



ALL APPLICABLE MODULES

Find a Study

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Contents

Introduction	1
Navigation in iRIS™	1
Path Directory Tree.....	1
Back Button.....	2
Find a Study Page	2
Find a Study Filters.....	3
Find a Study Advanced Find Options.....	4
Key Study Personnel.....	6
Drugs associated to Study.....	8
Devices Associated to Study.....	8
Drugs associated to IACUC Study.....	8
Restraint Devices associated to IACUC Study.....	8
Species associated to IACUC Study.....	9
Issues Reported to the Board.....	9
Study Key Words.....	10
Find a Study Application Find Options.....	11
Viewing a Study Record.....	32
Common Rule Display Option.....	34

Introduction

The iRIS™ system includes a robust, flexible search tool for locating studies by study number, study alias, study key words, reference number, Principal Investigator (whether active or inactive), Key Study Personnel, drugs or devices associated to the study, and more. The tool also allows for creation of custom search filters.

Note that while the screenshots shown in this manual are from specific iRIS™ modules (e.g., IACUC, Animal Resource Center, etc.), the following features and functionality discussed are the same across all modules where the “Find a Study” link and page are employed.


System labels are configurable by the institution. The terms “study” and “protocol” are used interchangeably in this manual and the included screenshots.

Navigation in iRIS™

iRIS™ includes two standard navigation tools on all pages that are nested one or more levels beneath the primary module workspace page (e.g., Study Assistant, Conflict of Interest Assistant, Animal Resource Center, etc.): a Path directory tree and a **Back** button.

Path Directory Tree

The **Path** item at the upper left of the iRIS™ header provides a hyperlinked menu directory tree, allowing the user to quickly navigate back through the path they followed to get to their current location. **Path** appears on all pages nested at least one level beneath the main workspace

In the example shown below, the user is viewing the **Broadcast Notice**  **Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



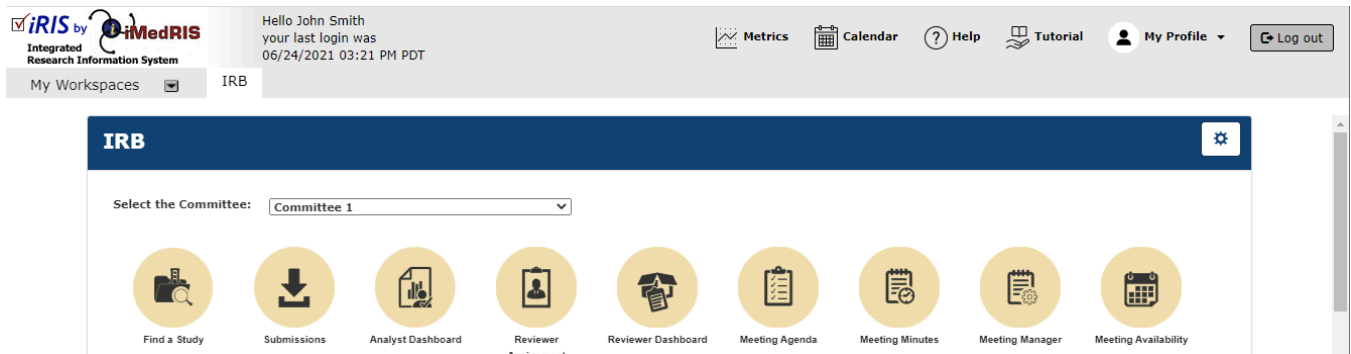
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



Click on **board admin** in the **Path** to navigate up one level in the directory tree, to the **Board Administration** page. There is now one level in the **Path**: **Home**.



Click on **Home** in the **Path** to navigate up one level in the directory tree to the main workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.



Back Button

The second navigation tool is the **Back** button, which appears on all pages nested at least one level beneath the main workspace. The **Back** button takes the user to the same location as the last link shown in the **Path**.



In the example shown above, both the **Back** button and the **broadcast notice** link in the **Path** return the user to the **Broadcast Notice** page.



Clicking the **Back** button on the **Broadcast Notice** page returns the user to the **Board Administration** page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

*Note that where the **Back** button appears on a page with editable fields or document upload controls, clicking the button before saving changes returns the user to the same location as the last link shown in the **Path** without saving changes.*

Find a Study Page

Click a valid **Find a Study** link (Home > [module] > Find a Study) to open the **Find a Study** page (shown below).

The screenshot shows the 'Find A Study' interface. At the top, there are navigation tabs: 'My Workspaces', 'Study Assistant', and 'Find A Study'. Below this is the 'Find a Study Filters' section, which includes various input fields for search criteria. To the right of the filters are three buttons: 'Advanced Find Options', 'Application Find Options', and 'Reset Find Options'. Below the filters, it indicates '0 result(s) found...'. At the bottom, there is a table header with columns: 'Open', 'Study Status', 'IRB Number', '2019 Common Rule?', 'IRB Expiration Date', 'Study Alias', and 'Principal Investigator'. The table body contains the text 'No Studies found that match the filter criteria'.

Enter or select desired search criteria in the **Find a Study Filters** section (described below) and click the **Find** button to execute the search. Click the **Reset Find Options** button to reset all filter fields.

Find a Study Filters

This is a detailed view of the 'Find a Study Filters' form. It contains several sections of input fields:

- Display Projects by:** A dropdown menu currently set to 'IRB Number'.
- Study Alias:** A text input field.
- Sponsor:** A text input field.
- Principal Investigator:** A text input field with a toggle button labeled 'Inactive' to its left.
- Department:** A text input field.
- IRB Expiration Date:** Two date input fields separated by a hyphen, each with a calendar icon.
- Common Rule:** A dropdown menu currently set to 'All'.
- IRB Number:** A text input field.
- Study Status:** A dropdown menu currently set to 'All'.
- Study Classification:** A dropdown menu currently set to 'All'.
- Reference Number:** A text input field.
- Include Studies that have not been assigned an IRB Number:** A checkbox that is currently unchecked.

The **Display Projects by** dropdown allows for study filtering by number type (e.g., study/protocol number, IRB number).

Text entry fields are provided to search by full or partial **Study Number/Alias**, **Sponsor**, **Department**, **IRB Number** or **Reference** number.

The **Principal Investigator** (PI) field can be used to search by full or partial PI name and includes a button to toggle the search between **Active** or **Inactive** PIs. As shown below, the button is toggled to **Active** by default.

This is a close-up view of the 'Find a Study Filters' form. A red rectangular box highlights the 'Active' button and the 'Principal Investigator' text input field. The 'Active' button is currently selected, and the 'Principal Investigator' field is empty. Other filter fields are visible in the background but not highlighted.

