



ALL APPLICABLE MODULES

Review Board Administration Notifications

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Introduction

This manual describes Review Board Administration (RBA) Notifications features and functionality in the iRIS™ system.

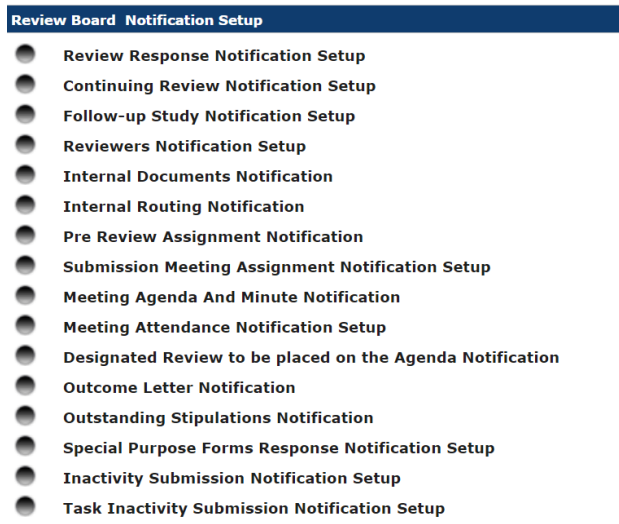
Note that while the screenshots shown in this manual are from specific iRIS™ modules (e.g., Post Award, IRB, etc.), RBA Notifications features and functionality are the same across all modules with the following two exceptions:

- Post Award Terms and Condition Notification
- Post Award Monitoring & Reporting Notification

These two notification types are only employed in the Post Award module.

Review Board Notification Setup

The **Review Board Notification Setup** panel, accessed via [Module] > Review Board Administration > [System Setup tab], provides links for configuration of various standardized notification types to be sent to applicable project personnel and board members.



Notifications configured here are automatically sent to applicable personnel when study tasks (e.g., review, signoff, set meeting availability, etc.) are assigned, completed, or overdue, or when certain submission milestones are reached.

NOTE: screenshots in this manual section are taken from various system modules (i.e., IRB, Post Award, etc.), but notification functionality and features described in this manual are the same in all modules where the notification is employed.

General Notification Setup Process

The general procedure for creating and editing notifications in iRIS™ is the same, regardless of type or module. A text editor panel is opened for creation and formatting of the notification boilerplate text, and system Merge Codes are optionally inserted to pull system data field values into the notification.

As shown in the example screenshot above:

The **Title** field is used as the subject line in the notification e-mail.

Some notifications include a **Send E-Mail Notification** Yes/No selection field. If “Yes” is selected the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Most notifications are automatically routed to responsible personnel based on their assigned role in the iRIS™ system, but some include an **Add** button for selection of specific iRIS™ users to receive the notification.

As shown in the screenshot above, some reminder notification types include a **Notification if Within** field, to specify how many days ahead of the task due date the notification is to be sent.

Internal Transfer Originating PI Signoff Reminder Notification

Title: PI Signoff Required

Notify every ? Days: 1 in days.

Send E-Mail Notification: Yes No

E-mail Content: PI signoff is required. Please check your Task List and complete any pending signoff tasks. [%rb_name%]

As shown in the screenshot above, some reminder notifications include a **Notify every ? Days** field to specify how frequently the reminder is to be re-sent until the assigned task or signoff is complete.

Internal Transfer Originating PI Signoff Exceeded Notification

Title: Signoff Deadline Exceeded

Notify when signoff has not been completed within ? Days: 2 in days.

Send E-Mail Notification: Yes No

E-mail Content: You have exceeded one or more signoff deadlines. Please check your Task List and complete any required signoff tasks. [%rb_name%]

As shown in the screenshot above, some signoff exceeded notifications include a **Notify when signoff has not been completed within ? Days** field. When a requested signoff is overdue, this field specifies a reminder notification is to be sent ? Days after the due date.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor.

E-mail Content: You have exceeded one or more signoff deadlines. Please check your Task List and complete any required signoff tasks. [%rb_name%]

See the *Using Merge Codes in Notifications* section of this manual, immediately following, for more information.

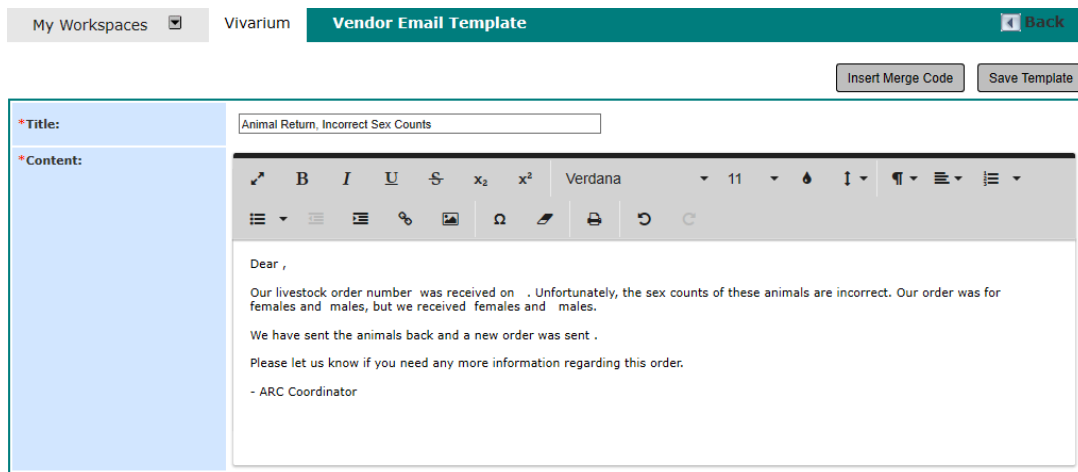
Using Merge Codes in Notifications

Merge Codes are used to pull data from iRIS™ records into documents, templates, forms and system webpages. Merge Codes are selected from a picklist, there is no need to write or edit any programmatic code to use Merge Codes.

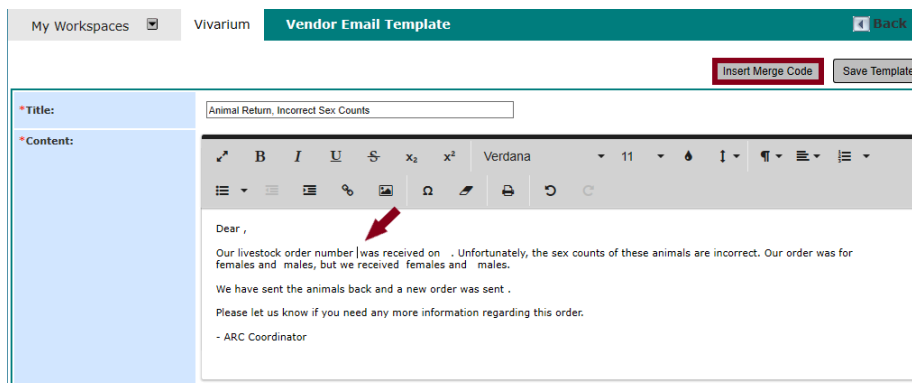
iRIS™ pages used for creation of email, document and form templates contain a text editor with standard text editing and formatting tools. Desired boilerplate text is entered, leaving spaces open for insertion of Merge Codes where applicable.

NOTE: screenshots in this section are primarily taken from the Animal Resource Center (ARC) module, but notification functionality and features shown are the same in Post Award Management.

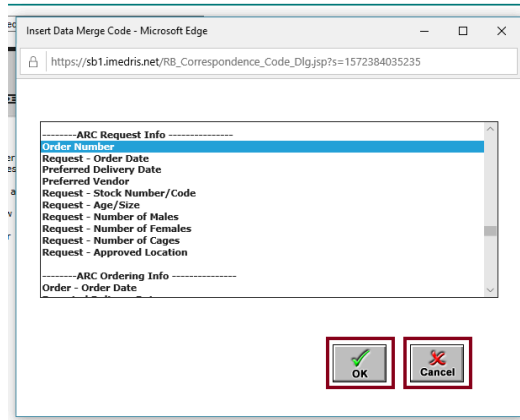
In the screenshot below a **Vendor Email Template** has been created to address the problem of incorrect sex counts in a livestock order. Empty spaces are left open where Merge Codes are to be inserted.



To insert a Merge Code, place the cursor in the text editor where the corresponding data value should appear, then click the **Insert Merge Code** button to open the Merge Codes picklist.

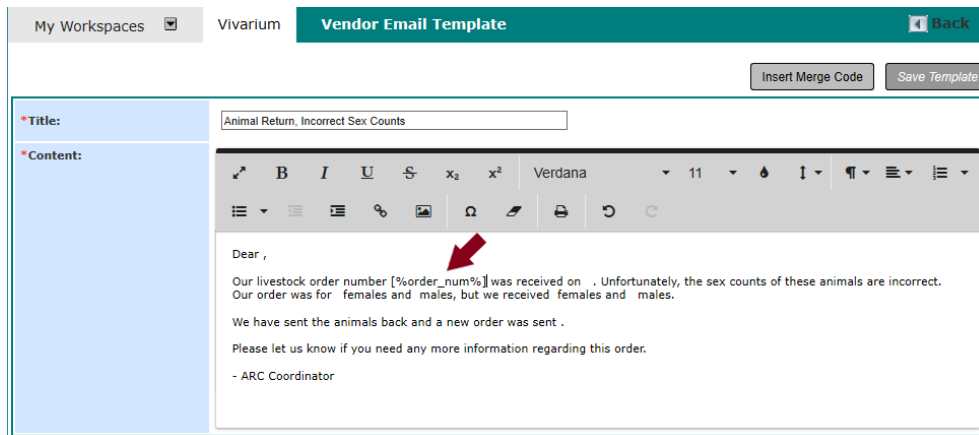


The **Insert Data Merge Code** popup window displays. Scroll down to the sections of the list labeled for Post Award Management and select the desired Merge Code. In this example, the Merge Code for “Order Number” is selected.

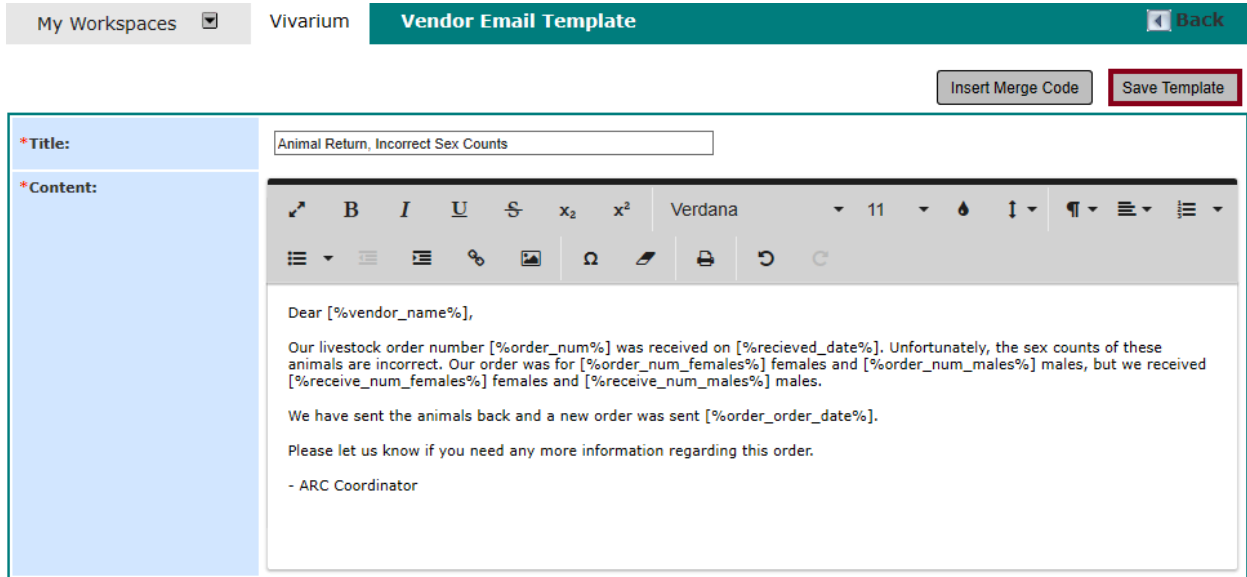


Click the **Cancel** button to close the popup without inserting the Merge Code.

Click the **OK** button to insert the Merge Code. The selected Merge Code is inserted in the template at the cursor location.



In the screenshot below, Merge Codes for “Vendor Name”, “Order Number”, “Date Received”, “Order - Number of Females”, “Order - Number of Males”, “Receive – Number of Females”, “Receive – Number of Males”, and “Order – Order Date” are inserted.

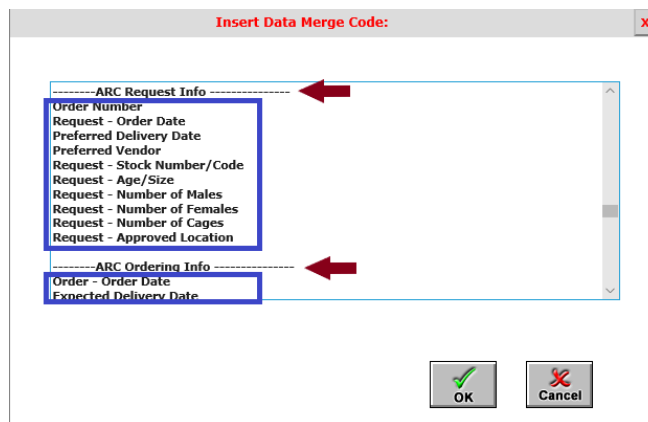


Merge Code List

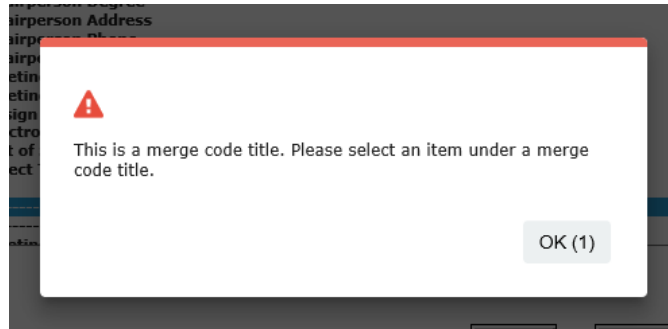
Depending on the user’s data access rights and the institution’s Review Board Administration settings, the Merge Code list can include system data from the following categories:

Review Board	Study Financial Information
Meetings	Submission Information
Multi-Site	Animal Resource Center Request Information
Project personnel	Animal Resource Center Ordering Information
Study Contacts	Animal Resource Center Receiving Information
Form Creator	Animal Resource Center Cage Information
Department Reviewer and Signoff	Study/IRB/IACUC Application Information

Most of the Merge Codes in the picklist are grouped under category titles. As shown in the screenshot below, category titles are offset by dashed lines. Selectable Merge Code items are indicated by blue boxes.

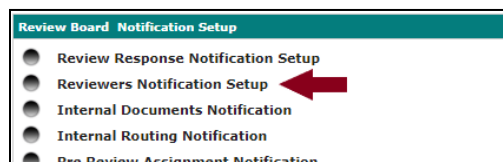


Category titles are not Merge Codes and cannot be inserted in the cage card template. If a title item is selected and the **OK** button is clicked, an error popup window displays.



Configure Reviewer Notification

Navigate to [Module] > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

My Workspaces Post Award Reviewers Complete Notification Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification


List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

- only one version of each reviewer complete/assignment/unassignment notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

In the screenshot below, no notifications are configured. Click the applicable **Add Notification** button.

List of RB Reviewers Complete Notifications					
Edit	Type	Title	Send E-mail Notification	Action	
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification	

List of Reviewer Assignment Notifications					
Edit	Type	Title	Send E-mail Notification	Action	
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification	

List of Reviewer Assignment Reminders					
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

A notification configuration panel opens. The same configuration panel is used for all six (6) of the reviewer notification types enclosed by the red box in the screenshot above.

Insert Merge Code Save Notification

Type of Notification:	Agenda Reviewer Assignment Notification
Title:	<input type="text" value="Agenda Reviewer Assignment"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> ↶ B <i>I</i> <u>U</u> S x₂ x² Verdana 11 🔥 ↑ 🔍 ☰ ☰ </div> <div style="border: 1px solid gray; padding: 5px;"> Be advised you have been assigned a reviewer task. Please see your workspace Task List for details of the assigned task. </div>

In this example an “Agenda Reviewer Assignment Notification” is being configured.

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification ←
↑	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all reviewer complete/assignment/unassignment notification types when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for all reviewer complete/assignment/unassignment notification types when configured.

Merge Codes Applicable to Meetings

Categories and Merge Codes from the list that are most applicable to meetings are summarized in the table below.

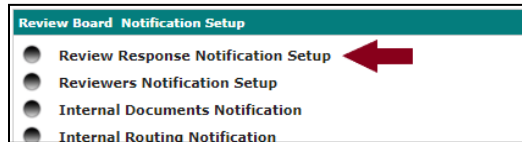
---Review Board Info ---	---Meeting Attendance Codes ---	---Submission Info ---
Review Board Name	Meeting Call to Order	Submission Approval Date
Review Board Committee Name	Meeting New Business	Submission Type
Chairperson Name (Last Name, First Name)	Meeting Old Business	Submission List of all reviewers
Chairperson Name (First Name, Last Name)	Meeting Miscellaneous	Submission Primary Reviewer
Chairperson First Name	Meeting Closing Comments	Submission Secondary Reviewer
Chairperson Middle Name	Meeting Actual Start Time	Submission all additional reviewers over secondary
Chairperson Last Name	Meeting Actual End Time	Submission AD Hoc Reviewers
Chairperson Degree	Meeting Planned Start Time	Item Number on Agenda
Chairperson Address	Meeting Planned End Time	All Project Departments
Chairperson Phone	Meeting Chair (Last, First)	All Project Institutions
Chairperson EMAIL	Meeting Chair (First, Last)	Project Title
Electronic Signature	Total Voting Members	Project Short Title
Meeting Date	Quorum	Project Status
Meeting Location	Voting Members Present	Study Title
	Non-Voting Members Present	Study Alias
	Alternate Members Present	Study Status
	Members Absent	Sponsor/Funding Source
	Member Ex-officio Present	Proposal Number
	Administrative Staff Present	Proposal Title
	Guests Present	Proposal Short Title
	Meeting Motions	Project Award Number
		Project Previous Award Number
		Project Open Ended
		Is Archived
		Archived Location

Review Response Notifications

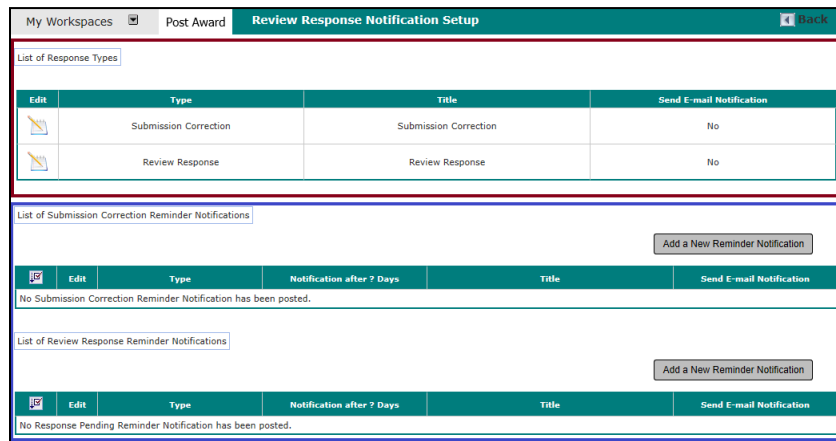
A review response notification is automatically sent to applicable project personnel when the review board returns a response or requests submission changes. Optionally, review response reminder notifications can also be configured to send when the board has not yet received a reply from the project personnel.

