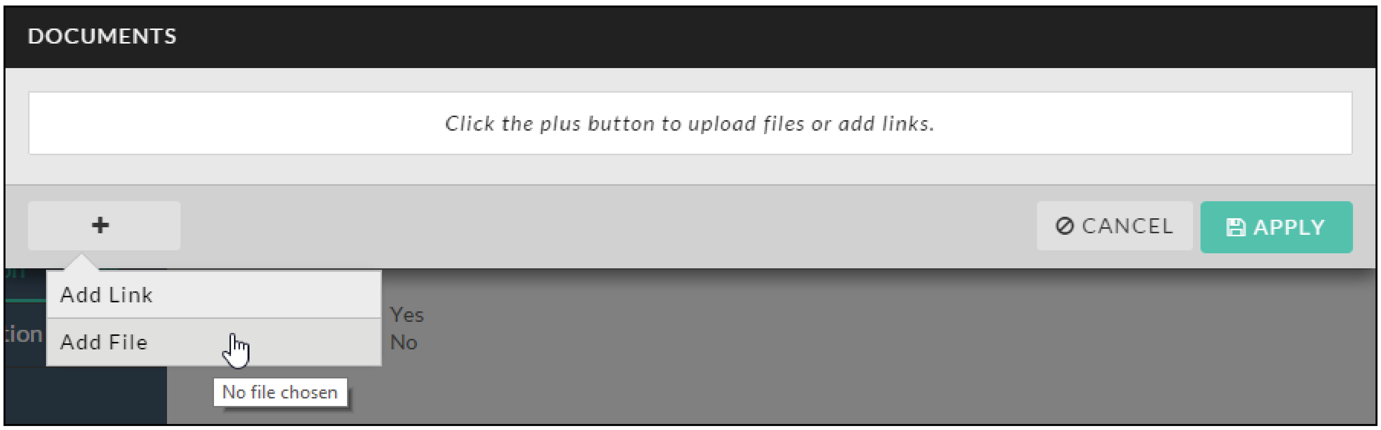
Sponsor finders work exactly the same way as Person finders, except that the search returns matching sponsors instead of people.

Attachments

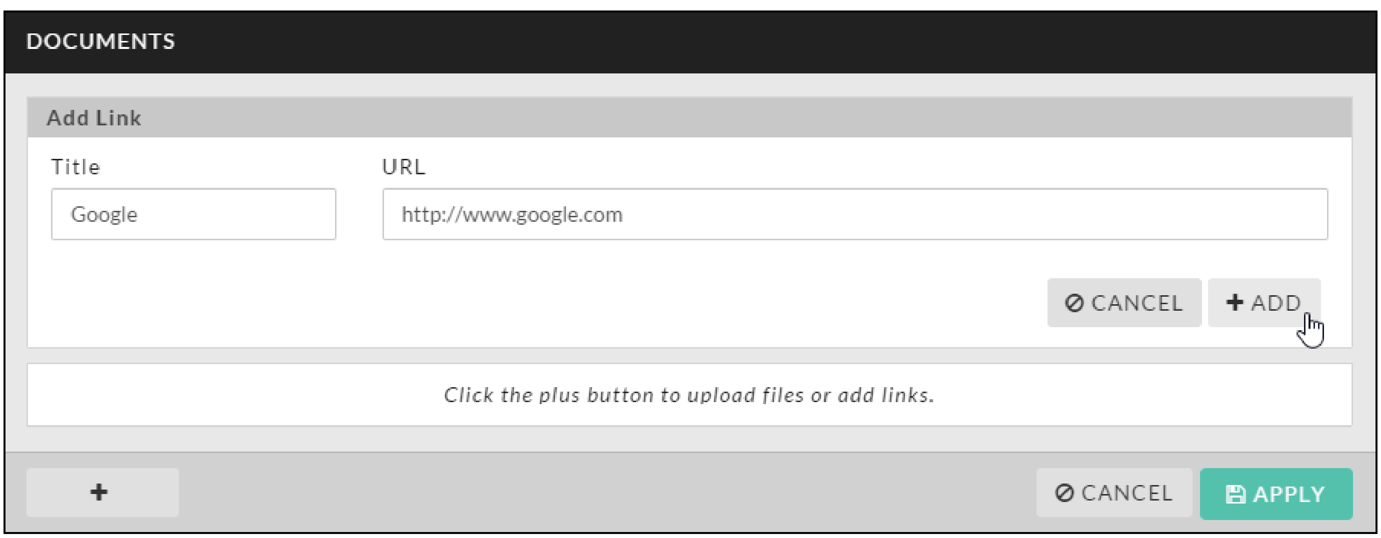
Attachment fields allow you to upload one or more files to the study, or to include hyperlinks as "attachments".