Click the **Active** button to toggle it to **Inactive**, as shown below.



Note that it is not possible to search by both **Active** and **Inactive** PIs simultaneously.

The **Location Status** dropdown enables filtering by **Location Status**. Note that *Location Status* is configured by the institution under *System Administration > Setup Locations Status*.

The **Study Status** dropdown provides a pick list to filter the search by study status. Click an item in the list to select it.

The **Study Classification** dropdown provides a pick list to filter the search by study classification. Click an item in the list to select it.

Calendar widgets are provided for searching by **IRB Expiration Date** range. Available date range options are as follows:

- to limit the search to studies whose **IRB Expiration Date** occurs on or *after* a specific date, click the left-hand calendar widget and select the desired start date; leave the right-hand date field blank
- to limit the search to studies whose **IRB Expiration Date** occurs on or *before* a specific date, click the right-hand calendar widget and select the desired end date; leave the left-hand date field blank
- to limit the search to studies whose **IRB Expiration Date** occurs *between* two specific dates, select the desired start date using the left-hand calendar widget and the end date using the right-hand calendar widget

Find a Study Advanced Find Options

Additional search options and filters are available via the **Advanced Find Options** button, as shown below.

A screenshot of the search filter interface. On the left, there are several search filters: 'IRB Number:' with a text input field, 'Protocol Status:' with a dropdown menu set to 'All', 'Protocol Classification:' with a dropdown menu set to 'All', 'Reference Number:' with a text input field, and a checkbox labeled 'Columns that have not been assigned an IRB Number:'. On the right, there is a vertical stack of buttons: 'Advanced Find Options' (with a plus icon and highlighted by a red box), 'Application Find Options' (with a document icon), 'Reset Find Options' (with a refresh icon), and 'Find ...' (with a magnifying glass icon).

Click the button to open the **Find A Study: Advanced Search Options** popup, shown below.

Find A Study: Advanced Search Options

Key Study Personnel ⓘ

Active Select User Name:

Select User Role(s):

- Principal Investigator
- Additional Principal Investigator
- Co-Investigator
- Faculty Advisor
- Nurse
- Study KSP1
- Study Author

Drugs associated to Study ⓘ

Trade Name:

Generic Name:

Investigational Name:

Devices associated to Study ⓘ

Device Name:

Drugs associated to IACUC Study ⓘ

Trade Name:

Generic Name:

Investigational Name:

Restraint Devices associated to IACUC Study ⓘ

Device Name:

Species associated to IACUC Study ⓘ

Species Name: --none--

Issues Reported to the Board ⓘ

Issue Type: --none--

Cancel Apply

Note that the number of panels that appear in this popup window is dependent on which module “Find a Study” is being access from. In this particular example, the IACUC assistant “Find a Study” is used, and the popup includes panels for 8 different advanced search criteria:

- Key Study Personnel
- Drugs associated to Study
- Devices associated to Study
- Drugs associated to IACUC Study
- Restraint Devices associated to IACUC Study
- Species associated to IACUC Study
- Issues Reported to the Board

— Study Key Words

Enter desired search criteria in one or more of the panels (see following subsections) and click the **Apply** button to apply the filter criteria to the main **Find A Study** search page. As shown below, when advanced search criteria are selected, the **Advanced Find Options** button on the **Find A Study** page updates with a yellow background and green checkmark to indicate that these options are in use.



Click the **Cancel** button on the **Find A Study: Advanced Search Options** popup to close it without applying any of its search criteria to the main **Find A Study** page.

To clear individual **Advanced Find Options**, click the **Advanced Find Options** button to reopen the **Find A Study: Advanced Search Options** popup. Clear any search criteria previously entered there and click the **Apply** button at the bottom of the popup.

Click the **Reset Find Options** button on the **Find A Study** page to clear all selected filters and/or search criteria.

For the remainder of this subsection, individual panels of the **Find A Study: Advanced Search Options** popup are discussed in isolation.

Key Study Personnel

The **Key Study Personnel** panel provides three (3) search options:

- Search for studies by the full or partial **User Name** of assigned **Active** study personnel
- Search for studies by the full or partial **User Name** of assigned **Inactive** study personnel
- Search for studies by **User Role** of assigned study personnel

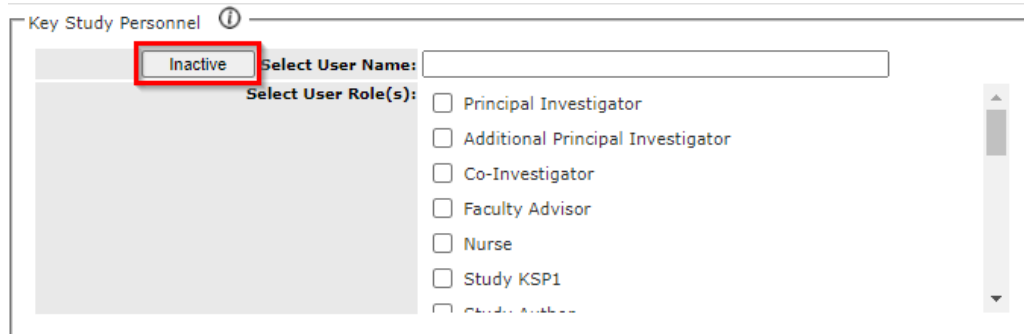
As shown below, when the **Find a Study: Advanced Search Options** is initially opened, the **Active** button is enabled for the **Select User Name** field.

A screenshot of a web application interface titled "Key Study Personnel". It features a "Select User Name:" text input field. To the left of this field is a button labeled "Active", which is highlighted with a red rectangular box. Below the text input field is a section titled "Select User Role(s):" followed by a list of roles with checkboxes: "Principal Investigator", "Additional Principal Investigator", "Co-Investigator", "Faculty Advisor", "Nurse", "Study KSP1", and "Study Author".

To search **Active** study personnel by **User Name**, enter the full or partial name in the **Select User Name** field.

To search **Inactive** study personnel by **User Name**, click the **Active** button to toggle it to **Inactive**, then enter the full or partial name in the **Select User Name** field.

*Note that it is not possible to search by both **Active** and **Inactive** study personnel at the same time.*



The screenshot shows a search interface titled "Key Study Personnel". At the top left, there is a toggle button labeled "Inactive" which is highlighted with a red rectangular box. To its right is a text input field labeled "Select User Name:". Below these is a section titled "Select User Role(s):" containing a list of roles, each with an unchecked checkbox: "Principal Investigator", "Additional Principal Investigator", "Co-Investigator", "Faculty Advisor", "Nurse", "Study KSP1", and "Study Author". A vertical scrollbar is visible on the right side of the role list.