Both types of notification are configured on the **Review Response Notification Setup** page.

To access the page, navigate to [Module] > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review. Notice that placeholders for these notifications are pre-populated, and while these notification types can be edited, they cannot be deleted. Notice also that no Add buttons are provided for these notification types, only one version of each type can be configured.

- the “Submission Correction” notification type is sent when the board has completed a submission review and requests one or more specific corrections followed by re-submission
- the “Review Response” notification type is sent when the board has completed a submission review and sends a response *other* than a request for corrections (e.g., request for additional forms, request for Conflict of Interest (COI) documentation, etc.)

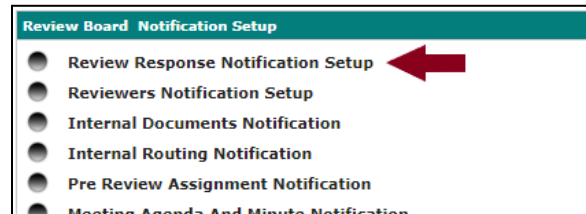
The blue box encloses reminder notifications for each of the two response notification types. Unlike response notifications, multiple versions of reminder notifications can be configured.

- Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study

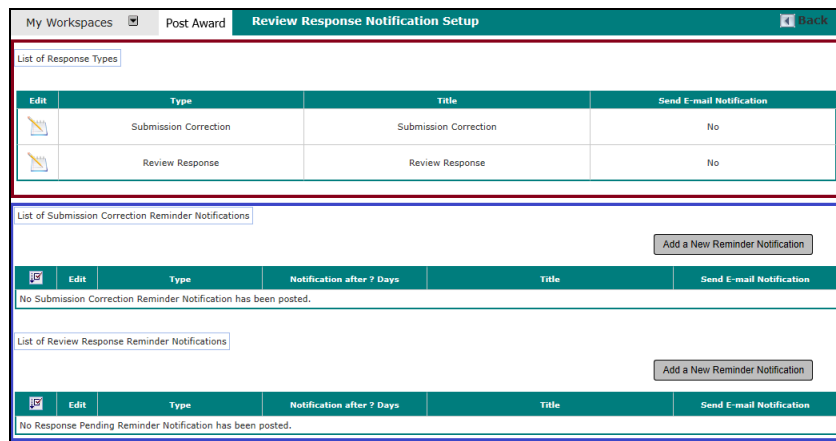
- Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Correction / Response Notification Setup

Navigate to [Module] > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



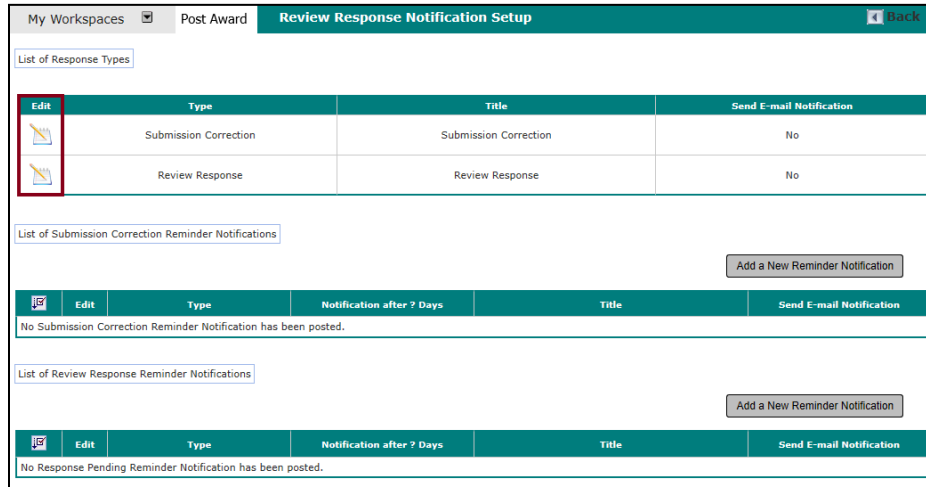
As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review. Notice that placeholders for these notifications are pre-populated, and while these notification types can be edited, they cannot be deleted. Notice also that no add buttons are provided for these notification types, only one version of each type can be configured.

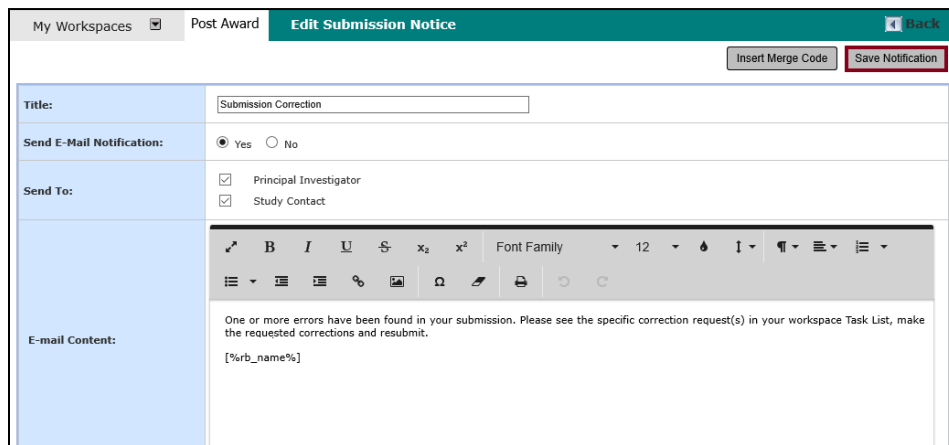
- the “Submission Correction” notification type is sent when the board has completed a submission review and requests one or more specific corrections followed by re-submission
- the “Review Response” notification type is sent when the board has completed a submission review and sends a response *other* than a request for corrections (e.g., request for additional forms, request for Conflict of Interest (COI) documentation, etc.)

The blue box encloses reminder notifications for each of the two response notification types.

Click the icon in the **Edit** column for the applicable review response notification.



The notification is opened in a configuration panel.



In this example a “Submission Correction” notification is being configured, but the configuration panel is the same for a Review Response notification.

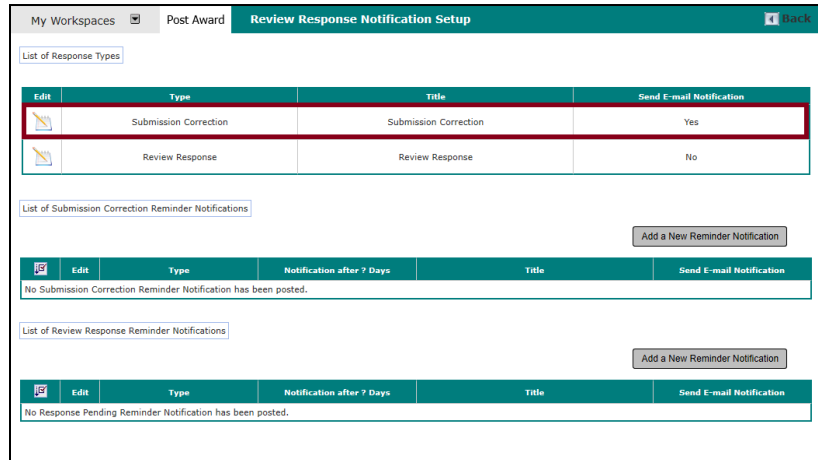
Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

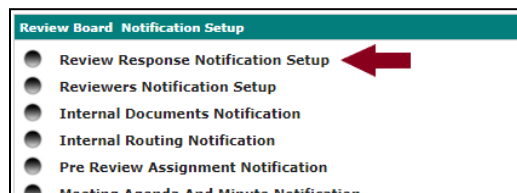


Correction / Response Reminder Notification Setup

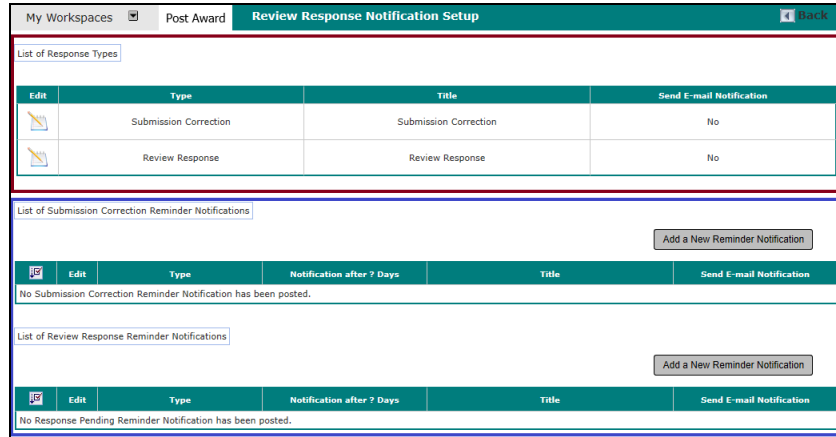
A review response notification is automatically sent to applicable project personnel when the review board returns a response or requests submission changes. Optionally, review response reminder notifications can also be configured to send when the board has not yet received a reply from the project personnel.

Both types of notification are configured on the **Review Response Notification Setup** page.

To access the page, navigate to [Module] > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

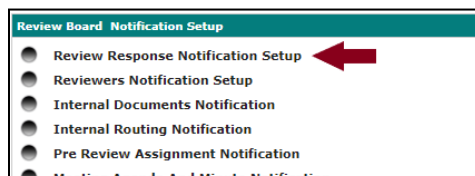
The red box encloses response notifications sent following a board review.

The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

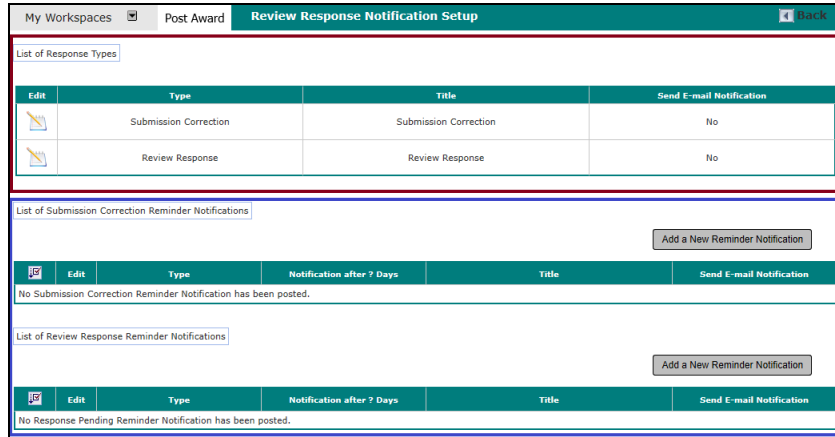
- Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study
- Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Configure Response Reminder Notification

Navigate to [Module] > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



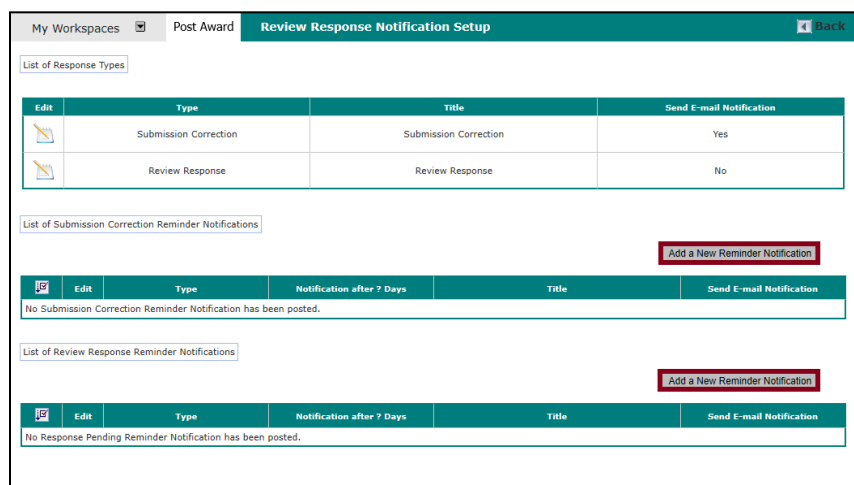
As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review.

The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

- Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study
- Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Click the **Add a New Reminder Notification** button for the applicable reminder notification.



The notification configuration panel opens. The same configuration form is used for both types of reminder notification.

Type of Notification: Submission Correction Reminder Notification

Title: Submission Corrections Required

Notification if within: 30 in days.

Send E-Mail Notification: Yes No

Send To: Principal Investigator Study Contact

E-mail Content: Submission corrections requested by the review board have not yet been received. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.

In this example a “Submission Correction Reminder Notification” is being configured.

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	Yes
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications

<input type="checkbox"/>	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
<input type="checkbox"/>		Submission Correction Reminder Notification	30 Days	Submission Corrections Required	Yes

List of Review Response Reminder Notifications

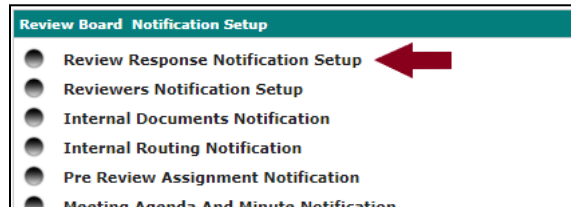
<input type="checkbox"/>	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Notice that the **Add a New Reminder Notification** button remains, indicating that additional reminder notifications of this type can be created. This is true for both reminder notification types.

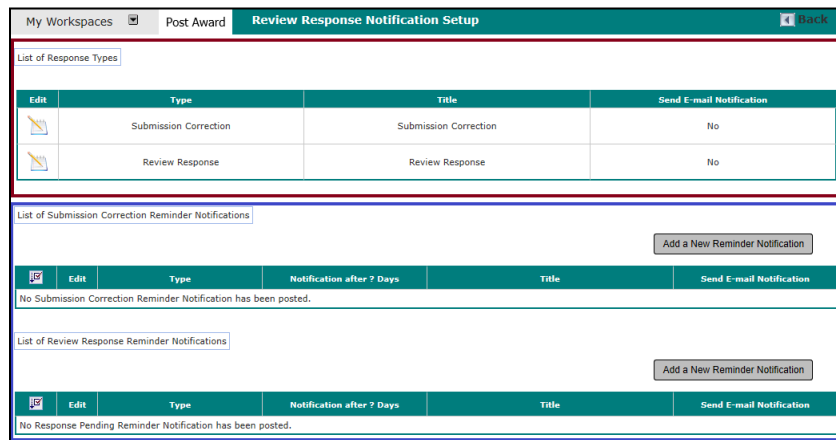
Also notice that an icon is now available in the **Edit** column for the configured reminder, indicating that it can be revised, and a **Delete Reminder Notification** button is now available as well. This is true for both reminder notification types when configured.

Edit Response Reminder Notification

Navigate to [Module] > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



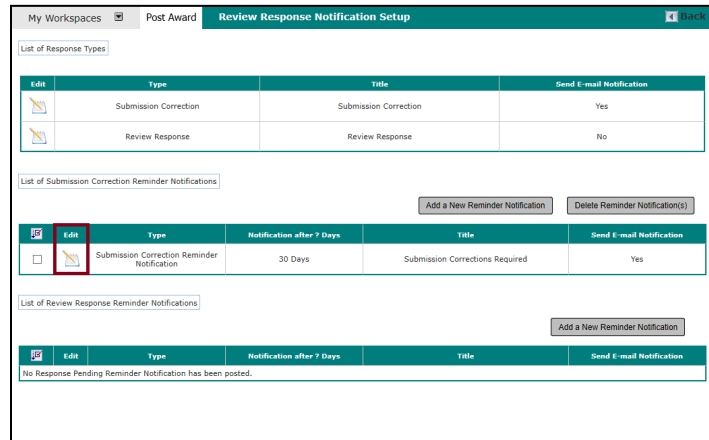
As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review.

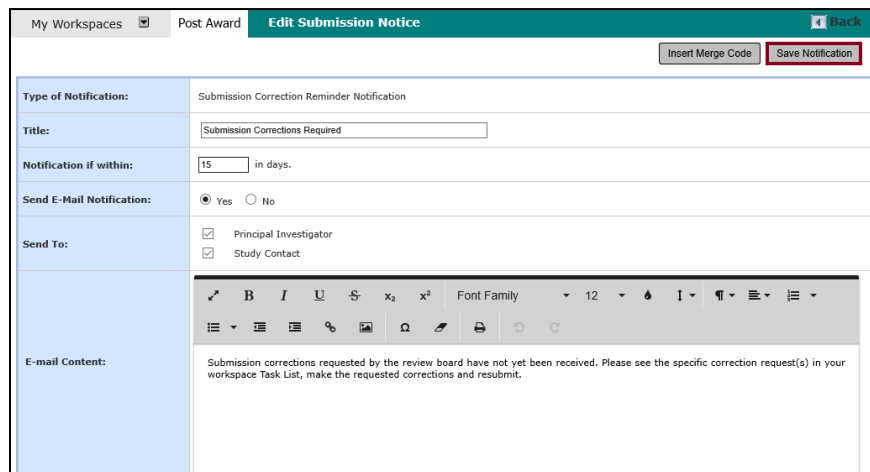
The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

- Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study
- Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Click the icon in the **Edit** column for the applicable reminder notification.



