

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 screenshot shows the 'General Information' section of a form. The left-hand menu has 'General Information' highlighted in green. The main content area is titled 'General Information' and contains the following sections:

- 1. Principal Investigator: A table with columns for Name, Organization, Address, Phone, and Email. The table contains one row with the following data:

Name	Organization	Address	Phone	Email	
IRB User	School of Medicine	440 Exchange, Irvine, CA	714 265 7841	irbuser@evisions.com	✕
- 2. Primary Contact: A section with the text 'Please select the Primary Contact for this Protocol.' and a 'FIND PEOPLE' button.
- 3. Anticipated Start Date: A date picker field.

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.

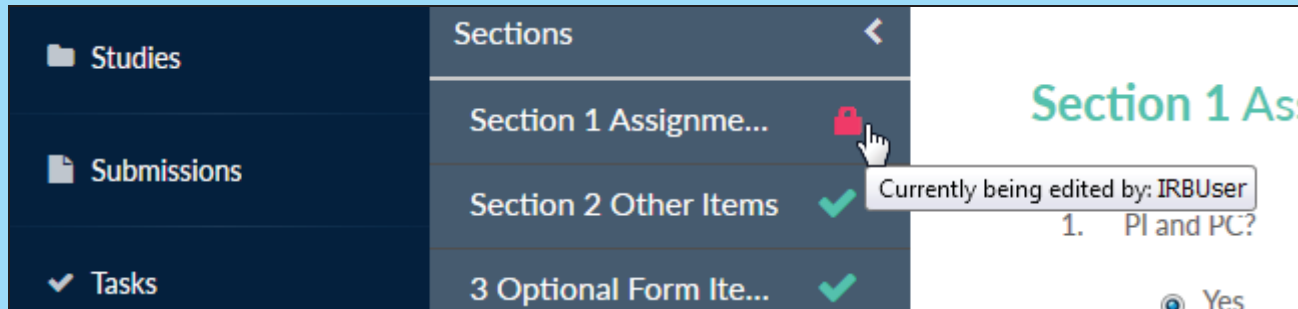
The screenshot shows the 'Location of Research' section of a form. The left-hand menu has 'Location of Research' highlighted in green. The main content area is titled 'Location of Research' and contains the following sections:

- 1. Will your research be conducted on campus?
 - Yes
 - No
- a. Select the type of facility where the research will be conducted.
 - Correctional Facility
 - Home Health Agency
 - Veterans Hospital
 - Health Clinic
 - Other

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.

* 1.0 What type of submission is this? 

- Research Study Involving Human Subjects (Exempt, Expedited, Full Board Review) oversight by the Cayuse University IRB
- Research Study involving an Outside IRB of Record or NCI PCIRB
- Emergency Use of Investigational Agent
- Request for Determination of the Need for IRB Review

Check Boxes

Select one or more of the available options.

* 3.0 In which locations will the research take place? (Check all that apply.)

- Inpatient Location
- Outpatient Location
- Community Settings
- Subject's Home
- N/A (limited to review of records, data and analysis)

Date Picker

Click the calendar icon to browse for a date.

7.2 Date the event started:



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.

* 3.0 Create a SHORT title for your research protocol. (Five words maximum.)

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.


* 2.0 What is the FULL title of the research protocol?

B **I** U ~~S~~

- ☰

- ☰

[G](#) 

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.

Add Image

Choose source:

Upload

Web URL

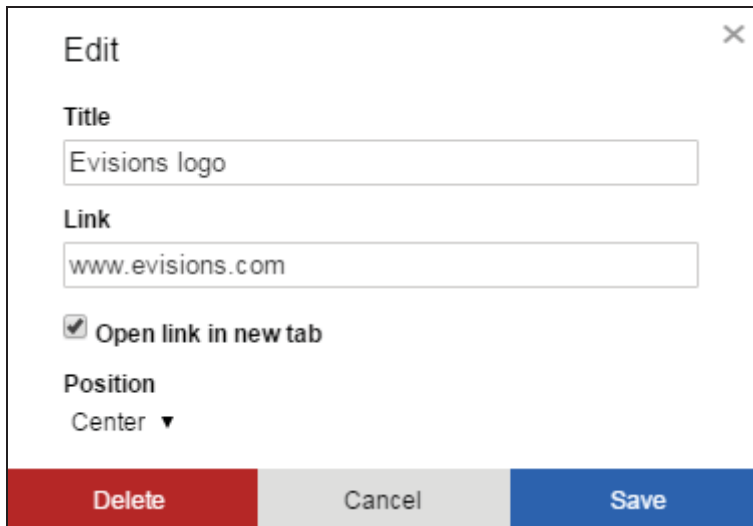
Clipboard

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, this 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.