To search by **User Role(s)**, select the desired checkbox(es) in the **Select User Role(s)** section. Note that the roles available here will depend on your specific system configurations. Some common roles that may appear are:

- Principal Investigator
- Additional Principal Investigator
- Co-Investigator
- Faculty Advisor
- Nurse
- Study KSP1
- Study Author
- Contact
- Department Administrator
- Administrative Assistant
- Site Contact
- Additional Project Manager
- Project Staff
- Project Manager

The **Active/Inactive Select User Name** and **Select User Role(s)** fields can be used separately or concurrently.

Drugs associated to Study

This panel is used to search for studies based on **Drugs associated to Study** by **Trade Name**, **Generic Name** and/or **Investigational Name**.

Drugs associated to Study ⓘ

Trade Name:	<input type="text"/>
Generic Name:	<input type="text"/>
Investigational Name:	<input type="text"/>

Enter the full or partial drug name in the desired field(s).

Note that a separate panel, Drugs associated to IACUC Study, is provided further down in the popup window for searching by IACUC-specific study drugs.

Devices Associated to Study

This panel is used to search for studies by **Devices associated to Study**.

Devices associated to Study ⓘ

Device Name:	<input type="text"/>
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Enter the full or partial **Device Name** to use this search option.

Note that a separate panel, Restraint Devices associated to IACUC Study, is provided further down in the popup window for searching by IACUC-specific study restraint devices.

Drugs associated to IACUC Study

This panel is used to search for IACUC studies based on **Drugs associated to IACUC Study** by **Trade Name**, **Generic Name**, and/or **Investigational Name**.

Drugs associated to IACUC Study ⓘ

Trade Name:	<input type="text"/>
Generic Name:	<input type="text"/>
Investigational Name:	<input type="text"/>

Enter the full or partial drug name in the desired field(s).

Note that a separate panel, Drugs associated to Study, is provided higher up in the popup for searching by non-IACUC study drugs.

Restraint Devices associated to IACUC Study

This panel is used to search for IACUC studies by **Restraint Devices associated to IACUC Study**.

Restraint Devices associated to IACUC Study ⓘ

Device Name:

Enter the full or partial **Device Name** to use this search option.

Note that a separate panel, Devices associated to Study, is provided higher up in the popup for searching by non-IACUC study devices.

Species associated to IACUC Study

This panel is used to search for IACUC studies by **Species associated to IACUC Study**.

Species associated to IACUC Study ⓘ

Species Name: --none-- ▾

Click in the field to open the **Species Name** dropdown list.

Species associated to IACUC Study ⓘ

Species Name: --none-- ▾

Issues Reported to the Board ⓘ

- none--
- Axis deer
- Mouse

Click to select the desired **Species Name** from the dropdown list.



Note that only one item can be selected in the dropdown list.

Issues Reported to the Board

This panel is used to search for studies by **Issues Reported to the Board**.

Issues Reported to the Board ⓘ

Issue Type: --none-- ▾

Issue Reported Range:  - 

The panel provides four (4) search options:

- Issue Type
- Issue reported on or *after* a specified date
- Issue reported on or *before* a specified date
- Issue reported *between* two specified dates

Click in the **Issue Type** dropdown list and click an item in the list to select it.

Calendar widgets are provided for searching by issue reporting date.

Available date range options are as follows:

- to limit the search to studies whose issue reporting date occurs on or *after* a specific date, click the left-hand calendar widget and select the desired start date; leave the right-hand date field blank
- to limit the search to studies whose issue reporting date occurs on or *before* a specific date, click the right-hand calendar widget and select the desired end date; leave the left-hand date field blank
- to limit the search to studies whose issue reporting date occurs *between* two specific dates, select the desired start date using the left-hand calendar widget and the end date using the right-hand calendar widget

Note that the **Issue Type** and **Issue Reporting Range** fields can be used individually or in combination to search by reported issues.

Study Key Words

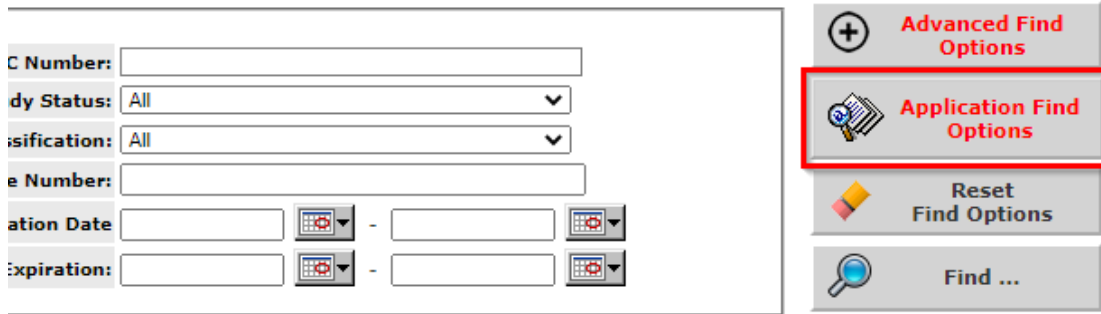
Use the **Study Key Words** field to search for studies by keyword.

Enter desired **Key Words** to use this search option.