The notification is opened in a configuration panel.



In this example a “Submission Correction Reminder Notification” is being configured.

Make desired changes to the notification.

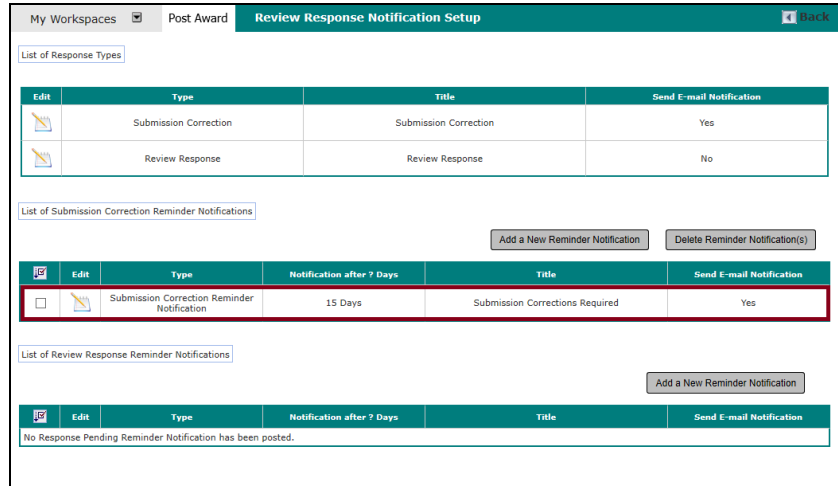
The **Title** field is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

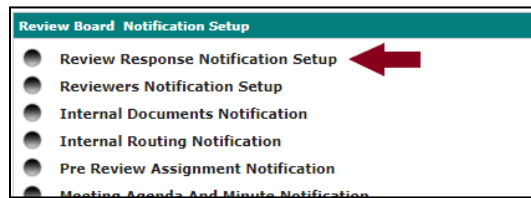
Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the configuration panel. The notification is revised on the notification setup page.

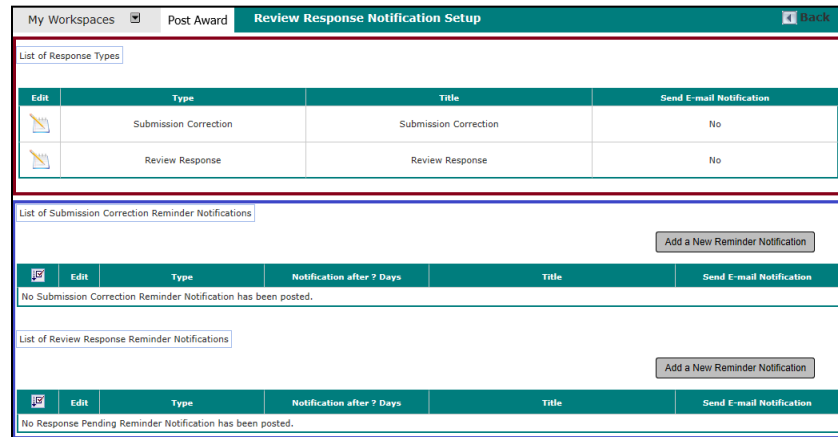


Delete Response Reminder Notification

Navigate to [Module] > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

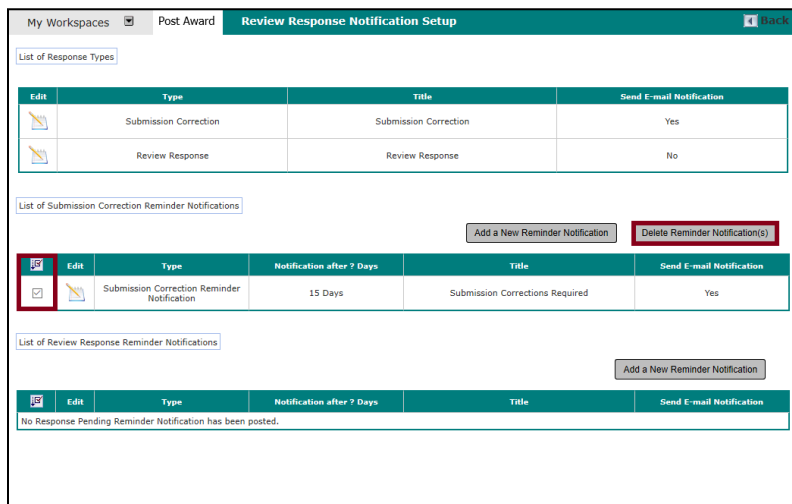
The red box encloses response notifications sent following a board review.

The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

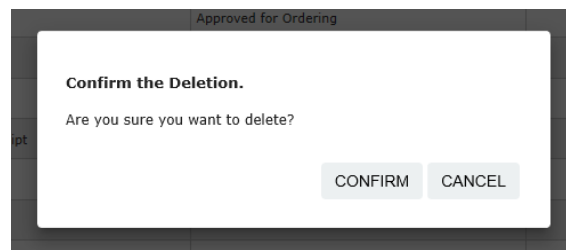
- Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the project personnel
- Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the project personnel

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox in the far-left column for the applicable reminder notification, then click the **Delete Reminder Notification(s)** button.

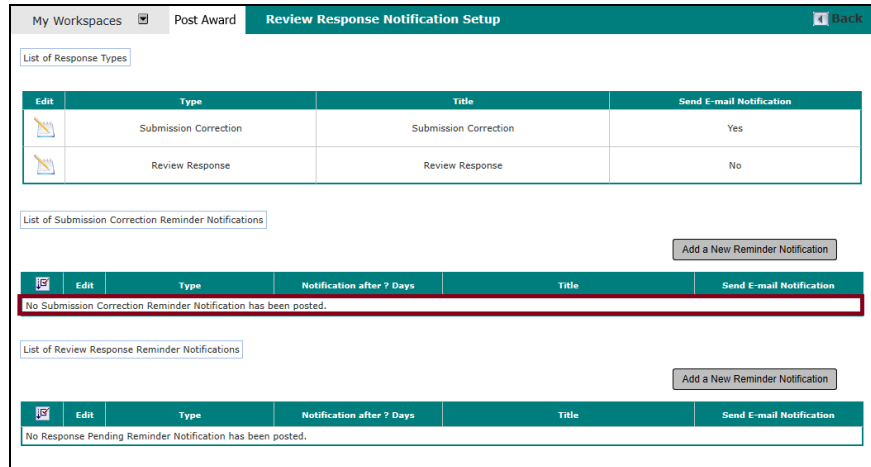


A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.



Notice that because no other reminder notifications of this type are configured, the **Delete Reminder Notification(s)** button no longer appears.

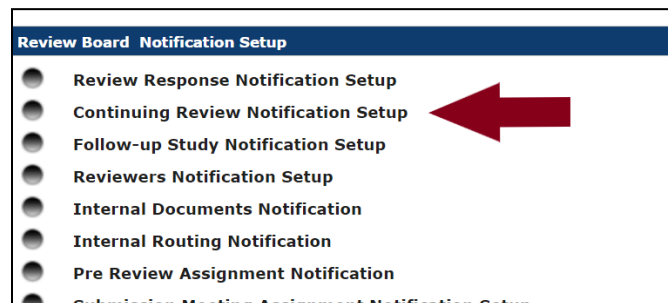
Continuing Review Notification

When configured, a reviewer notification is automatically sent to applicable project personnel / reviewer(s) when a new assignment is entered for a reviewer, a reviewer task is complete, or a reviewer is un-assigned from a task.

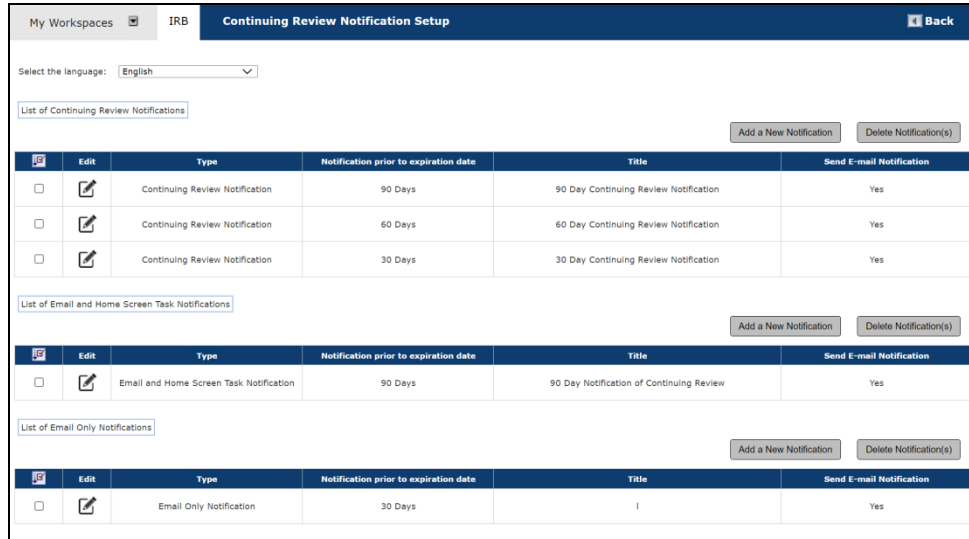
Reviewer reminder notifications can also be configured to automatically send when a reviewer task is assigned but has not yet been completed.

Both types of notification are configured on the **Continuing Review Notification Setup** page.

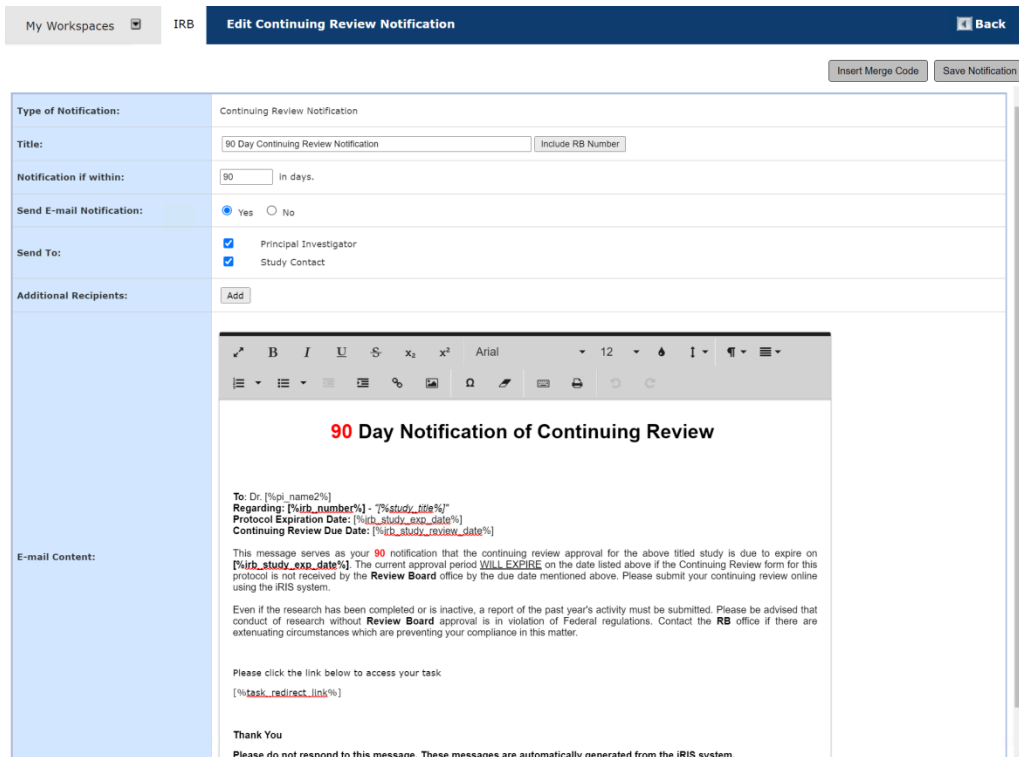
To access the page, navigate to [Module] > Review Board Administration > **Continuing Review Notification Setup** link.



The **Continuing Review Notification Setup** page opens.



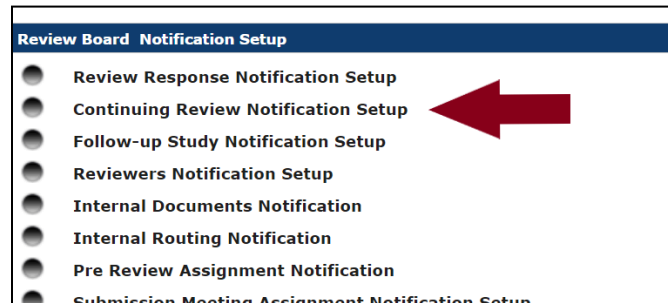
As shown in the screenshot above, three types of notification can be configured here: **Continuing Review Notifications**, **Email and Home Screen Task Notifications** and **Email Only Notifications**. All three notification types are configured in the **Edit Continuing Review Notification** page (shown below) and employ the same data fields.



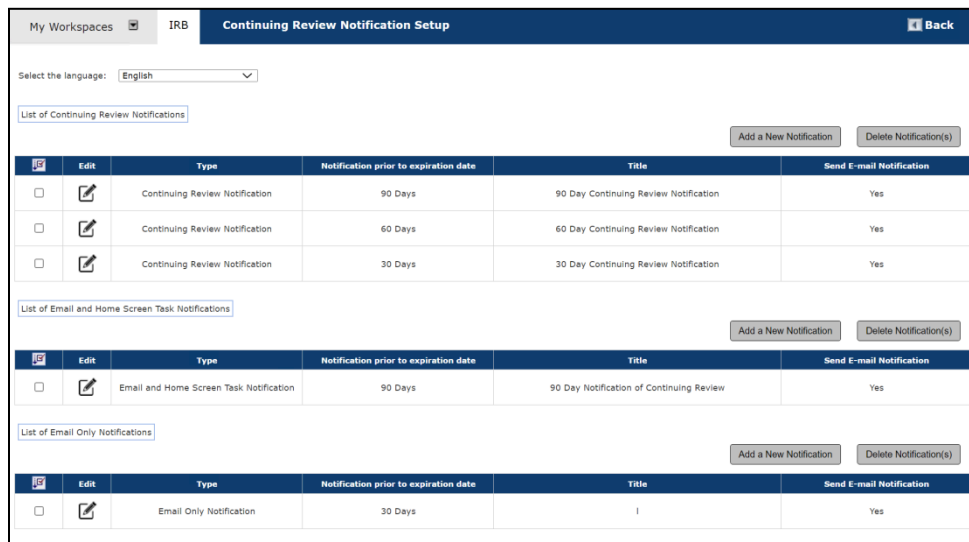
[more text needed here to explain the difference between the three types of notification]

Add Continuing Review Notification

Navigate to [Module] > Review Board Administration > **Continuing Review Notification Setup** link.



The **Continuing Review Notification Setup** page opens.



As shown in the screenshot above, three types of notification can be configured here: **Continuing Review Notifications**, **Email and Home Screen Task Notifications** and **Email Only Notifications**.

Click the **Add a New Notification** button for the desired notification type. The **Edit Continuing Review Notification** page opens for configuration of the notification.

The screenshot shows the 'Edit Continuing Review Notification' form. The form is titled 'Edit Continuing Review Notification' and has a 'Back' button in the top right corner. The form fields are as follows:

- Type of Notification:** Continuing Review Notification
- Title:** A text input field with an 'Include RB Number' button to its right.
- Notification if within:** 30 in days.
- Send E-mail Notification:** Yes (selected) or No.
- Send To:** Principal Investigator (checked) and Study Contact (checked).
- Additional Recipients:** An 'Add' button.
- E-mail Content:** A large text editor area with a rich text toolbar.

Buttons for 'Insert Merge Code' and 'Save Notification' are located at the top right of the form.

Enter the desired subject line of the notification email in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is configured on the notification setup page.

My Workspaces ▾ IRB **Continuing Review Notification Setup** Back

Select the language: English ▾

List of Continuing Review Notifications Add a New Notification Delete Notification(s)

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Continuing Review Notification	90 Days	90 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	60 Days	60 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	30 Days	30 Day Continuing Review Notification	Yes

List of Email and Home Screen Task Notifications Add a New Notification Delete Notification(s)

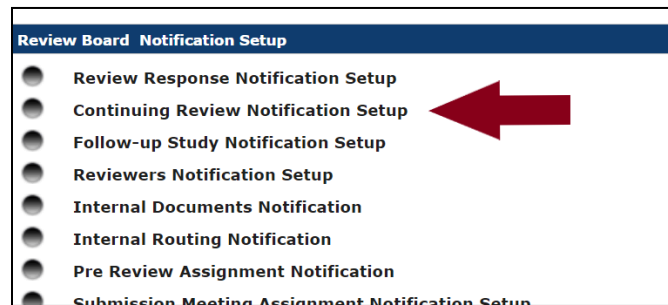
<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email and Home Screen Task Notification	90 Days	90 Day Notification of Continuing Review	Yes

List of Email Only Notifications Add a New Notification Delete Notification(s)

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email Only Notification	30 Days	I	Yes

Edit Continuing Review Notification

Navigate to [Module] > Review Board Administration > **Continuing Review Notification Setup** link.



The **Continuing Review Notification Setup** page opens.

My Workspaces ▾ IRB **Continuing Review Notification Setup** Back

Select the language: English ▾

List of Continuing Review Notifications Add a New Notification Delete Notification(s)

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Continuing Review Notification	90 Days	90 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	60 Days	60 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	30 Days	30 Day Continuing Review Notification	Yes

List of Email and Home Screen Task Notifications Add a New Notification Delete Notification(s)

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email and Home Screen Task Notification	90 Days	90 Day Notification of Continuing Review	Yes

List of Email Only Notifications Add a New Notification Delete Notification(s)

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email Only Notification	30 Days	I	Yes

As shown in the screenshot above, three types of notification can be configured here: **Continuing Review Notifications**, **Email and Home Screen Task Notifications** and **Email Only Notifications**.