Edit [Close]

Title
Evisions logo

Link
www.evisions.com

Open link in new tab

Position
Center ▾

Delete **Cancel** **Save**

Person and Sponsor Finders

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

* 1.0 Who is the Primary Contact?

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

PRIMARY CONTACT

✕ 🔍

Name	Organization	Email	Phone	
Mark Williams	Biomedical	mwilliams@evisions.com	714 824 5678	+
Mark Klein	Biomedical	mklein@evisions.com	714 824 1234	+

Selected Records * Select a single record.

No records selected. Select a record and click **Save** to apply.

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.

INVESTIGATOR

x
Q

Name	Organization	Email	Phone	
Mark Williams	Biomedical	mwilliams@evisions.com	714 824 5678	✓
Mark Klein	Biomedical	mklein@evisions.com	714 824 1234	✓

Selected Records

Mark Williams	x
Mark Klein	x

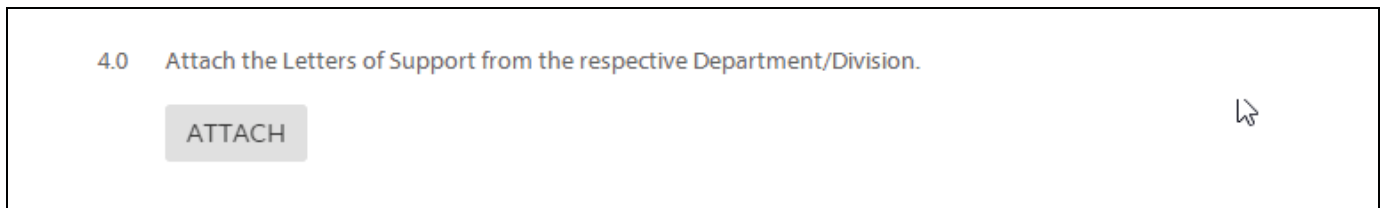
CANCEL
SAVE

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".

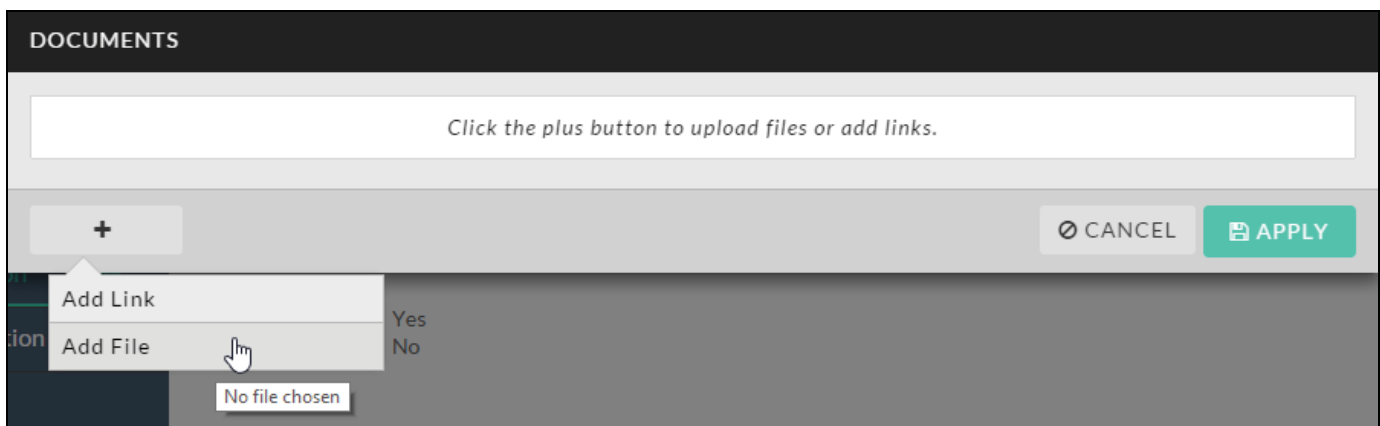


4.0 Attach the Letters of Support from the respective Department/Division.

ATTACH

A mouse cursor is positioned over the ATTACH button.

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



DOCUMENTS

Click the plus button to upload files or add links.