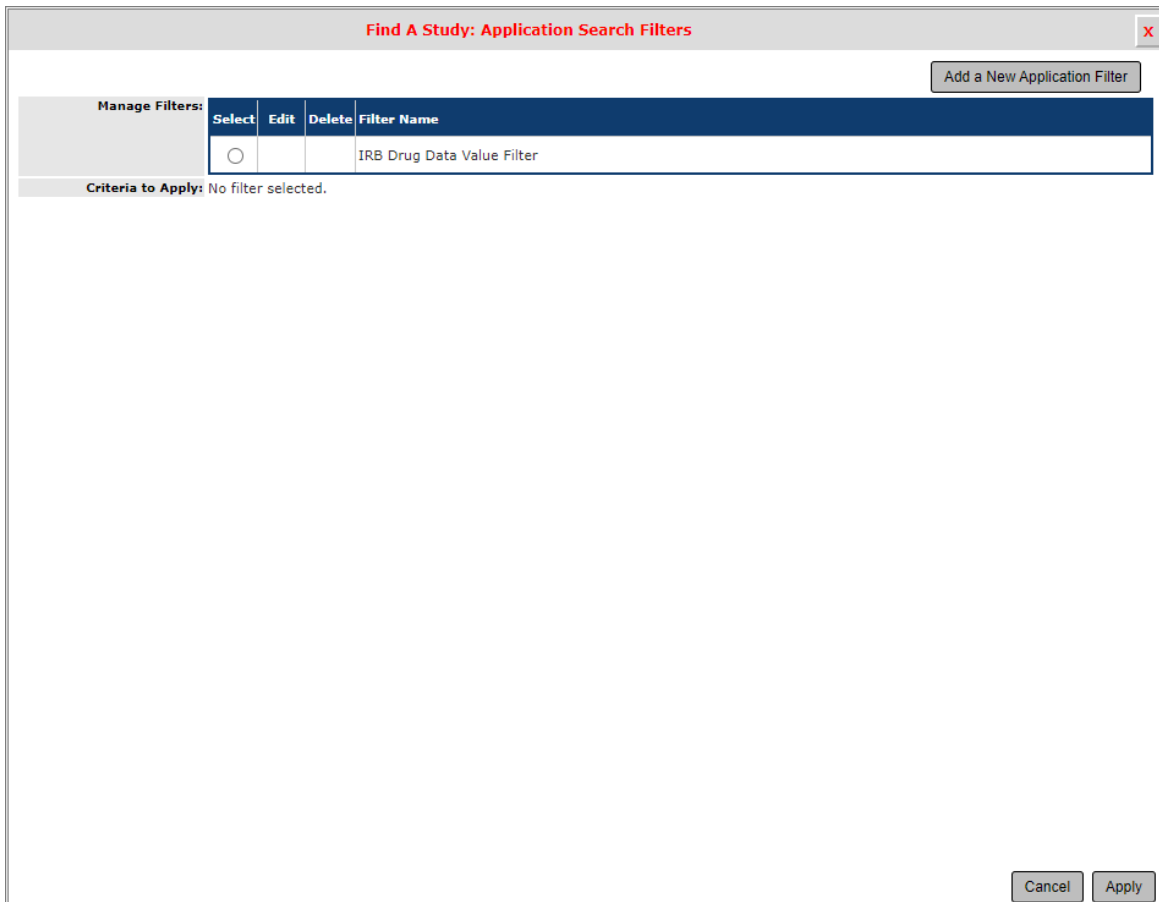
Find a Study Application Find Options

Click the **Application Find Options** button to create and save application (module) -specific filters for re-use as needed.

*Note that **Application Find Options** filters can be used in conjunction with any other search criteria and filters on the **Find a Study** page, including **Advanced Find Options**.*



The **Find A Study: Application Search Filters** page opens.



Manage Filters:	Select	Edit	Delete	Filter Name
	<input type="radio"/>			IRB Drug Data Value Filter

Criteria to Apply: No filter selected.

Click the **Cancel** button to close the page without making changes or applying filters to the current search.

Click the **Add a New Application Filter** button to open an add panel. *In the following example a search filter is created for IACUC applications, but the same general process applies to creating IRB application filters.*

X
Find A Study: Add Application Search Filter

***Filter Name:**

***Share this Filter:** Yes No

Comments:

Order	What Application?	What Section? <small>What Question?</small>	What Column?	Comparator	Value
No validation clauses defined for this branch.					

Enter the desired **Filter Name**.

Select “Yes” or “No” for **Share this Filter**. A selection of “Yes” makes the filter available to other users, a selection of “No” keeps the filter private to the person who created it.

Enter any desired **Comments** (e.g., a description of the filter’s purpose).

Click the **Add a new Filter Criteria** button to construct the filter.

Find A Study: Add Application Search Filter X

***Filter Name:**

***Share this Filter:** Yes No

Comments:

Add a new Filter Criteria

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
No validation clauses defined for this branch.					

As shown below, a new record populates in the filter criteria table.

Find A Study: Add Application Search Filter
X

*Filter Name:

*Share this Filter: Yes No

Comments:

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
(X) 1	--none--	--none-- --none--	--none--	--none--	

The fields in this criterion record are used to filter search results based on the answer(s) to specific question(s) in a study/project application form.

In this example, the filter will limit search results to those studies where the justification for using animal subjects is based on complexity of the study model *and* all study animals are expected to survive. Two different study application criteria must be added to the filter:

- a rationale of “The complexity of the processes being studied cannot be duplicated or modeled in a simpler system,” must be selected in response to the Animal Justification field of the application

— the answer to the question, “Is death (without euthanasia) a planned endpoint of the study?” must be “No”, as shown below

The **Order** field dictates the priority level of the criteria item in the overall filter. When the filter consists of a single criterion, the **Order** for that criterion is “1”. When multiple criteria are added to the filter, their **Order** values can vary.

Order	What Application?	What Section?	What Column?	Comparator	Value
1	--none--	--none--	--none--	--none--	

Click on the **What Application?** field and select the applicable application/module from the dropdown list. In this example the “IACUC APPLICATION (ANIMALS)” option is selected, as shown below. Note that all comboboxes in this window are searchable via the text box displayed directly above the dropdown list.

Find A Study: Add Application Search Filter X

*Filter Name:

*Share this Filter: Yes No

Comments:

Order	What Application?	What Section?	What Column?	Comparator	Value
(X) 1	--none-- <input type="text" value=""/>	--none-- <input type="text" value=""/>	--none-- <input type="text" value=""/>	--none-- <input type="text" value=""/>	<input type="text" value=""/>

--none--

- Apliacion de IACUC
- IACUC APPLICATION (ANIMALS)
- IACUC Data Values
- IBC APPLICATION (BIO-SAFETY)
- INSTITUTIONAL REVIEW BOARD APPLICATION

The **What Section?** and **What Question?** dropdown lists are automatically populated with items applicable to the application/module selected in the **What Application?** field.

Click in the **What Section?** field and select the study application section in which the first question applicable to the filter is found. In this example, the “(400) - Project Description and Procedures” section is selected, as shown below.

Find A Study: Add Application Search Filter X

*Filter Name:

*Share this Filter: Yes No

Comments:

[Add a new Filter Criteria](#)

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS) ▾	<div style="border: 1px solid gray; padding: 2px;"> --none-- <input style="width: 100%; height: 20px;" type="text"/> </div> <div style="border: 1px solid gray; padding: 2px; margin-top: 2px;"> --none-- (100) - NOTE: The IACUC recommends investigators contact (200) - Project Identification (300) - Personnel Identification and Qualifications (350) - Use of Privately Owned Animals (400) - Project Description and Procedures </div>	--none-- ▾	--none-- ▾	--none-- ▾

Return to List Save

Click in the **What Question?** field and select the question applicable to the filter. In this example, the “(22) – Animal justification” question is selected, as shown below.

Find A Study: Add Application Search Filter

*Filter Name:

*Share this Filter: Yes No

Comments:

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS)	(400) - Project Description and Procedures --none--	--none--	--none--	

--none--

(10) - Lay Summary

(22) - Animal justification

(24) - Species justification

(26) - Animal number justification

(30) - Experimental Design

(40) - Procedures

(50) - Blood/Tissue/Other Samples

Recall that in the IACUC study application, four possible answers to this question and an explanation field are provided, as shown below.