Click the **Edit** icon for the applicable notification. The **Edit Continuing Review Notification** page opens for revision of the notification.

The screenshot displays the 'Edit Continuing Review Notification' interface. At the top, there are tabs for 'My Workspaces' and 'IRB', and a 'Back' button. Below these are 'Insert Merge Code' and 'Save Notification' buttons. The main form is divided into several sections:

- Type of Notification:** Continuing Review Notification
- Title:** 90 Day Continuing Review Notification. An 'Include RB Number' button is located to the right of the title field.
- Notification if within:** 90 in days.
- Send E-mail Notification:** Yes (selected) or No.
- Send To:** Checkboxes for 'Principal Investigator' and 'Study Contact', both of which are checked.
- Additional Recipients:** An 'Add' button.
- E-mail Content:** A rich text editor showing a preview of the notification email. The preview includes a subject line '90 Day Notification of Continuing Review', a recipient list 'To: Dr. [%pl_name2%]', and a body of text with merge codes for study title, IRB number, expiration date, and review due date. The body text states: 'This message serves as your 90 notification that the continuing review approval for the above titled study is due to expire on [%irb_study_exp_date%]. The current approval period WILL EXPIRE on the date listed above if the Continuing Review form for this protocol is not received by the Review Board office by the due date mentioned above. Please submit your continuing review online using the IRIS system. Even if the research has been completed or is inactive, a report of the past year's activity must be submitted. Please be advised that conduct of research without Review Board approval is in violation of Federal regulations. Contact the RB office if there are extenuating circumstances which are preventing your compliance in this matter. Please click the link below to access your task [%task_redirect_link%]. Thank You. Please do not respond to this message. These messages are automatically generated from the IRIS system.'

Make desired changes to the subject line of the notification email in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select "Yes" or "No" for **Send E-Mail Notification**. If "Yes" is selected the notification is sent to the recipient(s). If "No" is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the "Principal Investigator", "Study Contact"(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

Revise the boilerplate text and Merge Codes in the **E-Mail Content** text editor as desired. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is revised on the notification setup page.

My Workspaces | IRB | Continuing Review Notification Setup | Back

Select the language: English

List of Continuing Review Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Continuing Review Notification	90 Days	90 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	60 Days	60 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	30 Days	30 Day Continuing Review Notification	Yes

List of Email and Home Screen Task Notifications

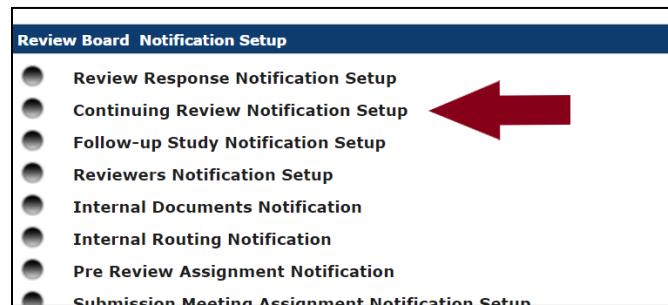
<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email and Home Screen Task Notification	90 Days	90 Day Notification of Continuing Review	Yes

List of Email Only Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email Only Notification	30 Days	I	Yes

Delete Continuing Review Notification

Navigate to [Module] > Review Board Administration > **Continuing Review Notification Setup** link.



The **Continuing Review Notification Setup** page opens.

My Workspaces | IRB | Continuing Review Notification Setup | Back

Select the language: English

List of Continuing Review Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Continuing Review Notification	90 Days	90 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	60 Days	60 Day Continuing Review Notification	Yes
<input type="checkbox"/>		Continuing Review Notification	30 Days	30 Day Continuing Review Notification	Yes

List of Email and Home Screen Task Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email and Home Screen Task Notification	90 Days	90 Day Notification of Continuing Review	Yes

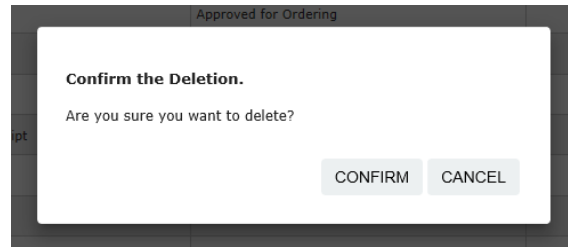
List of Email Only Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Email Only Notification	30 Days	I	Yes

As shown in the screenshot above, three types of notification can be configured here: **Continuing Review Notifications**, **Email and Home Screen Task Notifications** and **Email Only Notifications**.

Click to select the checkbox(es) for the notification(s) to be deleted in the applicable section of the page and click the **Delete Notification** button for the section (located immediately above each table, to the right).

A confirmation popup window displays.



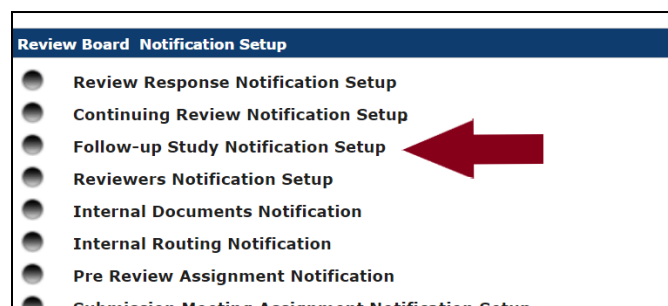
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The selected notification type is deleted from the notification setup page.

Follow-up Study Notification

The **Follow-up Study Notification** is an optional, more flexible type of notification than that provided for Continuing Review, in that it allows the institution to create notifications tied to various submission milestone dates (e.g., Initial IRB Approval) based on its own, internal policies and processes.

This type of notification is configured on the **Follow-up Study Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Follow-up Study Notification Setup** link.



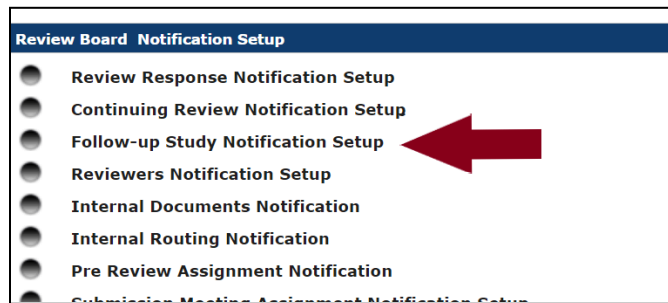
The **Follow-up Notification Setup** page opens.

	Edit	Type	Notification After Follow-Up	Title	Send E-mail Notification
<input type="checkbox"/>		Follow-up Notification	12 Months	Year 2 Follow-up (%irb_number%)	Yes

IMPORTANT NOTE: unlike most notifications in the system, this type is based on elapsed *months*, NOT *days*.

Add Follow-up Study Notification

Navigate to [Module] > Review Board Administration > **Follow-up Study Notification Setup** link.



The **Follow-up Notification Setup** page opens.

My Workspaces | IRB | **Follow-up Notification Setup** | Back

Insert Merge Code | Save Notification

Type of Notification: Follow-up Notification

Title: Include RB Number

Select Date To Fire Notification From: --none--

Send Notification after: 30 months of the selected date.

Send E-mail Notification: Yes No

Final Notification?: Yes No

Send To: Principal Investigator Study Contact

Additional Recipients:

E-mail Content:

B I U x₂ x²

Font Family 12

Enter the desired subject line of the notification email in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Click in the **Select Date To Fire Notification From** field to open a drop down picklist of milestone dates (e.g., IRB Initial Approval date). Click to select the desired item from the list.

IMPORTANT NOTE: unlike most notifications in the system, this type is based on elapsed *months*, NOT *days*. Enter the number of *months* after the selected milestone date the notification is to be sent in the **Send Notification after** field.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select “Yes” or “No” for **Final Notification**. Set this flag to “Yes” to if the notification serves as a final notice, meaning that no further notifications of this type will be sent after the first one (effectively turning this notification off).

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

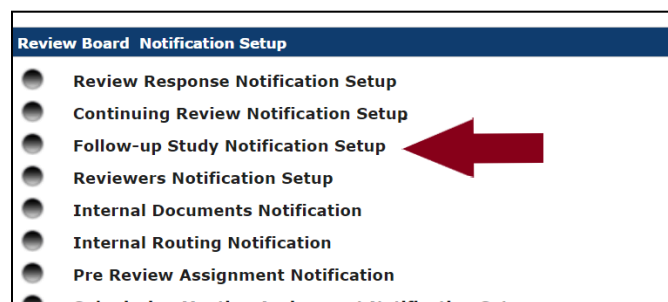
Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is configured on the notification setup page.



Edit Follow-up Study Notification Notification

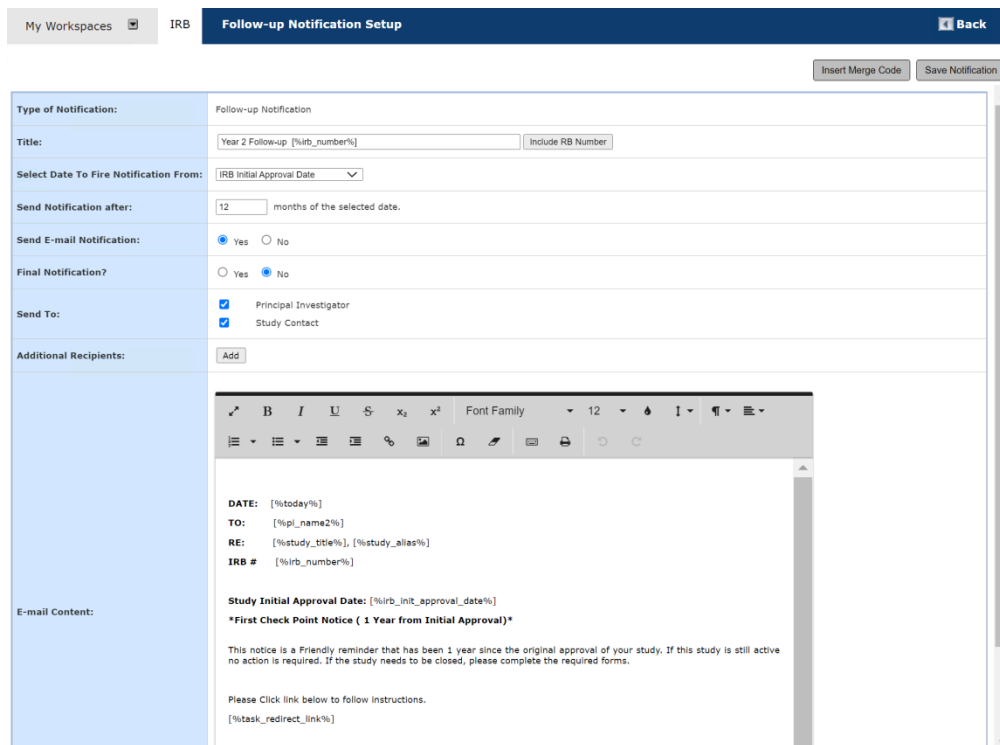
Navigate to [Module] > Review Board Administration > **Follow-up Study Notification Setup** link.



The **Follow-up Notification Setup** page opens.



Click the **Edit** icon for the notification. The **Follow-up Notification Setup** page opens for revision of the notification.



Revise the subject line of the notification email as desired in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Click in the **Select Date To Fire Notification From** field to open a drop down picklist of milestone dates (e.g., IRB Initial Approval date). Click to select the desired item from the list.

IMPORTANT NOTE: unlike most notifications in the system, this type is based on elapsed *months*, NOT *days*. Enter the number of *months* after the selected milestone date the notification is to be sent in the **Send Notification after** field.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select “Yes” or “No” for **Final Notification**. Set this flag to “Yes” to if the notification serves as a final notice, meaning that no further notifications of this type will be sent after the first one (effectively turning this notification off).

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

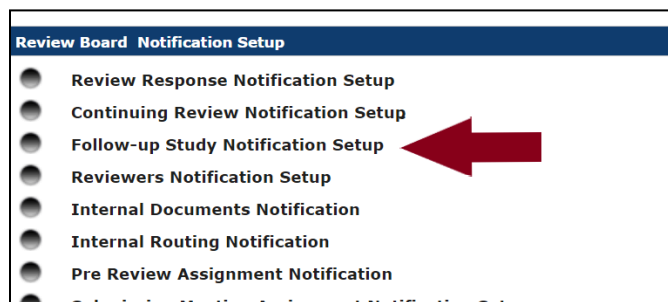
Revise the boilerplate text and Merge Codes in the **E-Mail Content** text editor as desired. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is revised on the notification setup page.



Delete Follow-up Study Notification Notification

Navigate to [Module] > Review Board Administration > **Follow-up Study Notification Setup** link.

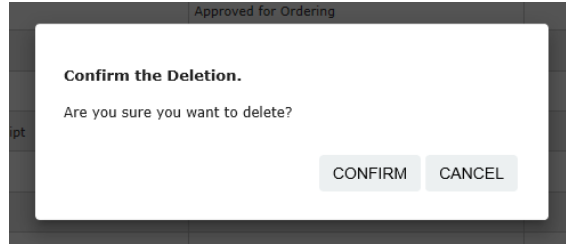


The **Follow-up Study Notification Setup** page opens.



Click to select the checkbox(es) for the notification(s) to be deleted and click the **Delete Notification** button.

A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is deleted from the notification setup page.

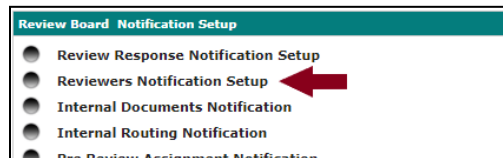
Reviewer Notifications

When configured, a reviewer notification is automatically sent to applicable project personnel / reviewer(s) when a new assignment is entered for a reviewer, a reviewer task is complete, or a reviewer is un-assigned from a task.

Reviewer reminder notifications can also be configured to automatically send when a reviewer task is assigned but has not yet been completed.

Both types of notification are configured on the **Reviewers Complete Notification** page.

To access the page, navigate to [Module] > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification


Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed. Notice that placeholders for these notifications are pre-populated, and while these notification types can be edited, they cannot be deleted. Notice also that no add buttons are provided for these notification types, only one version of each of these notifications can be configured at any time.

- the “Reviewers Complete” notification type is sent to the study Assigned Analyst when a review status is changed to complete
- the four “Reviewer Assignment” notification types (“Agenda”, “Expedited”, “Exempt”, “Process Administrative”) are sent to the Assigned Reviewer(s) when a new task for the applicable review type is assigned
- the “Reviewer Unassignment” notification type is sent to the applicable Assigned Reviewer when that reviewer’s task is un-assigned

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type. When configured, this notification type is automatically sent when a reviewer task is assigned but has not yet been completed.

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

- only one version of each reviewer complete/assignment/unassignment notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (“Reviewer Assignment Pending Reminder” notification type only) fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (“Reviewer Assignment Pending Reminder” notification type only) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

The same configuration panel is used for all six (6) of the reviewer complete/assignment/unassignment notification types.

Type of Notification:	Agenda Reviewer Assignment Notification
Title:	<input type="text" value="Agenda Reviewer Assignment"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> ↶ B <i>I</i> <u>U</u> S x₂ x² Font Family 12 🔥 ↑ ↓ ¶ ☰ ☷</div> <div style="border: 1px solid gray; padding: 5px;"> Be advised you have been assigned a reviewer task. Please see your workspace Task List for details of the assigned task. </div>

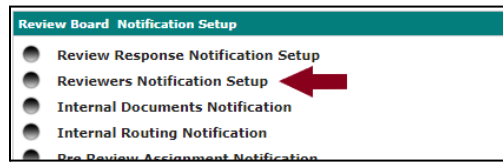
The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Edit Reviewer Notification

Navigate to [Module] > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

My Workspaces Post Award **Reviewers Complete Notification** Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.


The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

- only one version of each reviewer complete/assignment/unassigned notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

Click the icon in the **Edit** column for the applicable notification type.

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

The notification is opened in a configuration panel. The same configuration panel is used for all reviewer complete/assignment/unassignment notifications.

Insert Merge Code Save Notification

Type of Notification:	Agenda Reviewer Assignment Notification
Title:	<input type="text" value="Agenda Reviewer Assignment Notification"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid gray; padding: 5px;"> <div style="font-size: 0.8em; margin-bottom: 5px;"> ↶ B <i>I</i> <u>U</u> S x₂ x² Verdana 11 </div> <div style="font-size: 0.8em; margin-bottom: 5px;"> ☰ ☷ ☶ ☵ ☲ ☱ 🔗 🖼️ Ω ✍️ 🗑️ ↻ 🔄 </div> <p>Be advised you have been assigned a reviewer task. Please see your workspace Task List for details of the assigned task.</p> </div>

In this example an “Agenda Reviewer Assignment Notification” is being revised. Make desired changes to the notification.


The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. See the *Using Merge Codes in Notifications* section of this manual for more information.

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the notification setup page.

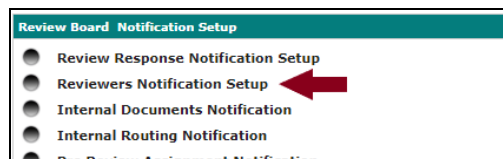
List of RB Reviewers Complete Notifications					
Edit	Type	Title	Send E-mail Notification	Action	
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification	

List of Reviewer Assignment Notifications					
Edit	Type	Title	Send E-mail Notification	Action	
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment Notification	Yes	Delete Notification	
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification	

List of Reviewer Assignment Reminders					
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

Delete Reviewer Notification

Navigate to [Module] > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

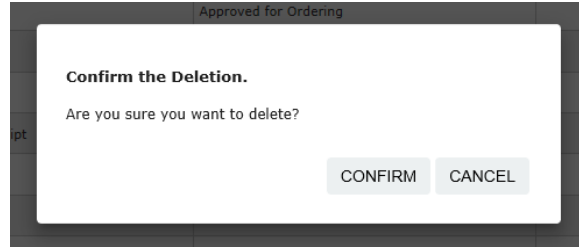
Click the **Delete Notification** button for the applicable notification.