+ CANCEL APPLY

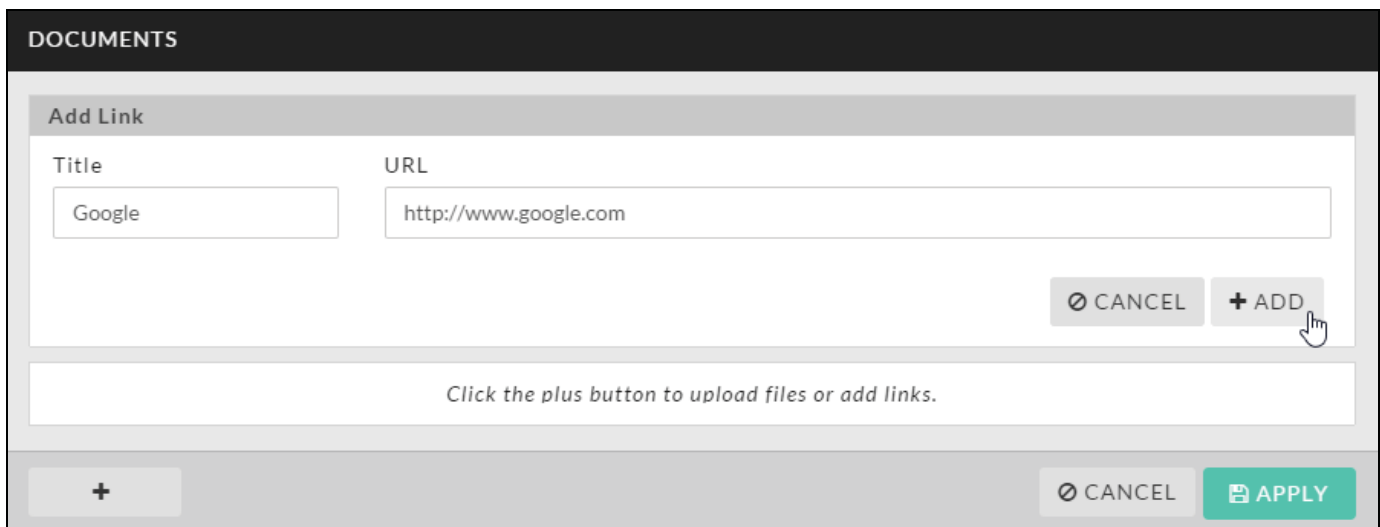
Add Link
Add File

Yes No

No file chosen

The DOCUMENTS window is open, showing a plus button menu with options for 'Add Link' and 'Add File'. A mouse cursor is hovering over 'Add File', and a 'No file chosen' message is displayed below it. The 'CANCEL' and 'APPLY' buttons are visible at the bottom right of the window.

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:



DOCUMENTS

Add Link

Title URL

Google http://www.google.com

CANCEL + ADD

Click the plus button to upload files or add links.

+ CANCEL APPLY

The DOCUMENTS window is open, showing the 'Add Link' form. The 'Title' field contains 'Google' and the 'URL' field contains 'http://www.google.com'. The '+ ADD' button is highlighted with a mouse cursor. The 'CANCEL' and 'APPLY' buttons are visible at the bottom right of the window.

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, xlsxm
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.

The screenshot shows the Cayuse IRB interface for a researcher. The top navigation bar includes 'My Role: Researcher', 'IRB NUMBER: IRB-FY2016-3576', and buttons for 'CREATE PDF', 'COMPARE', and 'SAVE'. The main content area displays a study form titled 'Social effects of early onset hair loss - Initial'. On the left, a sidebar lists sections: 'General Information' (checked), 'Location of Research' (checked), 'Study Information' (checked), 'Subject Information', and 'Advertisements'. The main form area shows two questions: '1. Does this research fall under any other committee?' with radio buttons for 'Yes' and 'No', and '2. Attach Protocol' with an 'ATTACH' button and a file attachment labeled 'Study Protocol.pdf' with a delete icon.

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.

* 1.0 What type of submission is this? This is some help text. ?

- Research Study Involving Human Subjects (Exempt, Expedited, Full Board Review) oversight by the Cayuse University IRB
- Research Study involving an Outside IRB of Record or NCI PCIRB
- Emergency Use of Investigational Agent


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  [Expand Comments](#) link to see and respond to these comments.

* PC Primary Contact

FIND PEOPLE

Name	Organization	Address	Phone	Email
Bob Rawley	School of Medicine	440 Exchange, Irvine, CA	714 265 7498	brawley@evisions.com

 Collapse Comments

IRB Analyst Today at 2:05 PM
Are there any additional contacts for this study?
Reply

IRB User Today at 5:39 PM
No, there are no additional contacts.
Addressed Today at 5:39 PM by you

IRB Reviewer Today at 6:01 PM
I think there should be more contacts. What if the first one is out of the office?
Reply
Not Addressed

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.

The screenshot displays the cayuse IRB interface for a researcher. The top navigation bar shows the user's role as 'Researcher' and the study title 'Social effects of early onset hair loss - Initial'. The left sidebar contains navigation options: Dashboard, Studies, Submissions, Tasks, and Help. The 'Routing' menu is expanded, showing 'Send to PI for certification?' and a 'COMPLETE SUBMISSION' button. The main content area is titled 'Advertisements' and contains a question: 'Will advertisements be used during your research protocol?' with radio button options for 'Yes' and 'No'. A link to the 'Advertisement Policy' is provided. The footer includes the Evisions Research Suite logo and contact information.