Section view of Application	Entire view of the Application
<ul style="list-style-type: none"> 1.0 General Information 2.0 Setup Department(s) Access 3.0 Grant Key Personnel access to the study 4.0 Form Information 5.0 Project Identification 6.0 Personnel Identification and Qualifications <li style="background-color: #004a99; color: white;">7.0 Project Description and Procedures 	<div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 10px;"> <p>7.2 Animal justification</p> <p>Justify the use of live vertebrate animals rather than alternative means. Provide a rationale for the use of animals in your research or class. Check all that apply:</p> <p><input checked="" type="checkbox"/> The complexity of the processes being studied cannot be duplicated or modeled in a simpler system. (1)</p> <p><input type="checkbox"/> There is not enough information known about the processes being studied to design nonliving models. (2)</p> <p><input type="checkbox"/> Teaching protocol to prepare students, to develop skills, or understand processes (3)</p> <p><input type="checkbox"/> Other (4)</p> <p>Provide further explanation of your selection(s) made above:</p> <p>Extant literature on this topic is sparse</p> </div>

Two components, or columns, are stored as the answer to this question.

The first column contains one or more entries of the number 1 to 4), indicating which checkbox is selected. Multiple entries can be stored in the response because the user can select more than one checkbox. In the database this column is named "IACUC_ANI_JUST".

The second column contains any text entered in the “Provide further explanation of your selection(s) made above:” text box. In the database this column is named “IACUC_ANI_JUST_EXP”.

Note: Because column titles are not always named in descriptive, plain English, strong knowledge of the fields and tables involved in constructing the filter is required to avoid errors.

Click on the **What Column?** field and select the column that contains the data value applicable to the filter. In this example “IACUC_ANI_JUST” is selected.

Find A Study: Add Application Search Filter X

*Filter Name:

*Share this Filter: Yes No

Comments:

Order	What Application?	What Section?	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	--none-- ▾ <div style="border: 1px solid red; padding: 2px; margin-top: 5px;">IACUC_ANI_JUST</div> IACUC_ANI_JUST_EXP	--none-- ▾	<input style="width: 100%;" type="text"/>

As shown below, because the answer to this question offers four possible options in response, a “Which Option?” field appears to enable further specification.

Find A Study: Add Application Search Filter X

*Filter Name:

*Share this Filter: Yes No

Comments:

[Add a new Filter Criteria](#)

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ Which Option? --none-- ▾	--none-- ▾	Yes <input type="radio"/> No <input type="radio"/>

Return to List Save

As explained above, the dropdown list contains four options. In this particular example, the first option (“The complexity of the processes being studied cannot be duplicated or modeled in a simpler system.”) is selected, as shown below.

Find A Study: Add Application Search Filter X

*Filter Name:

*Share this Filter: Yes No

Comments:

Add a new Filter Criteria

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ Which Option? 1 ▾ --none-- 1 2 3 4	--none-- ▾	Yes <input type="radio"/> No <input type="radio"/>

Click in the **Comparator** field and select the desired item from the dropdown list. Comparators are used as follows:

- EQUAL is used for comparisons against either text or numeric field values and is equivalent to the “=” mathematical operator; the **Value** entered for comparison must *exactly* match the value entered in the application form, including all letters, spaces and characters when used for text field comparisons
- NOT EQUAL is used for comparisons against either text or numeric field values and is equivalent to the “≠” mathematical operator; the **Value** entered for comparison must *not* match the value being compared in the application form, including all letters, spaces and characters when used for text field comparisons (e.g., NOT EQUAL to “Syrian hamsters” is not the same comparison as NOT EQUAL to “hamster”; the former comparison would exclude all records containing the specified species “Syrian hamsters”, the latter would exclude all records with the word “hamster” anywhere in the species field)
- LESS THAN is used for numeric field value comparisons only and is equivalent to the “<” mathematical operator
- LESS THAN EQUAL is used for numeric field value comparisons only and is equivalent to the “≤” mathematical operator

- GREATER THAN is used for numeric field value comparisons only and is equivalent to the “>” mathematical operator
- GREATER THAN EQUAL is used for numeric field value comparisons only and is equivalent to the “≥” mathematical operator

Find A Study: Add Application Search Filter X

***Filter Name:**

***Share this Filter:** Yes No

Comments:

Add a new Filter Criteria

Order	What Application?	What Section? <small>What Question?</small>	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ <small>Which Option?</small> 1 ▾	<div style="border: 1px solid gray; padding: 2px;"> --none-- ▲ <input style="width: 100%; height: 20px;" type="text"/> --none-- EQUAL NOT EQUAL LESS THAN LESS THAN EQUAL GREATER THAN GREATER THAN EQUAL </div>	<input type="radio"/> Yes <input type="radio"/> No

Select the **Value** against which the **Comparator** will be used.

Find A Study: Add Application Search Filter

*Filter Name:

*Share this Filter: Yes No

Comments:

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ Which Option? 1 ▾	EQUAL ▾	<input checked="" type="radio"/> Yes <input type="radio"/> No

In the case of Yes/No select checkboxes or radio buttons, three possible options may be shown in the **Value** column:

- “Yes”, which is the value stored in the database when the checkbox/radio button for the item is selected
- “No”, which is the value stored in the database when the checkbox/radio button for the item is *not* selected
- “Not Set”, which is the value stored in the database when no checkbox(es)/radio button(s) for the item is(are) selected, indicating that the question was not answered; this option is only available for fields where a response is not required in the study application, or for draft applications where the question has not yet been answered

The example shown below demonstrates behavior of the **Value** field when the filter comparison is against a text entry.

Find A Study: Add Application Search Filter X

*Filter Name:

*Share this Filter: Yes No

Comments:

Order	What Application?	What Section? What Question?	What Column?	Comparator	Value
(X) 1	IACUC APPLICATION (ANIMALS) ▾	(300) - Personnel Identification and Qualifications ▾ (10) - Project Participants Prior to approval of the AU ▾	PL_EM_PHONE ▾	--none-- ▾	(555) 555-5555

In this type of comparison, the **Value** column contains a text entry field.

Returning to the original filter example, a second filter criterion is required to fulfill the filter parameters. Click the **Add a new Filter Criteria** button to add another filter criterion.

Find A Study: Add Application Search Filter X

*Filter Name:

*Share this Filter: Yes No

Comments:

Add a new Filter Criteria

Order	What Application?	What Section?	What Column?	Comparator	Value
		What Question?			
<input checked="" type="radio"/>	1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ Which Option? 1 ▾	EQUAL ▾ <input checked="" type="radio"/> Yes <input type="radio"/> No

A second criterion record appears below the first.