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment Notification	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

List of RB Reviewers Complete Notifications					
Edit	Type	Title	Send E-mail Notification	Action	
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification	

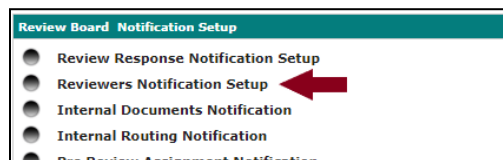
List of Reviewer Assignment Notifications					
Edit	Type	Title	Send E-mail Notification	Action	
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification	
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification	

List of Reviewer Assignment Reminders					
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Configure Reviewer Reminder

Navigate to [Module] > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

Click the “Reviewer Assignment Pending Reminder” **Add Notification** button. The notification configuration panel opens.

My Workspaces | Post Award | **Edit Reviewer Assignment Notifications** | Back

Insert Merge Code | Save Notification

Type of Notification: Reviewer Assignment Pending Reminder

Title: Incomplete Reviewer Assignment

Notify every ? Days: 30 in days.

Send E-Mail Notification: Yes No

E-mail Content:

Be advised you have an incomplete reviewer task. Please see your workspace Task List for details of the assigned task.

Enter the desired subject line of the notification email in the **Title** field.

Enter how frequently, in number of days, the reminder is to be re-sent until the review task is complete in the **Notify every ? Days** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. See the *Using Merge Codes in Notifications* section of this manual for more information.

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

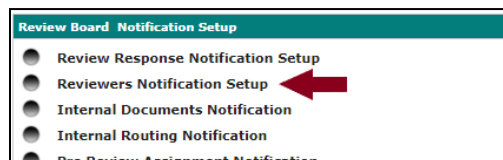
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Notify every 30 Days	Incomplete Reviewer Assignment	Yes	Delete Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised.

Edit Reviewer Reminder

Navigate to [Module] > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.


My Workspaces		Post Award		Reviewers Complete Notification		Back
List of RB Reviewers Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Reminders						
Edit	Type	When to Notify	Title	Send E-mail Notification	Action	
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification	

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

Click the **Edit** icon in the far-left column for the “Reviewer Assignment Pending Reminder” notification type (shown in screenshot below).

My Workspaces		Post Award		Reviewers Complete Notification		Back
List of RB Reviewers Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Reminders						
Edit	Type	When to Notify	Title	Send E-mail Notification	Action	
	Reviewer Assignment Pending Reminder	Notify every 30 Days	Incomplete Reviewer Assignment	Yes	Delete Notification	

The notification is opened in a configuration panel.

Make desired changes to the notification.

The **Title** field is used as the subject line in the notification e-mail.

The **Notify every ? Days** field specifies how frequently the reminder is to be re-sent until the task is complete.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the notification setup page.

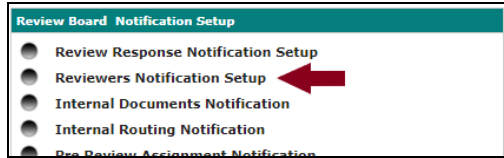
Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

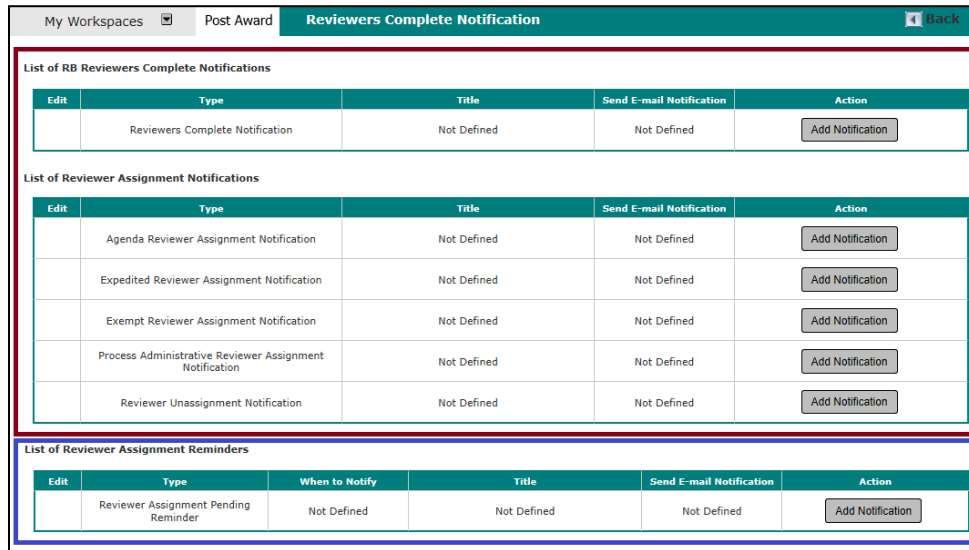
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Notify every 15 Days	Incomplete Reviewer Assignment	Yes	Delete Notification

Delete Reviewer Reminder

Navigate to [Module] > Review Board Administration > **Reviewers Notification Setup** link.



The Reviewers Complete Notification page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

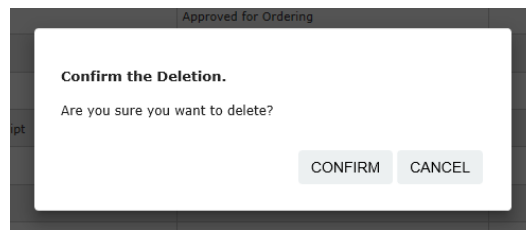
The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the “Reviewer Assignment Pending Reminder” **Delete Notification** button (shown in screenshot below).

My Workspaces		Post Award	Reviewers Complete Notification			Back
List of RB Reviewers Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Reminders						
Edit	Type	When to Notify	Title	Send E-mail Notification	Action	
	Reviewer Assignment Pending Reminder	Notify every 15 Days	Incomplete Reviewer Assignment	Yes	Delete Notification	

A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

My Workspaces		Post Award	Reviewers Complete Notification			Back
List of RB Reviewers Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification		
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification		
List of Reviewer Assignment Reminders						
Edit	Type	When to Notify	Title	Send E-mail Notification	Action	
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification	

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

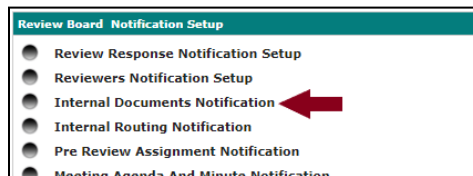
Internal Documents Notification

The review board can upload project/award documents internal to the review board and optionally, can send uploaded documents to specific iRIS™ users for review or response.

When configured, internal documents notifications are automatically sent to applicable project personnel to inform them they have been selected by the board to receive and/or review an internal board document.

This type of notification is configured on the **Setup Internal Document Notification** page.

To access the page, navigate to [Module] > Review Board Administration > **Internal Documents Notification Setup** link.



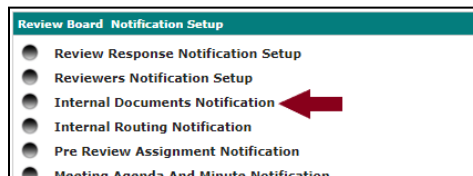
The **Setup Internal Document Notification** page opens.

My Workspaces		Post Award		Setup Internal Document Notification		Back
Edit	Type	Title	Send To	Action		
	Internal Document Notification	Not Defined	Not Defined	Add Notification		

Add Internal Documents Notification

Navigate to [Module] > Review Board Administration > **Internal Documents Notification Setup** link.

The **Setup Internal Document Notification** page opens.



Click the **Add Notification** button. A configuration panel opens.

This notification type does not have a content field. Text entered in the **Title** field doubles as the notification text. Bear this in mind when entering **Title** field text. In the example above the full text entered in the **Title** field is, “A document has been routed to you through iRIS for review/action. Please log in for details.”

*Note that the **Title** field has an eighty (80) character limit, including spaces.*

If there are specific iRIS™ users who typically need to be included in distribution of internal board documents, they can be added to the distribution list from this page. Later, when an internal board document is uploaded, if the board member elects to distribute the uploaded document additional project personnel and specific iRIS™ users can be added to the distribution list without altering the distribution list specified here.

Click the **Add** button to select specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		JHarp@msc.edu

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added on the **Setup Internal Document Notification** page.

If a user is added in error, select the checkbox to the left of that user’s name and click the **Delete** button to remove the user from distribution.

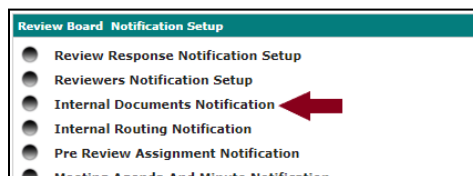
Click the **Save Notification** button. The notification is configured on the **Setup Internal Document Notification** page.

My Workspaces ▾		Post Award		Setup Internal Document Notification		⏪ Back	
Edit	Type	Title	Send To	Action			
	Internal Document Notification	A document has been routed to you through iRIS for review/action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification			

Notice that the **Add Notification** button has been replaced with a **Delete Notification** button, an Edit icon has been added for the notification, and the full **Title** field text is displayed.

Edit Internal Documents Notification

Navigate to [Module] > Review Board Administration > **Internal Documents Notification Setup** link.



The **Setup Internal Document Notification** page opens.

My Workspaces ▾		Post Award		Setup Internal Document Notification		⏪ Back	
Edit	Type	Title	Send To	Action			
	Internal Document Notification	A document has been routed to you through iRIS for review/action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification			

Click the icon in the **Edit** column. The notification is opened in a configuration panel.

Make desired changes in the configuration panel.

Text entered in the **Title** field doubles as the notification text. Bear this in mind when revising **Title** field text. In the example above text entered in the **Title** field is revised to say, “A document has been routed to you through iRIS for review or action. Please log in for details.”

*Note that the **Title** field has an eighty (80) character limit, including spaces.*

If there are specific iRIS™ users who typically need to be included in distribution of internal board documents, they can be added to the distribution list from this page. Later, when an internal board document is uploaded, if the board member elects to distribute the uploaded document additional project personnel and specific iRIS™ users can be added to the distribution list without altering the distribution list specified here.

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As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M., M.D., PhD		JHarp@msc.edu

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added on the **Setup Internal Document Notification** page.

If a user is added in error, select the checkbox to the left of that user’s name and click the **Delete** button to remove the user from distribution.

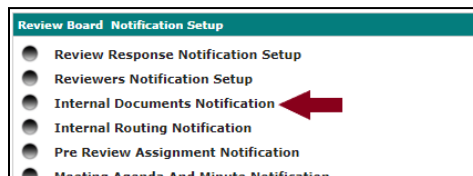
Click the **Save Notification** button. The notification is revised on the **Setup Internal Document Notification** page.

My Workspaces Post Award Setup Internal Document Notification Back				
Edit	Type	Title	Send To	Action
	Internal Document Notification	A document has been routed to you through iRIS for review or action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification

Notice that on this page, the full **Title** field text is displayed.

Delete Internal Documents Notification

Navigate to [Module] > Review Board Administration > **Internal Documents Notification Setup** link.

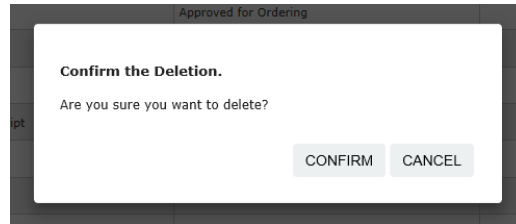


The **Setup Internal Document Notification** page opens.

My Workspaces Post Award Setup Internal Document Notification Back				
Edit	Type	Title	Send To	Action
	Internal Document Notification	A document has been routed to you through iRIS for review or action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification

CAUTION: Deleting the configured internal document notification de-configures the notification and removes its future association from any internal board documents. Until the notification is reconfigured, no notification will be sent when internal board documents previously associated with the now-unconfigured notification are sent.

Click the **Delete Notification** button. A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The notification is now unconfigured on the **Setup Internal Document Notification** page.

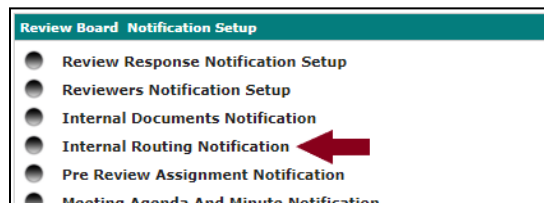
My Workspaces ▾ Post Award Setup Internal Document Notification Back				
Edit	Type	Title	Send To	Action
	Internal Document Notification	Not Defined	Not Defined	Add Notification

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification.

Internal Routing Notification

Internal submission routing signoff notifications can be configured in the iRIS™ system via a submission routing signoff notification setup page. When configured, these notifications are automatically sent to applicable project personnel when a transfer signoff task is initially assigned or completed. This type of notification is configured on the **Internal Routing Notification** page.

To access the page, navigate to [Module] > Review Board Administration > **Internal Routing Notification** link.



The **Internal Routing Notification** page opens.

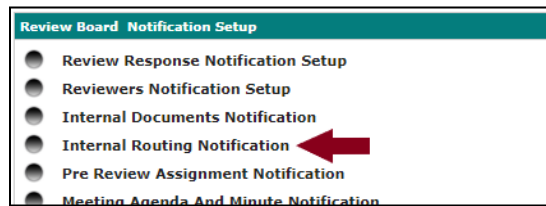
My Workspaces ▾ Post Award Internal Routing Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Routing Complete Notification	Not Defined	Not Defined	Add Notification

As shown in the screenshot above:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

Add Internal Routing Notification

Navigate to [Module] > Review Board Administration > **Internal Routing Notification** link.



The **Internal Routing Notification** page opens.

My Workspaces <input type="checkbox"/> Post Award Internal Routing Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Routing Complete Notification	Not Defined	Not Defined	Add Notification

Click the applicable **Add Notification** button. In this example, the **RB Internal Routing Complete Notification** is being configured.

My Workspaces Post Award **Edit RB Internal Routing Notification** Back

Type of Notification:	RB Internal Submission Routing Complete Notification
Title:	<input type="text" value="Internal Submission Routing Signoff Complete"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, x₂, x², Verdana, 11, Font color, Background color, Bulleted list, Numbered list, Indent, Outdent, Undo, Redo.</p> <p>Your study/protocol signoff task for [%rb_committee_name%] is complete. [%rb_chair_name1%]</p> </div>

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the applicable recipient(s) whose signoff/review task is complete. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

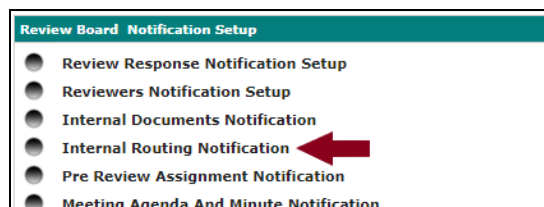
Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

Internal Routing Notification				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

Edit Internal Routing Notification

Navigate to [Module] > Review Board Administration > **Internal Routing Notification** link.



The **Internal Routing Notification** page opens.

Internal Routing Notification				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

Click the icon in the **Edit** column for the applicable notification. In this example, the **RB Internal Routing Signoff Notification** is being revised.

Make desired changes to the subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the applicable recipient(s) whose signoff/review task is complete. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

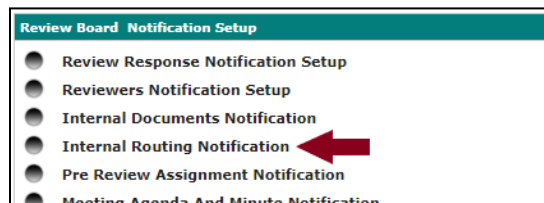
Make desired changes to boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the notification setup page.

Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff Task	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

Delete Internal Routing Notification

Navigate to [Module] > Review Board Administration > **Internal Routing Notification** link.



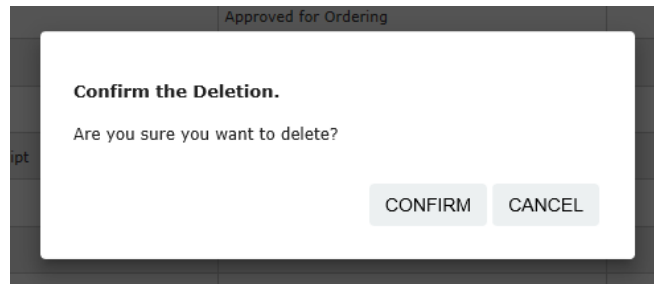
The **Internal Routing Notification** page opens.

My Workspaces ▾ Post Award Internal Routing Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff Task	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

CAUTION: Deleting the configured internal routing notification de-configures the notification. Until the notification is reconfigured, no notification will be sent when internal submission routing tasks are completed.

Click the applicable **Delete Notification** button. In this example the “RB Internal Submission Routing Complete Notification” is being deleted.

A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The notification is now unconfigured on the **Setup Internal Routing Notification** page.

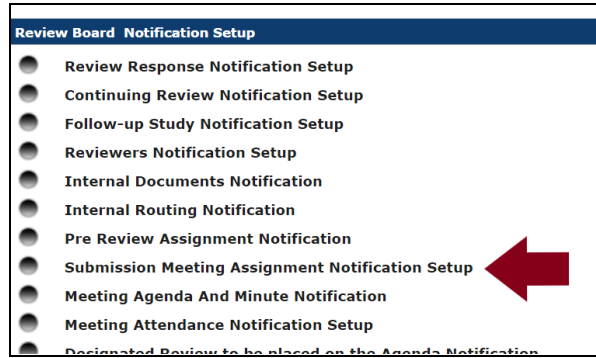
My Workspaces ▾ Post Award Internal Routing Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff Task	Yes	Delete Notification
	RB Internal Routing Complete Notification	Not Defined	Not Defined	Add Notification

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification.

Submission Meeting Assignment Notification

The **Submission Meeting Assignment Notification** is triggered any time a submission is assigned a meeting date. This type of notification is configured on the **Submission Meeting Assignment Notification Setup** page.

To access the page, navigate to [Module] > Review Board Administration > **Submission Meeting Assignment Notification Setup** link.



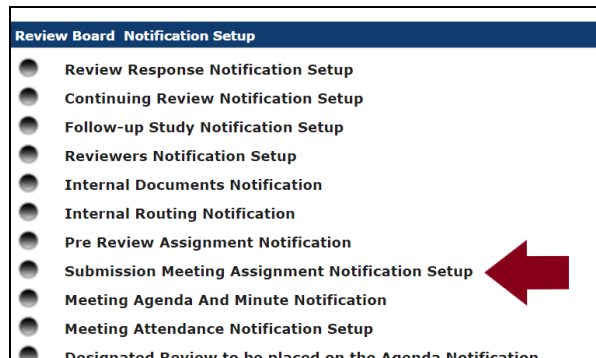
Click the link to open the **Submission Meeting Assignment Notification Setup** page.