Click **Attach** to open the **Documents** window. To add a file or link, click the **+** button and choose to add a URL or file.



Choosing **Add File** launches the default file browser on your system. Choosing **Add Link** opens a text area where you can enter the URL and a title for the page:



Enter the desired URL or select the desired file, then click **Apply**.

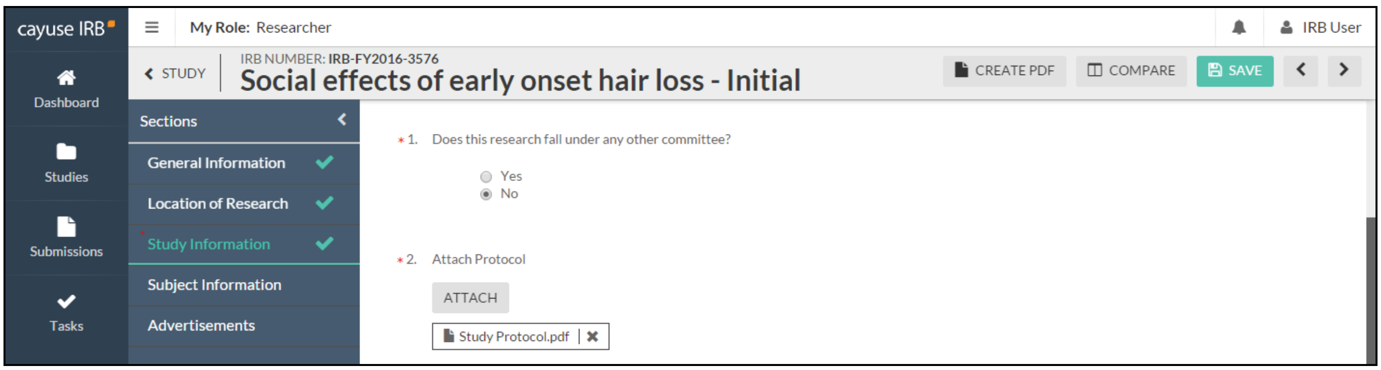
Supported File Types

Cayuse IRB supports the following file types. Each file can be a maximum of 20 MB in size.

File Type	Extension
Text	txt
Adobe	pdf
Raster image formats	png, bmp, gif, tif, tiff, jpg, jpeg, jp2, jpx
Vector image formats	wmf, emf, svg
Microsoft Word	doc, docx, docm
Microsoft Excel	xls, xlsx, xlsm
Microsoft PowerPoint	ppt, pps, pptx, pptm, ppsx, ppsm, sldx, sldm

Deleting Attachments

To delete an attachment, click the **X** icon next to the attachment. You can also download file attachments by clicking on the filename.



Required Questions

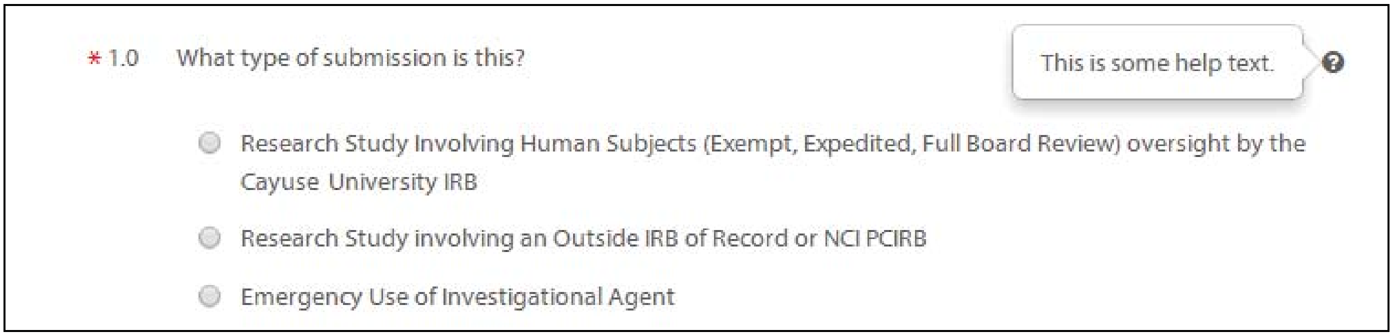
Some questions have a red asterisk (*) next to the question number. This indicates a required question that must be answered before you can submit.

Saving Your Changes

Sections that have unsaved changes have an asterisk next to the section name in the menu. To save your changes, click the Save button in the upper right.