Find A Study: Add Application Search Filter
X

*Filter Name:

*Share this Filter: Yes No

Comments:

	Order	What Application?	What Section?	What Column?	Comparator	Value
			What Question?			
⊗	1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ Which Option? 1 ▾	EQUAL ▾	<input checked="" type="radio"/> Yes <input type="radio"/> No
⊗	2	--none-- ▾	--none-- ▾ --none-- ▾	--none-- ▾	--none-- ▾	<input type="text"/>

Follow the same steps as for the first criterion row to populate the new row. In this example, the second comparison is against the answer to the question, “Is death (without euthanasia) a planned endpoint?”

Find A Study: Add Application Search Filter
X

*Filter Name:

*Share this Filter: Yes No

Comments:

	Order	What Application?	What Section?	What Column?	Comparator	Value
			What Question?			
⊗	1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ Which Option? 1 ▾	EQUAL ▾	<input checked="" type="radio"/> Yes <input type="radio"/> No
⊗	2	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (150) - Is death (without euthanasia) a planned endpoint ▾	_500_100_DEATH_NO_EUTHANASIA_YN ▾	EQUAL ▾	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Set

The filter in this example is now complete. If additional criteria rows are needed, click the **Add a new Filter Criteria** button and follow the steps outlined above to add and populate them.

If any criteria are added in error, click the delete icon in the far-left column to remove the unwanted criteria. A confirmation popup window displays.

Find A Study: Add Application Search Filter

***Filter Name:**

***Share this Filter:** Yes No

Comments:

Add a new Filter Criteria

	Order	What Application?	What Section?	What Column?	Comparator	Value
<input checked="" type="checkbox"/>	1	IACUC APPLICATION (ANIMALS)	(400) - Project Description and Procedures (22) - Animal justification	IACUC_ANI_JUST Which Option? 1	EQUAL	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="checkbox"/>	2	IACUC APPLICATION (ANIMALS)	(400) - Project Description and Procedures (150) - Is death (without euthanasia) a planned endpoint	_500_100_DEATH_NO_EUTHANASIA_YN	EQUAL	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Set

Return to List Save

Approved for Ordering

Confirm the Deletion.

Are you sure you want to delete?

Click **CANCEL** to close the popup without deleting the criterion.

Click **CONFIRM** to delete the record and close the popup.

Back on the **Find A Study: Add Application Search Filter** popup, click the **Return to List** button to close the popup without saving the filter.

Click the **Save** button to save the filter and close the popup.

Find A Study: Add Application Search Filter
X

*Filter Name:

*Share this Filter: Yes No

Comments:

	Order	What Application?	What Section?	What Column?	Comparator	Value
⊗	1	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (22) - Animal justification ▾	IACUC_ANI_JUST ▾ Which Option? 1 ▾	EQUAL ▾	<input checked="" type="radio"/> Yes <input type="radio"/> No
⊗	2	IACUC APPLICATION (ANIMALS) ▾	(400) - Project Description and Procedures ▾ (150) - Is death (without euthanasia) a planned endpoint ▾	_500_100_DEATH_NO_EUTHANASIA_YN ▾	EQUAL ▾	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Set

If **Save** was clicked, the filter is added to the **Find A Study: Application Search Filters** page.

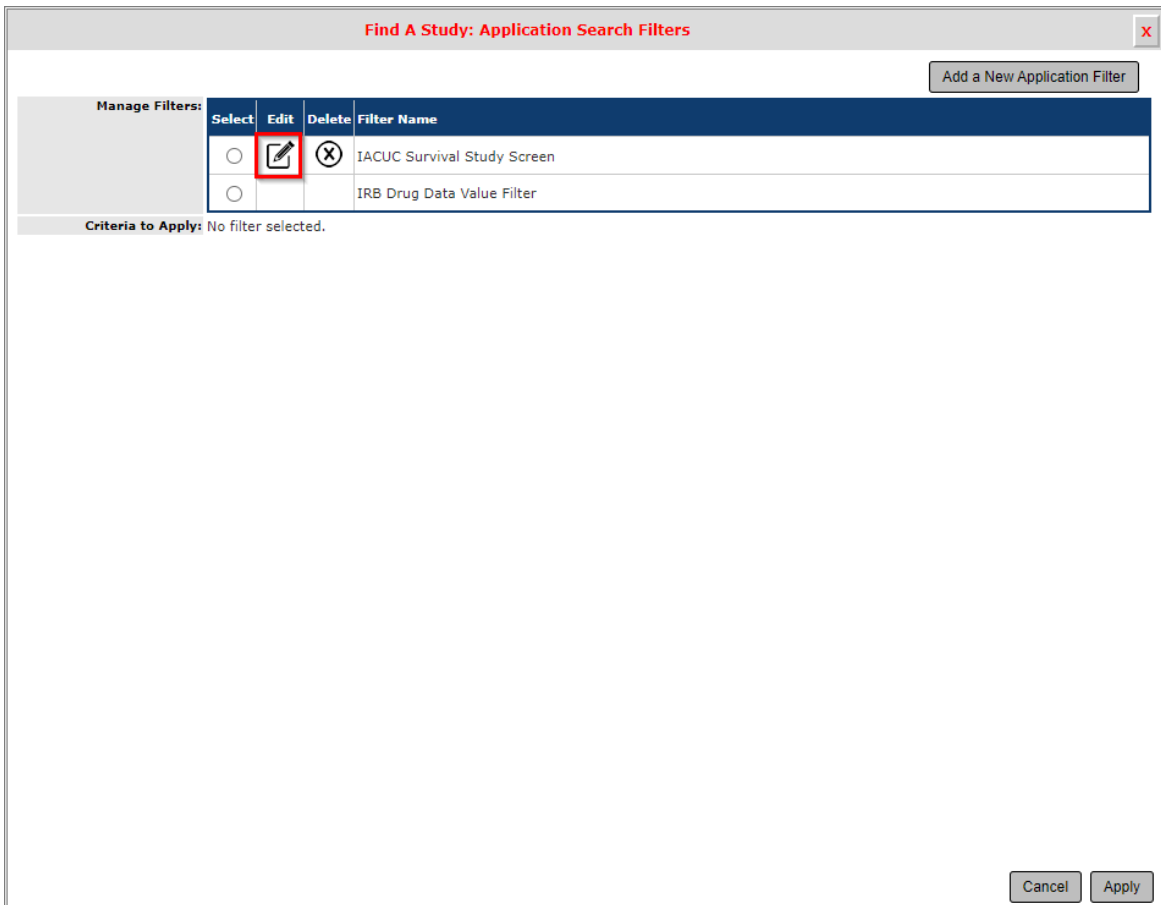
Find A Study: Application Search Filters
X