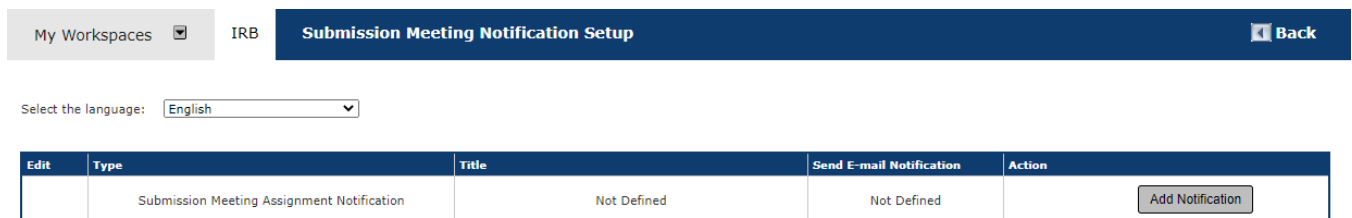
Notice that only one version of the notification can be configured.

Add Submission Meeting Assignment Notification

Navigate to [Module] > Review Board Administration > **Submission Meeting Assignment Notification Setup** link.



Click the link to open the **Submission Meeting Assignment Notification Setup** page.



Click the **Add Notification** button to open the **Edit Submission Meeting Assignment Notification** page.

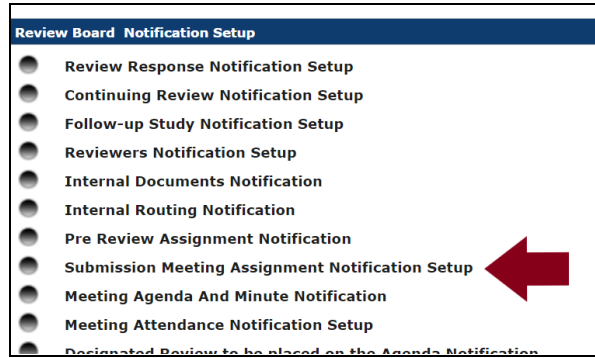
Enter a notification **Title**, select “Yes” or “No” for **Send E-mail Notification**, select the applicable checkbox(es) in the **Send To** field, and enter desired text and Merge Codes in the **E-mail Content** field.

Click the **Save Notification** button to save the notification, close the page and return to the setup home page, where the notification is now configured. Notice that the button label in the **Action** column is changed from **Add Notification** to **Delete Notification**.

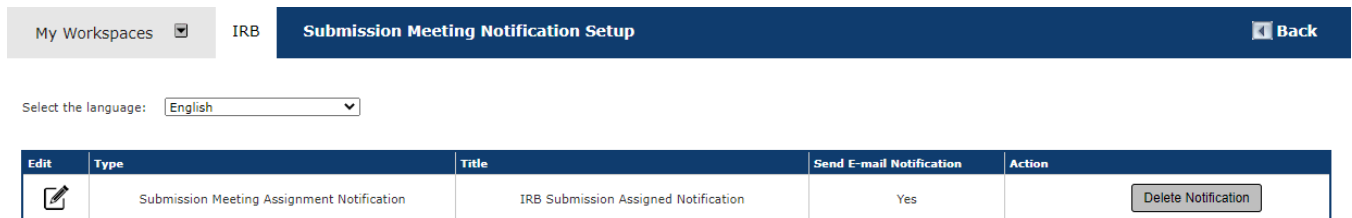
Edit	Type	Title	Send E-mail Notification	Action
	Submission Meeting Assignment Notification	IRB Submission Assigned Notification	Yes	

Edit Submission Meeting Assignment Notification

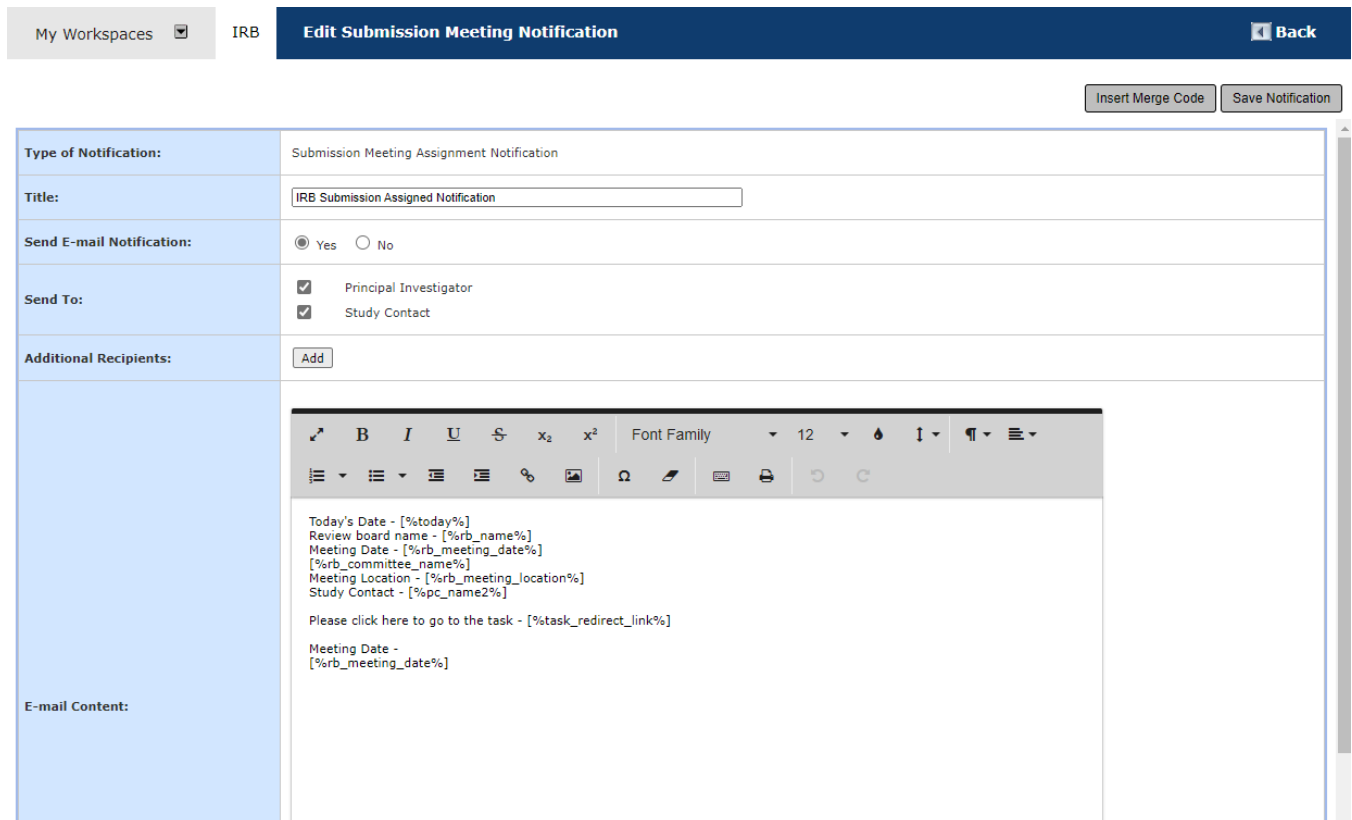
Navigate to [Module] > Review Board Administration > **Submission Meeting Assignment Notification Setup** link.



Click the link to open the **Submission Meeting Assignment Notification Setup** page.



Click the **Edit** icon to open the notification for revision in the **Edit Submission Meeting Assignment Notification** page.



Make desired changes to the notification **Title**, select “Yes” or “No” for **Send E-mail Notification**, select the applicable checkbox(es) in the **Send To** field, and revise text and Merge Codes as desired in the **E-mail Content** field.

Click the **Save Notification** button to save changes, close the page and return to the setup home page.

My Workspaces IRB **Submission Meeting Notification Setup** Back

Select the language:

Edit	Type	Title	Send E-mail Notification	Action
	Submission Meeting Assignment Notification	IRB Submission Assigned Notification	Yes	<input type="button" value="Delete Notification"/>

Delete Submission Meeting Assignment Notification

Navigate to [Module] > Review Board Administration > **Submission Meeting Assignment Notification Setup** link.

Review Board Notification Setup

- Review Response Notification Setup
- Continuing Review Notification Setup
- Follow-up Study Notification Setup
- Reviewers Notification Setup
- Internal Documents Notification
- Internal Routing Notification
- Pre Review Assignment Notification
- Submission Meeting Assignment Notification Setup**
- Meeting Agenda And Minute Notification
- Meeting Attendance Notification Setup
- Designated Review to be placed on the Agenda Notification

Click the link to open the **Submission Meeting Assignment Notification Setup** page.

My Workspaces IRB **Submission Meeting Notification Setup** Back

Select the language:

Edit	Type	Title	Send E-mail Notification	Action
	Submission Meeting Assignment Notification	IRB Submission Assigned Notification	Yes	<input type="button" value="Delete Notification"/>

Click the **Delete Notification** button to remove the notification from the system.

This notification is triggered any time a submission is assigned a meeting date. This may be done in numerous steps within submission processing and can be completely independent of review process assignments.

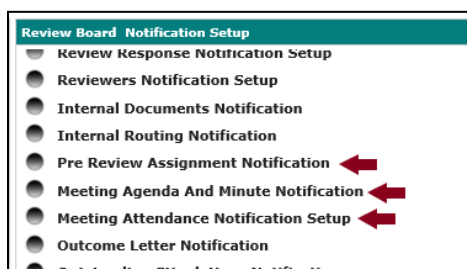
For example, if a Coordinator assigns a submission a *Full Committee Review* process but does not specify a meeting date, the new meeting assignment notification is not sent. However, if at a later time they return and assign the submission to a meeting, the notification is triggered.

Meeting Notifications

The iRIS™ system allows for configuration of four (4) general categories of notification related to review board meetings:

- Pre Review notifications alert attendees who must complete a review task before the meeting, and are automatically sent to intended attendees when the meeting is scheduled
- Meeting Agenda notifications inform intended attendees a revised or finalized copy of the agenda is available, and are automatically sent when changes are saved to the agenda
- Meeting Minute notifications inform attendees a draft or finalized copy of meeting minutes is available, and are automatically sent when draft meeting minutes are saved
- Meeting Attendance notifications either request that intended attendees set their meeting availability (automatically sent to intended attendees when the meeting is scheduled) or inform the Coordinator that an intended attendee has changed their availability (automatically sent to Coordinator when the intended attendee takes that action)

The configuration pages for these notification types are accessed via [Module] > Review Board Administration > [applicable notification link].

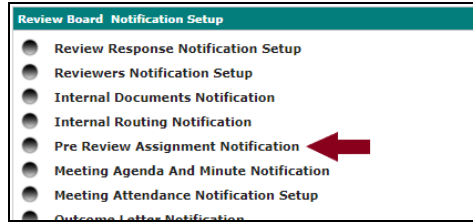


Pre Review Notification

Pre Review notifications can be configured to automatically alert review board meeting attendees who must complete a prereview task prior to attending the meeting. Up to four (4) different prereview notification types are available for configuration (depending on the institution's review board settings), each for a different review type:

- Prereview Agenda Assignment Notification, for full board reviews
- Prereview Expedite Notification, for expedited reviews
- Prereview Exempt Notification, for exempt reviews
- Prereview Administrative Notification, for administrative reviews

All four (4) of these notification types are configured via the **Prereview Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Pre Review Assignment Notification** link.



The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Prereview Expedite Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Prereview Exempt Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Prereview Administrative Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

The configuration form for all four (4) of these notification types is the same.

Type of Notification:	Prereview Agenda Assignment Notification
Title:	<input type="text" value="Prereview Agenda Assignment"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="font-size: small; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Font Family 12 </div> <p>Be advised that you have been assigned a prereview agenda task for the [%b_meeting_date%] review board meeting. Please review your workspace Task List and complete the assigned task before the meeting.</p> <p>[%b_name%]</p> </div>

The **Title** field is used as the subject line in the notification e-mail.

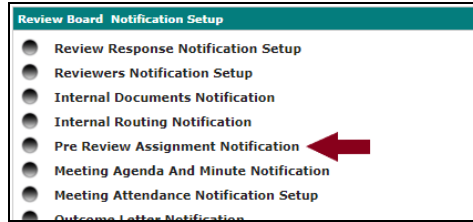
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field specifies whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Pre Review Notification

Navigate to [Module] > Review Board Administration > **Pre Review Assignment Notification** link.



The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Not Defined	Not Defined	Add Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Click the **Add Notification** button for the applicable notification type. The **Edit Prereview Notification** page opens for configuration of the notification. The same configuration form is used for all four (4) prereview notification types.

Insert Merge Code **Save Notification**

Type of Notification:	Prereview Agenda Assignment Notification
Title:	<input type="text" value="Prereview Agenda Assignment"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid gray; padding: 5px;"> <p>Be advised that you have been assigned a prereview agenda task for the [%rb_meeting_date%] review board meeting. Please review your workspace Task List and complete the assigned task before the meeting.</p> <p>[%rb_name%]</p> </div>

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select the checkbox for “Principal Investigator”, “Study Contact” or both to specify which project personnel should receive the notification in the **Send To** field.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the **Edit Prereview Notification** page. The notification is configured on the notification setup page.

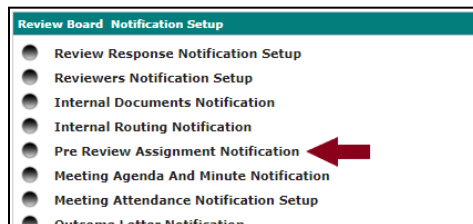
Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all prereview notifications when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised.

Edit Pre Review Notification

Navigate to [Module] > Review Board Administration > **Pre Review Assignment Notification** link.



The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Click the icon in the **Edit** column for the applicable notification type. The notification is opened in the **Edit Prereview Notification** page. The same configuration form is used for all four (4) prereview notification types.

Insert Merge Code Save Notification

Type of Notification:	Prereview Agenda Assignment Notification
Title:	<input type="text" value="Prereview Agenda Assignment Notification"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid gray; padding: 5px;"> <p>Be advised that you have been assigned a prereview agenda task for the [%rb_meeting_date%] review board meeting. Please review your workspace Task List and complete the assigned task before the meeting.</p> <p>[%rb_name%]</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select the checkbox for “Principal Investigator”, “Study Contact” or both to specify which project personnel should receive the notification in the **Send To** field.

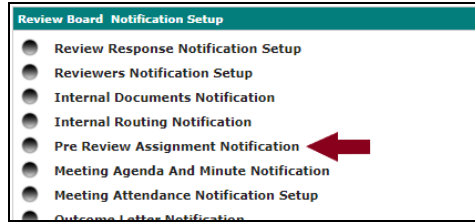
Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the **Edit Prereview Notification** page. The notification is revised on the notification setup page.

Prereview Notification Setup Back				
Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment Notification	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Delete Pre Review Notification

Navigate to [Module] > Review Board Administration > **Pre Review Assignment Notification** link.

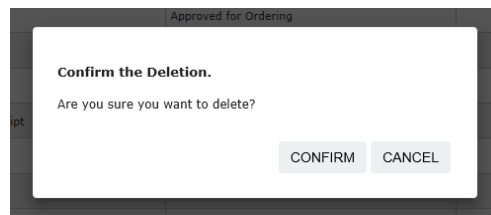


The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment Notification	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Notification** button for the applicable notification type. A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

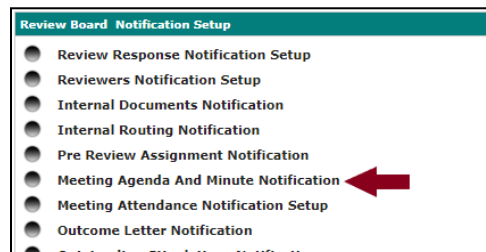
Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Not Defined	Not Defined	Add Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Meeting Agenda And Minute Notifications

Four different types of meeting agenda and minute notifications can be configured to automatically alert attendees to changes in agenda and minutes status:

- Revised Meeting Agenda Notification, sent to all committee members when the agenda is revised
- Final Meeting Agenda Notification, sent to all committee members when the agenda is finalized
- Draft Meeting Minute Notification, sent to attendees marked “present” during the meeting when draft minutes are prepared
- Final Meeting Minute Notification, sent to attendees marked “present” during the meeting when finalized minutes are published

All four (4) of these notification types are configured via the **Meeting Agenda and Minute Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.



The **Meeting Agenda and Minute Notification Setup** page opens.

My Workspaces <input type="checkbox"/>		Post Award		Meeting Agenda and Minute Notification Setup		Back
Edit	Type	Title	Send E-mail Notification	Action		
	Final Meeting Agenda Notification	Not Defined	Not Defined	Add Notification		
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification		
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification		
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification		

The configuration form for all four (4) of these notification types is the same.

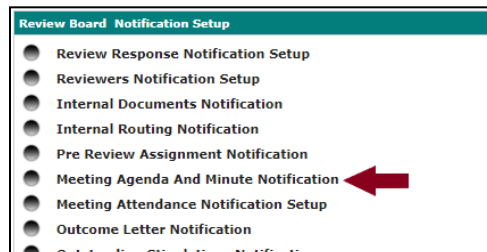
The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Meeting Agenda / Minute Notification

Navigate to [Module] > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.



The **Meeting Agenda and Minute Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

Click the applicable **Add Notification** button.

A configuration form is opened for creation of the notification. The configuration form for all four (4) of these notification types is the same.

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

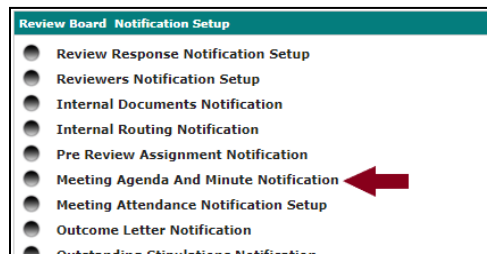
Click the **Save Notification** button. The notification is configured on the **Meeting Agenda and Minute Notification Setup** page.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Final Meeting Agenda Published	Yes	Delete Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all meeting agenda and minute notifications when configured.

Edit Meeting Agenda / Minute Notification

Navigate to [Module] > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.