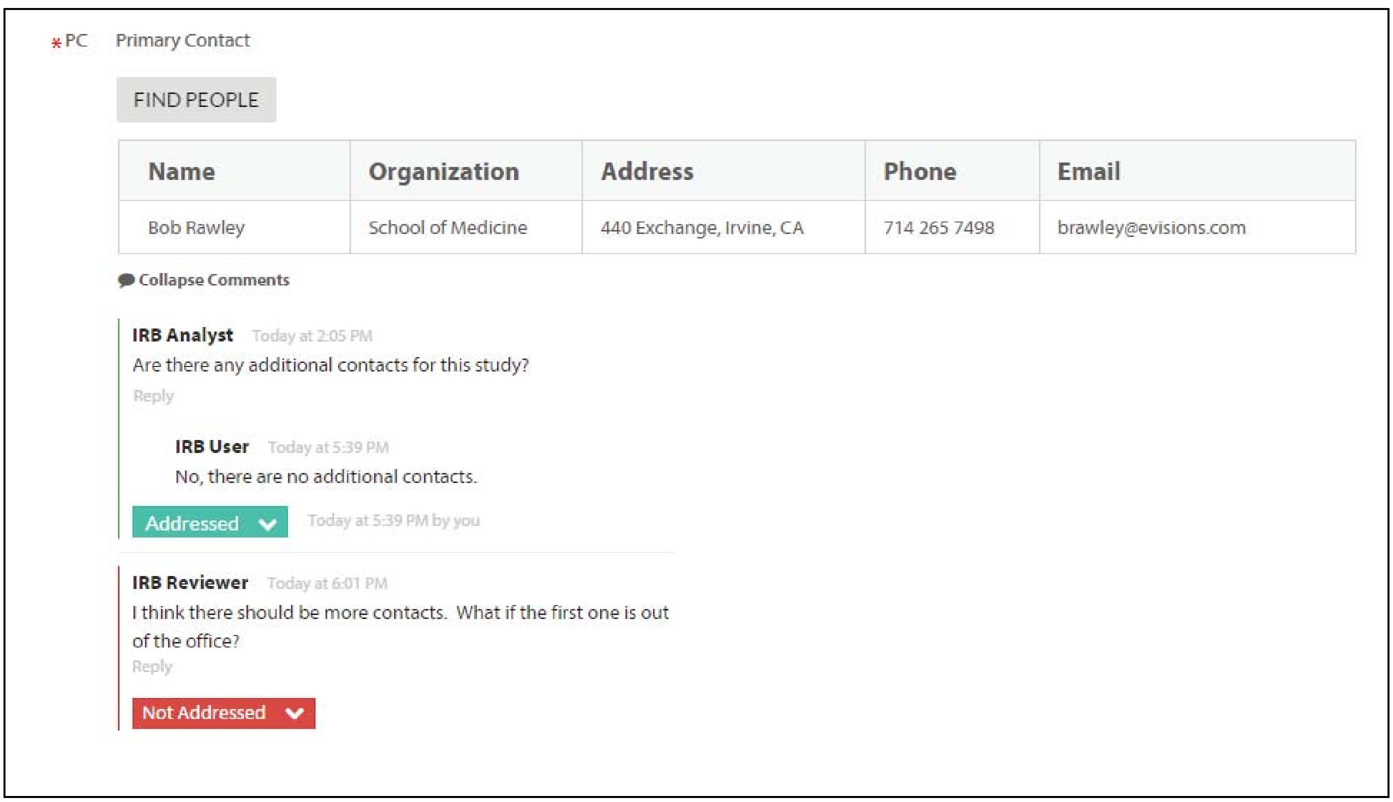
Help with questions

A question may provide additional information in case you need assistance with that particular question. If there is help text for a question, you can click on the **(?)** button to the right of the question to view the additional information for that question.



Comments

When the IRB Office is reviewing a submission, the IRB Analyst or Members may have questions regarding some of your answers. If the submission gets returned to you, you will see a comment icon in the sidebar next to each section that contains comments, and a similar icon underneath the questions that have comments on them. Click the 1 **Expand Comments** link to see and respond to these comments.



When you have responded to a comment, change the dropdown from Not Addressed to Addressed. Unaddressed comments have a red bar to their left, and display the comment count in the comment bubble icon for that question. You can toggle comments between addressed and unaddressed as needed.

Routing

If there are available actions that you can perform, the **Routing** menu appears prompting you to perform the action. For example, when you finish filling out all parts of the submission, a "Complete Submission" link appears in the Routing menu. Completing the submission will send it to the PI for certification, which is the next step in the submission workflow.