Manage Filters:

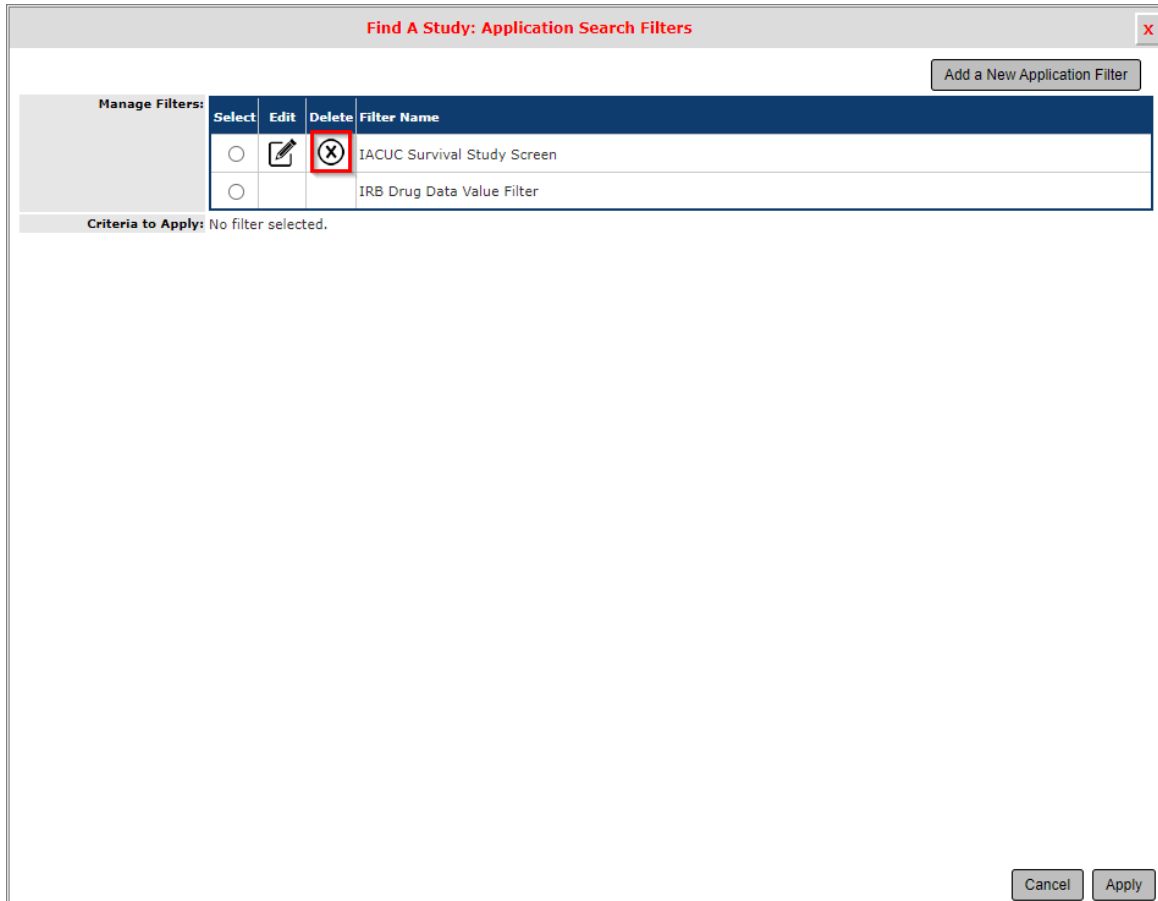
Select	Edit	Delete	Filter Name
<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	IACUC Survival Study Screen
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	IRB Drug Data Value Filter

Criteria to Apply: No filter selected.

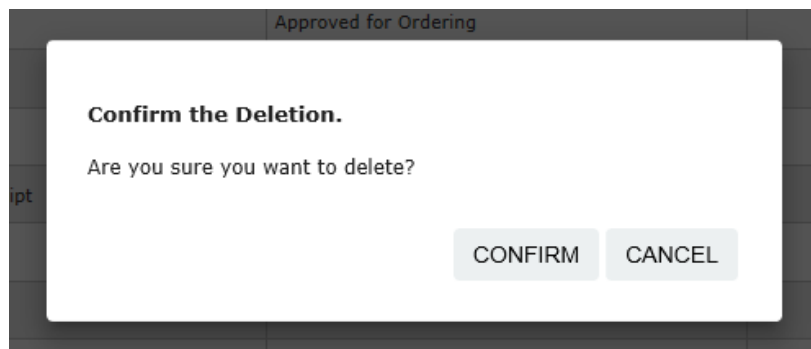
Click the icon in the **Edit** column (shown below) for any filter on the page to reopen the add panel for that filter and make revisions.



Click the icon in the **Delete** column (shown below) for any filter on the page to delete the associated filter.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the filter.

Click **CONFIRM** to delete the filter and close the popup.

Select the radio button in the **Select** column to display a preview of **Criteria to Apply** for the applicable filter, as shown below.

Add a New Application Filter

			Filter Name
<input checked="" type="radio"/>			IACUC Survival Study Screen
<input type="radio"/>			IRB Drug Data Value Filter

Application	What Section? What Question?	What Column?	Comparator	Value
IACUC APPLICATION (ANIMALS)	Section: (400) - Project Description and Procedures Question: (22) - Animal justification	IACUC_ANI_JUST - IACUC Animal Justification Which Option? 1 ▾	EQUAL	<input checked="" type="radio"/> Yes <input type="radio"/> No
IACUC APPLICATION (ANIMALS)	Section: (400) - Project Description and Procedures (150) - Is death (without euthanasia) a planned endpoint	_500_100_DEATH_NO_EUTHANASIA_YN	EQUAL	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Set

Cancel
Apply

Note that temporary changes can be made to active fields in the **Criteria to Apply** preview before applying the filter, but these changes will not be saved to the filter. To make and save changes to the filter, click the icon in the **Edit** column.

Click the **Cancel** button to close the **Find A Study: Application Search Filters** page *without* applying the selected filter.

Click the **Apply** button to close the page *and* apply the selected filter. As shown below, the **Application Find Options** button on the **Find A Study** page updates with a yellow background and checkmark to indicate saved application filters are in use.

Application Find Options remain active on the Find a Study page until the filter selection is cleared.

When more than one Application Find Options filter is in use, to clear an active filter click the Application Find Options button to reopen the Find A Study: Application Search Filters page. Clear the Select column radio button for any filter(s) to be removed from the search and click the Apply button at the bottom of the page.