The **Meeting Agenda and Minute Notification Setup** page opens.

My Workspaces	Post Award	Meeting Agenda and Minute Notification Setup			Back
Edit	Type	Title	Send E-mail Notification	Action	
	Final Meeting Agenda Notification	Final Meeting Agenda Published	Yes	Delete Notification	
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification	
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification	
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification	

Click the icon in the **Edit** column for the applicable notification.

The notification is opened in a configuration form for editing. The configuration form for all four (4) of these notification types is the same.

Insert Merge Code Save Notification

Type of Notification: RB Final Meeting Agenda Notification

Title: Final Meeting Agenda Notification

Send E-Mail Notification: Yes No

E-mail Content:

The finalized agenda for the upcoming [%rb_meeting_date%] board meeting has been published.

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

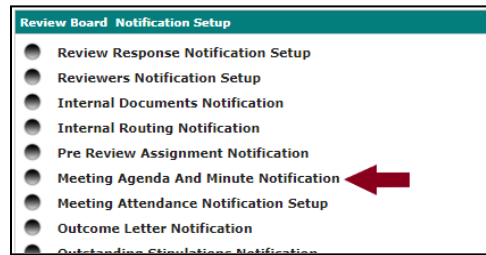
Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the configuration form. The notification is revised on the **Meeting Agenda and Minute Notification Setup** page.

My Workspaces	Post Award	Meeting Agenda and Minute Notification Setup			Back
Edit	Type	Title	Send E-mail Notification	Action	
	Final Meeting Agenda Notification	Final Meeting Agenda Notification	Yes	Delete Notification	
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification	
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification	
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification	

Delete Meeting Agenda / Minute Notification

Navigate to [Module] > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.

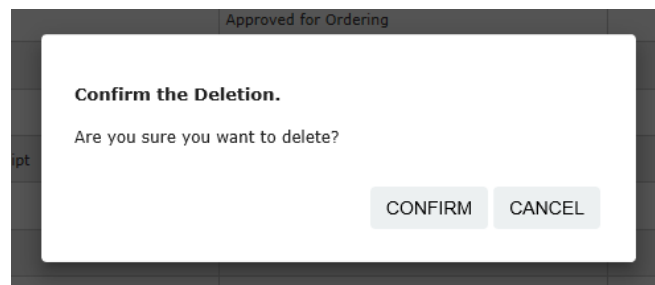


The **Meeting Agenda and Minute Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Final Meeting Agenda Notification	Yes	Delete Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Notification** button for the applicable notification. A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

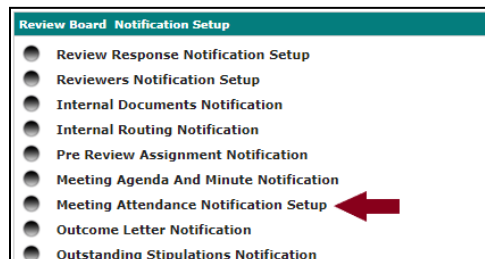
Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Meeting Attendance Notification Setup

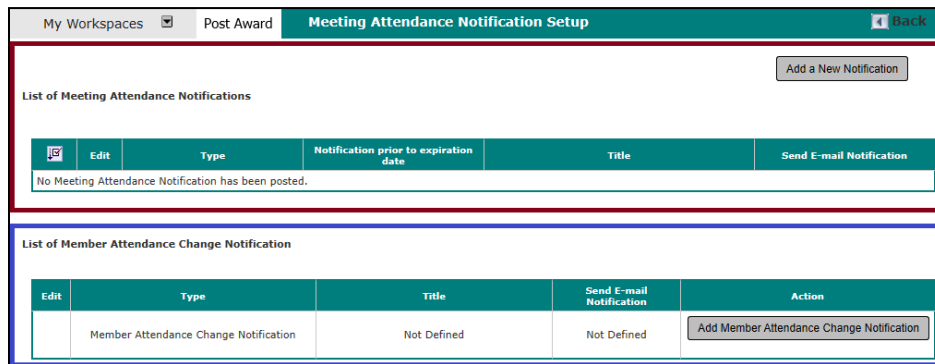
Two types of meeting attendance notification can be configured.

- the Meeting Attendance Notification is automatically sent to intended meeting attendees when the meeting is scheduled, and requests that the attendee set their availability for the meeting
- the Member Attendance Change Notification is automatically sent to the Coordinator when any intended attendee changes their meeting availability status

Both notification types are configured via the **Meeting Attendance Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.



The **Meeting Attendance Notification Setup** page opens.



As highlighted by the red box in the screenshot above, the Meeting Attendance Notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.

As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.

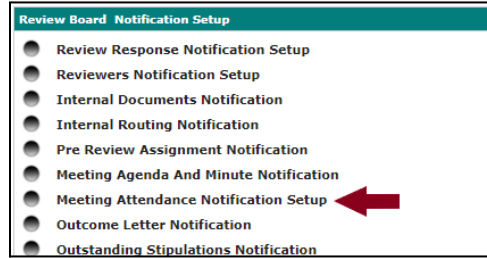
[Add a New Notification](#) [Delete Notification\(s\)](#)

List of Meeting Attendance Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	30 Days	Member Attendance Notification	Yes

Add Meeting Attendance Notification

Navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.



The **Meeting Attendance Notification Setup** page opens.

My Workspaces ▼ Post Award **Meeting Attendance Notification Setup** Back

[Add a New Notification](#)

List of Meeting Attendance Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

As highlighted by the red box in the screenshot above, the Meeting Attendance notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.

As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.

[Add a New Notification](#) [Delete Notification\(s\)](#)

List of Meeting Attendance Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	30 Days	Member Attendance Notification	Yes

Click the **Add a New Notification** button.

The **Edit Meeting Attendance Notification** page opens.

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the meeting date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is added to the list in the upper portion of the **Meeting Attendance Setup** page.

List of Meeting Attendance Notifications					
<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	30 Days	Please Set Meeting Availability	Yes

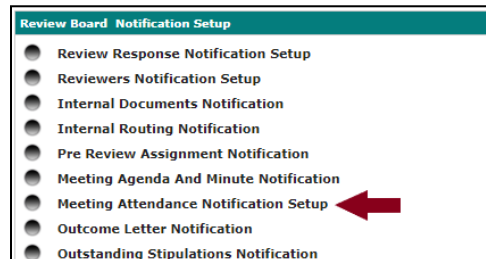
Add a New Notification Delete Notification(s)

List of Member Attendance Change Notification				
Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

Notice that an **Edit** icon is provided for the notification, and a **Delete Notification** button is added for the list.

Edit Meeting Attendance Notification

Navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.



The **Meeting Attendance Notification Setup** page opens.

Meeting Attendance Notification Setup					
List of Meeting Attendance Notifications					Add a New Notification
<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					
List of Member Attendance Change Notification					
Edit	Type	Title	Send E-mail Notification	Action	
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification	

As highlighted by the red box in the screenshot above, the Meeting Attendance notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.


As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.

List of Meeting Attendance Notifications

<input checked="" type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	30 Days	Member Attendance Notification	Yes

Click the icon in the **Edit** column for the applicable notification.

List of Meeting Attendance Notifications

<input checked="" type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	30 Days	Please Set Meeting Availability	Yes

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
<input type="checkbox"/>	Member Attendance Change Notification	Not Defined	Not Defined	<input type="button" value="Add Member Attendance Change Notification"/>

The notification is opened for editing in the **Edit Meeting Attendance Notification** page.

Type of Notification:	Meeting Attendance Notification
Title:	<input type="text" value="Please Set Meeting Availability"/>
Notification if within:	<input type="text" value="15"/> in days.
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid gray; padding: 5px;"> <p>Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, x₂, x², Font Face (Verdana), Font Size (11), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Undo, Redo.</p> <p>You are on the list of attendees for one or more upcoming board or committee meeting(s). Please login to iRIS to set your availability.</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the meeting date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is revised in the upper portion of the **Meeting Attendance Setup** page.

List of Meeting Attendance Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	15 Days	Please Set Meeting Availability	Yes

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	<input type="button" value="Add Member Attendance Change Notification"/>

Delete Meeting Attendance Notification

Navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.

Review Board Notification Setup

- Review Response Notification Setup
- Reviewers Notification Setup
- Internal Documents Notification
- Internal Routing Notification
- Pre Review Assignment Notification
- Meeting Agenda And Minute Notification
- Meeting Attendance Notification Setup
- Outcome Letter Notification
- Outstanding Stipulations Notification

The **Meeting Attendance Notification Setup** page opens.

Meeting Attendance Notification Setup

List of Meeting Attendance Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	<input type="button" value="Add Member Attendance Change Notification"/>

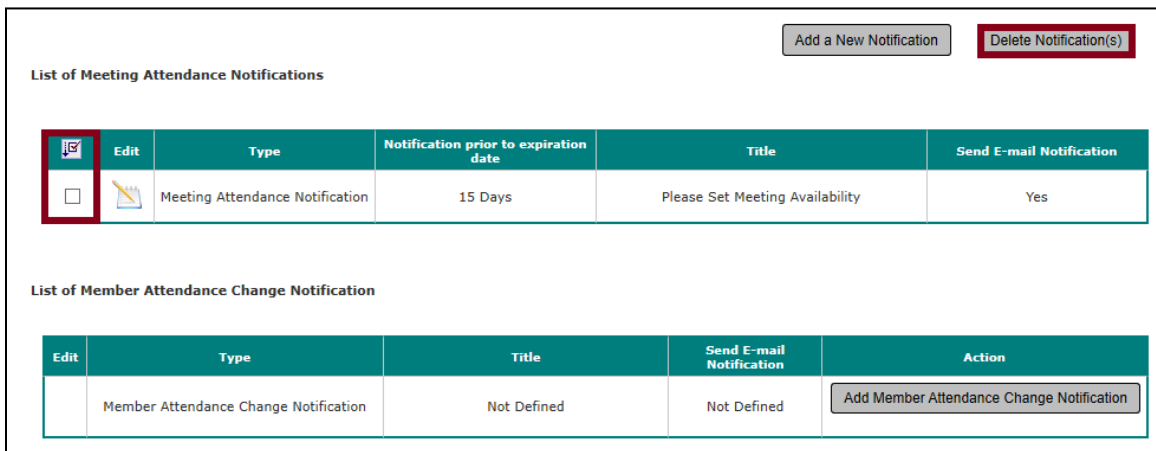
As highlighted by the red box in the screenshot above, the Meeting Attendance notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.

As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.

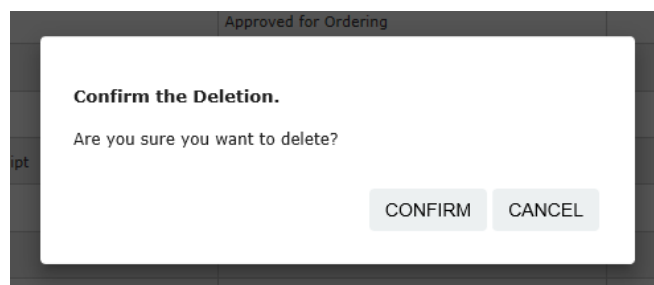


CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox in the far-left column for the applicable notification and click the **Delete Notification** button.

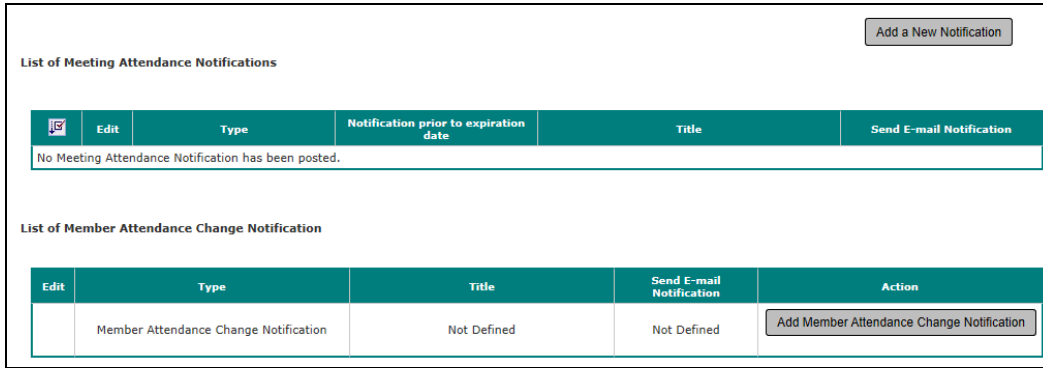


A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.



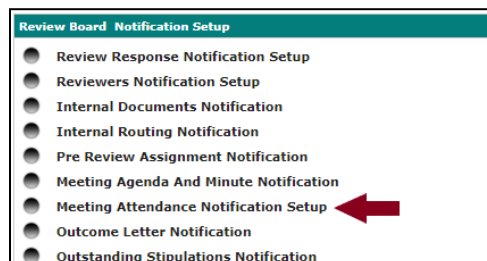
Notice that in this example, because the notification list is now empty, the **Edit** icon and **Delete Notification** button no longer appear.

Meeting Attendance Change Notification Setup

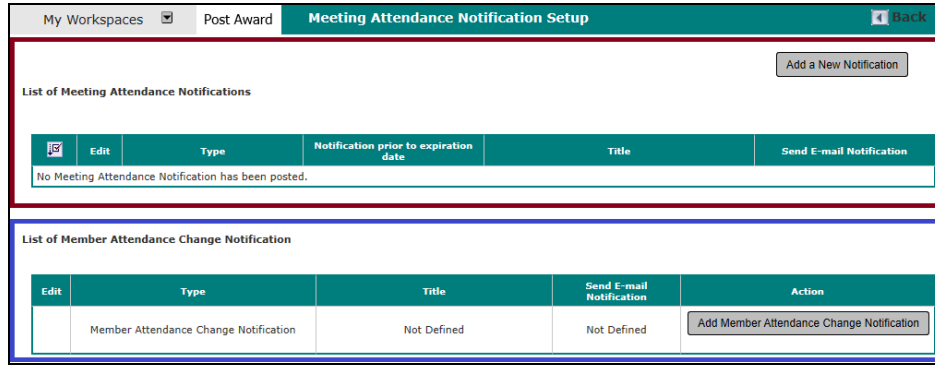
Two types of meeting attendance notification can be configured.

- the Meeting Attendance Notification is automatically sent to intended meeting attendees when the meeting is scheduled, and requests that the attendee set their availability for the meeting
- the Member Attendance Change Notification is automatically sent to the Coordinator when any intended attendee changes their meeting availability status

Both notification types are configured via the **Meeting Attendance Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.

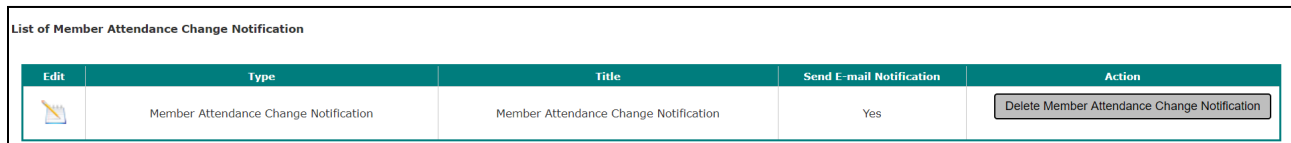


The **Meeting Attendance Notification Setup** page opens.



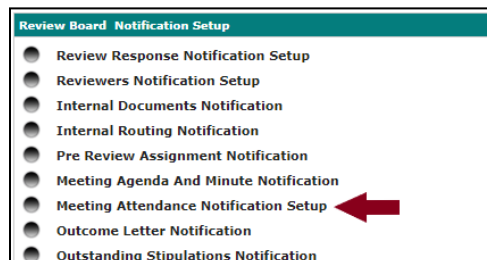
As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to “Not Defined” and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add a New Notification** button, indicating that only one notification of this type can be configured.

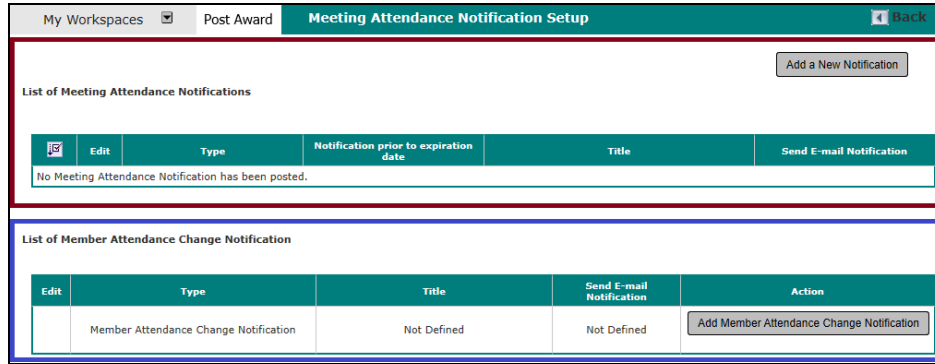


Add Meeting Attendance Change Notification

Navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.

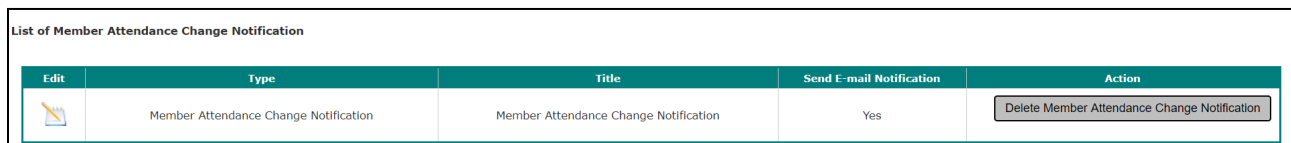


The **Meeting Attendance Notification Setup** page opens.