Click the Reset Find Options button on the Find a Study page to clear all selected filters and/or search criteria.

Application Find Options filters can be used in conjunction with any other search criteria and filters on the Find a Study page, including Advanced Find Options.

Viewing a Study Record

To view a study in the Find a Study results, click the study's icon in the Open column.

Open	Study Status	IRB Number	2019 Common Rule?	IRB Expiration Date	Study Alias	Principal Investigator
	Active	IRB-21-476	Yes	06/24/2022	Malania in Juveniles Malania in Juveniles	Investigator, John

The selected study is opened and the user taken into the study record. By default, this page opens to the Submissions tab, as shown in the screenshot below.

Study Status: Active IRB Number : IRB-21-476 Study Title : Malaria in Juveniles
 IRB Expiration Date: 06/24/2022

Submissions Study Management Subject Management

Current Approval Packet

Protocol Items

- Study Application
- Informed Consents ▶
- Other Study Documents ▶
- Contract Documents

Protocol Items

- Reportable Event Form

- Initial Review Submission Form

Regulatory Forms

Regulatory Submission Forms

- Continuing Review Submission Form
- Study Amendment Form
- Study Closure Form
- Unanticipated Events Form
- Yearly Check-in Form

- Submissions History
- Study Correspondence

Track Location	Ref Number	Request Type	Process Submission
Waiting for Finalization of Routing List	001316	Click on the hyperlink to edit/view the submission. <input type="radio"/> Study Amendment Form	<input type="button" value="Retract Submission"/>

The **Submissions** tab displays any forms available for viewing by the review board. If the study is being access from the study-side of the system, this page will display all forms available to the research team for submitting to a review board. The study’s Informed Consents, Other Study Documents, Submission History and Study Correspondence are also accessible from this tab.

The **Submissions History Link** provides access to track the workflow of the initial submission and any other submission forms processed by the review board (shown in screenshot below). Clicking on a link under **Request Type** opens submission processing screens for that submission.

Study Status: Active IRB Number : IRB-21-476 Study Title : Malaria in Juveniles
 IRB Expiration Date: 06/24/2022

Submissions in Process Completed Submissions Submissions Returned with Changes Print Friendly

Reference Number	Track Location	Status	Request Type	Details	Review Board	View Outcome Letters	Review Process	Meeting Date	Review Outcome	Date Received
001316			Study Amendment Form							
			<input type="radio"/> Study Amendment Form ⓘ							

Click the **Study Correspondence** link to access a list of all notifications, signature requests, and notices that pertain to the study (shown in screenshot below).

Study Status: Active

IRB Number : IRB-21-476

Study Title : Malaria in Juveniles

IRB Expiration Date: 06/24/2022

Print Friendly Add A New Correspondence Delete Selected Correspondence

11 result(s) found... 1 - 10 ▶

☑	View Message	Author	Subject
<input type="checkbox"/>		Post a Reply to this Topic / Forward this Topic	
<input type="checkbox"/>		John Smith	Posted: 06/25/2021 02:07 PM PDT Malaria in Juveniles NOTICE OF PREREVIEW ADMINISTRATIVE ASSIGNMENT
<input type="checkbox"/>		Post a Reply to this Topic / Forward this Topic	
<input type="checkbox"/>		John Smith	Posted: 06/25/2021 12:12 PM PDT Malaria in Juveniles Outcome Letter Notification
<input type="checkbox"/>		Post a Reply to this Topic / Forward this Topic	
<input type="checkbox"/>		John Smith	Posted: 06/25/2021 12:12 PM PDT Malaria in Juveniles NOTICE OF PREREVIEW ADMINISTRATIVE ASSIGNMENT

Back on the **Submissions** page, click the **Study Management** tab (shown in screenshot below) to access additional study information and tracking tools.

Study Status: Active

IRB Number : IRB-21-476

Study Title : Malaria in Juveniles

IRB Expiration Date: 06/24/2022

Submissions

Study Management

Subject Management

Study Details

- Study Summary/Profile
- Screen Access
- Key Personnel
- External Personnel
- COI Status
- Review Board Selection
- Department Access
- Associated Projects

Finance Set-up

- Construct Study Plan
- Study Plan Timeline
- Study Accounts
- Budget Management
- Milestone Management

Finance Tracking

- Subject on Study Financial Tracking
- Invoice Management

Common Rule Display Option

When the `rb.use_common_rule_display` property (under `[review board module] > Review Board Administration > Board Configuration Options`) is set to “Yes”, a **Common Rule** filter is added to the search form on the **Find A Protocol** page and a **2019 Common Rule?** column is added to the result set (see red boxes in screenshot below).

The **Common Rule** filter field is comprised of a dropdown menu with the following options: “2019” Common Rule studies, “1991” Common Rule studies, or “All” studies. The default selection is “All”.

This value is based on the selection made in the **Select Categories For Study** dropdown on the Outcome tab (see screenshot below).

When the `rb.use_common_rule_display` property is set to “Yes”, an associated Merge Code (“Common Rule”) is made available for use in Meeting Minutes, Meeting Agendas and Outcome Letters. The Merge Code field populates with the applicable rule.

Also, when the property is set to “Yes”, the applicable rule displays in the Study/Submission header (shown below).

My Workspaces IRB Number: **IRB-21-456** IRB **Initial Review Submission Form** Back

Protocol Items Miscellaneous **Submission Forms**

Ref Number : **001275** IRB Number : **IRB-21-456** **Common Rule:** Common Rule - Effective January, 2019 Study Title : NIH - TD - 54345 - COVID-19 vaccine BNT162b1 elicits human antibody and TH1 T cell responses

Study Status: **Pending - Submitted for Initial Review**

Submission Details ▶
Submission Component(s) ▶
Pre-review Screening ▶
Submission Review ▶
Submission Outcome ▶

Submission Review Status

Submission Received	Analyst Assigned	Review Process Assigned	Reviewer(s) Assigned	All Reviewer(s) Complete	Submission Items Reviewed/Approved	Submission Outcome Assigned	Response Letter Generated	Submission Completed
<div style="width: 100%; height: 10px; background-color: #008080;"></div>	<div style="width: 100%; height: 10px; background-color: #008080;"></div>	<div style="width: 100%; height: 10px; background-color: #008080;"></div>	<div style="width: 100%; height: 10px; background-color: #008080;"></div>	<div style="width: 100%; height: 10px; background-color: #008080;"></div>	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>	<div style="width: 100%; height: 10px; background-color: #008080;"></div>	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>

Submission Correspondence

General Information

Study Alias: NIH - TD - 54345

Codes: **BIO** **DRG** **Cov19**

[Edit the Master Lay Summary](#)