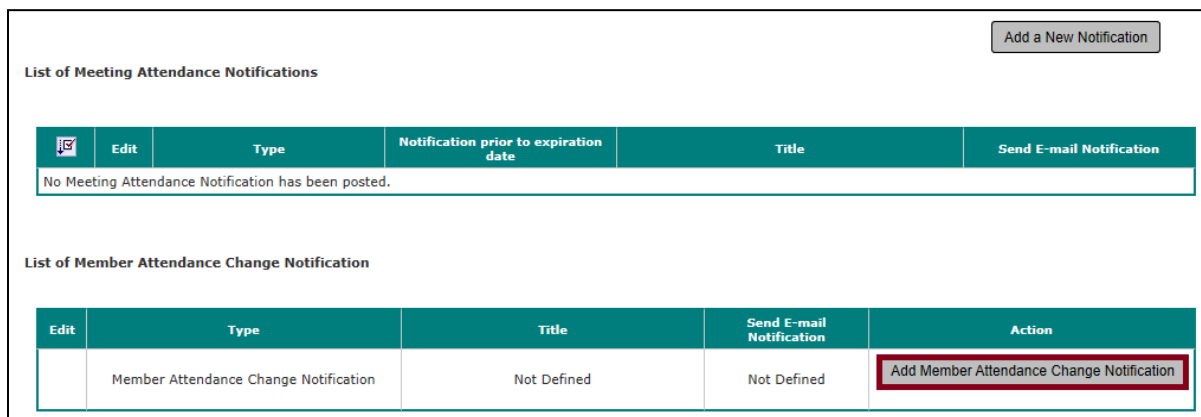


As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to “Not Defined” and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add a New Notification** button, indicating that only one notification of this type can be configured.



When the notification is unconfigured, click the **Add Member Attendance Change Notification** button.



The **Edit Meeting Attendance Notification** page opens.

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the meeting date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is configured in the lower portion of the **Meeting Attendance Setup** page.

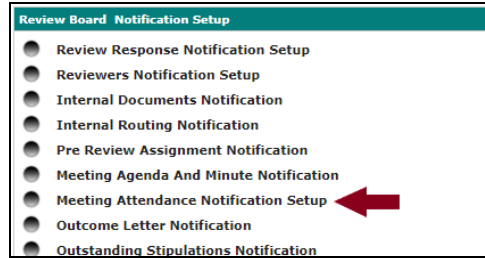
List of Meeting Attendance Notifications					
Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification	
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification					
Edit	Type	Title	Send E-mail Notification	Action	
	Member Attendance Change Notification	Member Attendance Change Notification	Yes	Delete Member Attendance Change Notification	

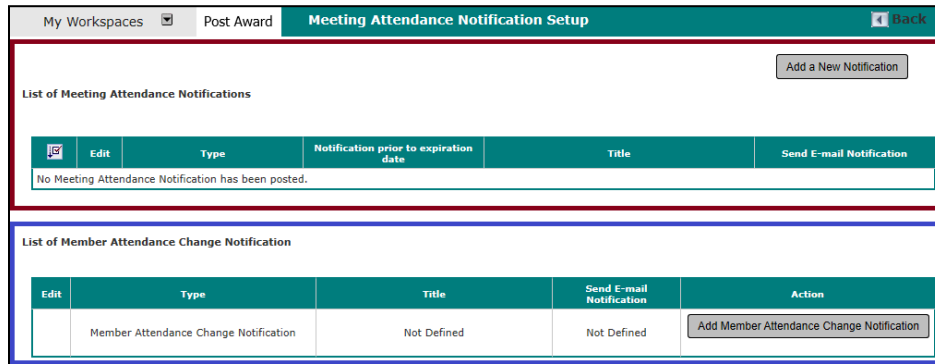
As shown in the screenshot above, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add Member Attendance Notification** button, indicating that only one notification of this type can be configured.

Edit Meeting Attendance Change Notification

Navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.

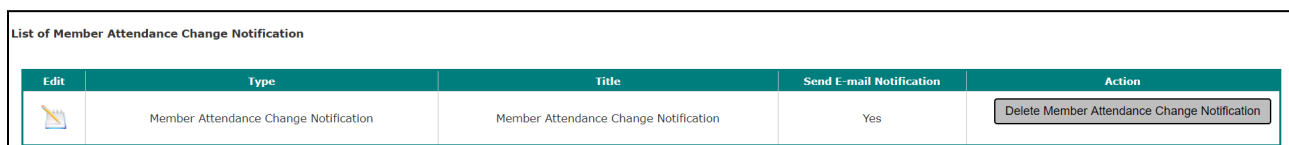


The Meeting Attendance Notification Setup page opens.



As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to “Not Defined” and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add Member Attendance Notification** button, indicating that only one notification of this type can be configured.



When the notification is configured, click its **Edit** icon.

List of Meeting Attendance Notifications					
	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification				
Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Changes	Yes	Delete Member Attendance Change Notification

Delete Meeting Attendance Change Notification

Navigate to [Module] > Review Board Administration > **Meeting Attendance Notification Setup** link.

Review Board Notification Setup	
<input type="radio"/>	Review Response Notification Setup
<input type="radio"/>	Reviewers Notification Setup
<input type="radio"/>	Internal Documents Notification
<input type="radio"/>	Internal Routing Notification
<input type="radio"/>	Pre Review Assignment Notification
<input type="radio"/>	Meeting Agenda And Minute Notification
<input checked="" type="radio"/>	Meeting Attendance Notification Setup
<input type="radio"/>	Outcome Letter Notification
<input type="radio"/>	Outstanding Stipulations Notification


The **Meeting Attendance Notification Setup** page opens.

My Workspaces		Post Award	Meeting Attendance Notification Setup			Back
List of Meeting Attendance Notifications						
	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification	Add a New Notification
No Meeting Attendance Notification has been posted.						
List of Member Attendance Change Notification						
Edit	Type	Title	Send E-mail Notification	Action		
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification		

As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to “Not Defined” and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add Member Attendance Notification** button, indicating that only one notification of this type can be configured.

List of Member Attendance Change Notification


Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Change Notification	Yes	Delete Member Attendance Change Notification

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.


Click the **Delete Member Attendance Change Notification** button.

[Add a New Notification](#)

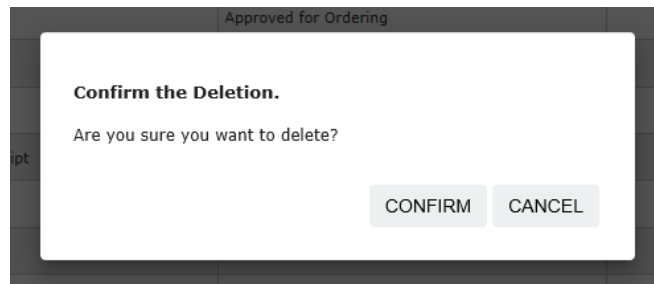
List of Meeting Attendance Notifications

 Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.				

List of Member Attendance Change Notification


Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Changes	Yes	Delete Member Attendance Change Notification

A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

List of Meeting Attendance Notifications					
	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

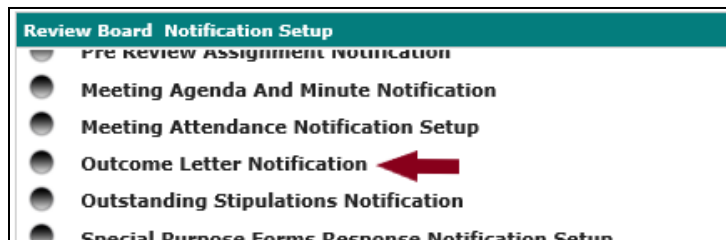
List of Member Attendance Change Notification				
Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	<input type="button" value="Add Member Attendance Change Notification"/>

Outcome Letter Notifications

Three types of review board outcome notifications can be configured in the iRIS™ system:

- RB Outcome Letter Notification, automatically sent to applicable project personnel when an outcome letter is sent
- Outcome Signoff Letter Notification, automatically sent to applicable project personnel when an outcome letter signoff task is assigned
- Outcome Signoff Complete Notification, automatically sent to the Assigned Analyst when an outcome letter signoff task is completed

All three notification types are configured via the **RB Outcome Letter Notification** page. To access the page, navigate to [Module] > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.

My Workspaces ▾ Post Award **RB Outcome Letter Notification** Back

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Not Defined	Not Defined	Add RB Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

The **RB Outcome Letter Notification** is set up via the top section of the page (red box).


The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).

The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

As shown in the screenshot below, the configuration page for all three of these notification types contains the same fields.

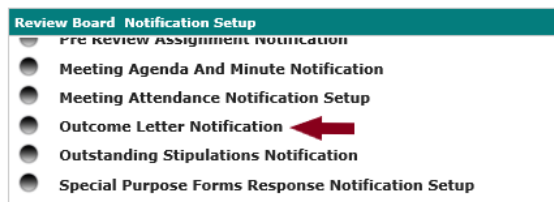
The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Outcome Letter Notification

Navigate to [Module] > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.

My Workspaces		Post Award		RB Outcome Letter Notification		Back
List of RB Outcome Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	RB Outcome Letter Notification	Not Defined	Not Defined	Add RB Outcome Letter Notification		
List of Outcome Signoff Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification		
List of Outcome Signoff Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification		


The **RB Outcome Letter Notification** is set up via the top section of the page (red box).

The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).

The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

List of RB Outcome Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification		
List of Outcome Signoff Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification		
List of Outcome Signoff Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification		

Click the applicable Add button to configure the desired notification type. The selected notification type is opened in the **Edit RB Outcome Letter Notification** page.

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration page. The notification is configured on the **RB Outcome Letter Notification** page.

List of RB Outcome Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

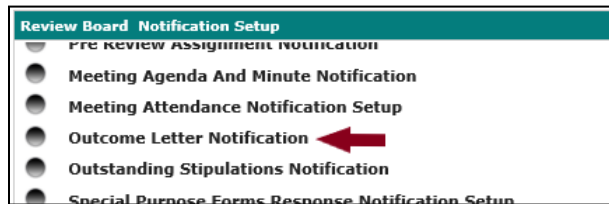
List of Outcome Signoff Complete Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all outcome letter notifications when configured.

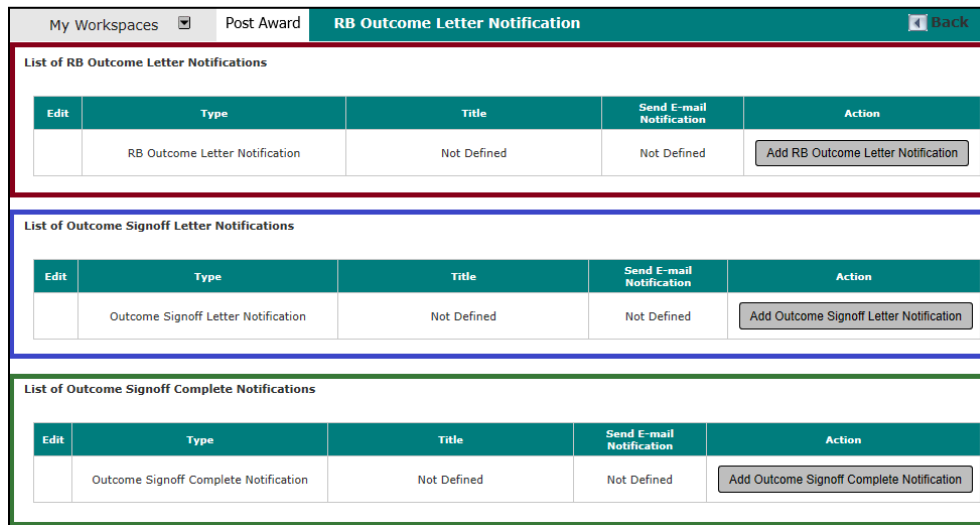
Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for all outcome letter notifications when configured.

Edit Outcome Letter Notification

Navigate to [Module] > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.



The **RB Outcome Letter Notification** is set up via the top section of the page (red box).


The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).

The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications


Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Click the icon in the **Edit** column for the applicable notification type.

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

The selected notification type is opened for editing in the **Edit RB Outcome Letter Notification** page.

Insert Merge Code **Save Notification**

Type of Notification:	RB Outcome Letter Notification
Title:	Review Board Outcome Letter Notification
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Be advised the review board has generated an outcome letter for one or more study(ies) to which you are assigned. Please log in to iRIS to view the letter(s).</p> <p>[%rb_name%]</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the configuration panel. The notification is revised on the **RB Outcome Letter Notification** page.

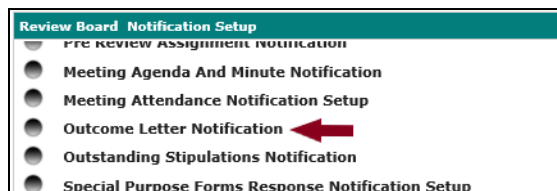
List of RB Outcome Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Review Board Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Delete Outcome Letter Notification

Navigate to [Module] > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.

My Workspaces		Post Award		RB Outcome Letter Notification		Back
List of RB Outcome Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	RB Outcome Letter Notification	Not Defined	Not Defined	Add RB Outcome Letter Notification		
List of Outcome Signoff Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification		
List of Outcome Signoff Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification		


The **RB Outcome Letter Notification** is set up via the top section of the page (red box).

The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).

The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

List of RB Outcome Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification		
List of Outcome Signoff Letter Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification		
List of Outcome Signoff Complete Notifications						
Edit	Type	Title	Send E-mail Notification	Action		
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification		

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

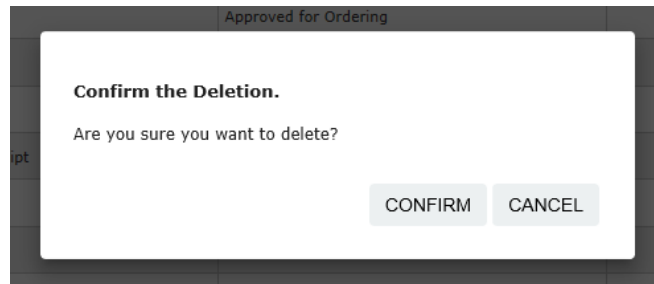
Click the delete button for the applicable notification type.

List of RB Outcome Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Review Board Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

List of RB Outcome Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Not Defined	Not Defined	Add RB Outcome Letter Notification

List of Outcome Signoff Letter Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

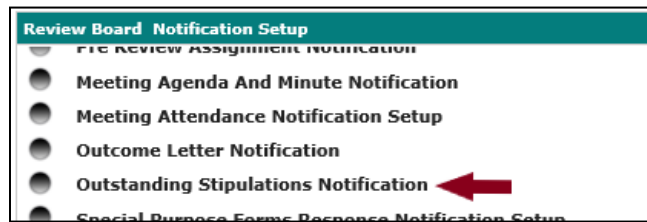
List of Outcome Signoff Complete Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

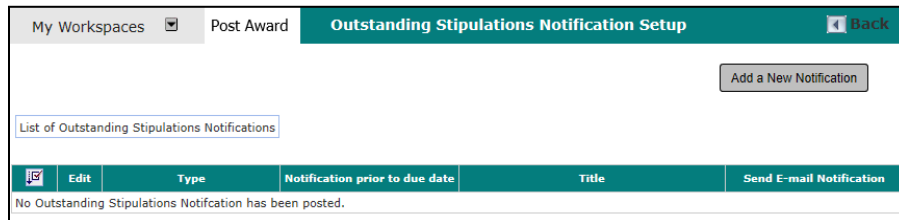
Outstanding Stipulations Notifications

Outstanding stipulation notifications can be configured to automatically alert applicable project personnel (generally the PI, Study Contact, and Assigned Analyst) when a stipulation is entered. Different versions of this notification type can be configured to address different stipulation requests.

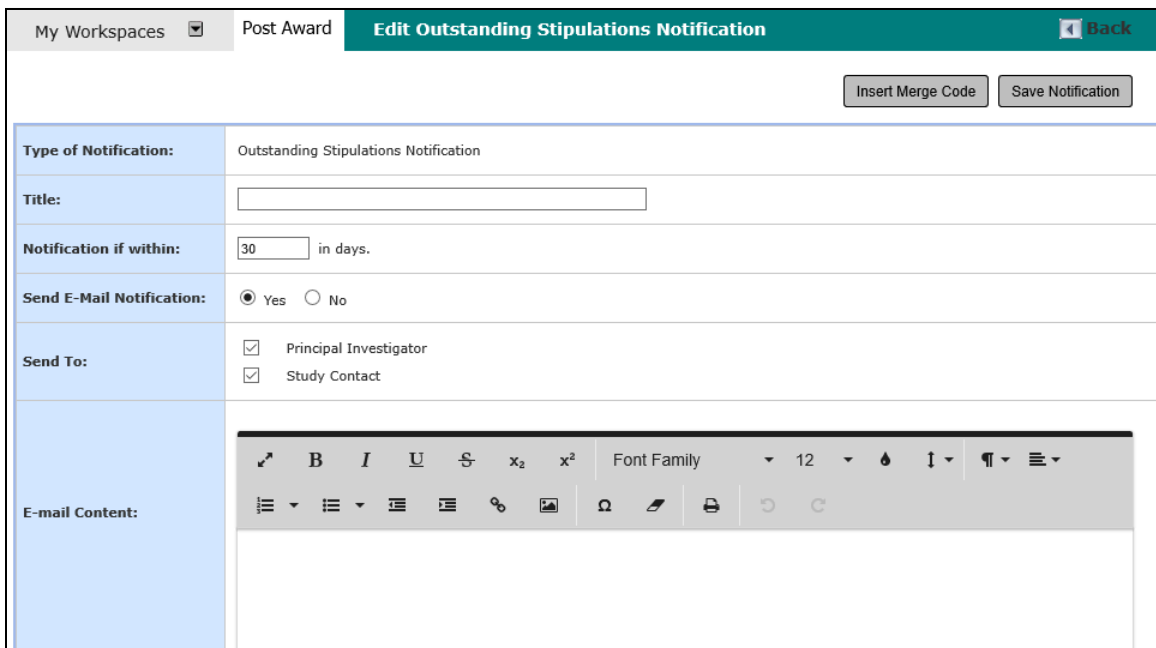
This type of notification is configured on the **Outstanding Stipulations Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Outstanding Stipulations Notification** link.



The **Outstanding Stipulations Notification Setup** page is opened.



The **Edit Outstanding Stipulations Notification** page is used for configuration of this notification type.



The **Title** field is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

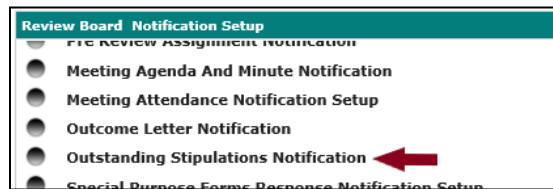
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select checkboxes for “Principal Investigator” and “Study Contact” are provided in the **Send To** field, to specify which project personnel should receive the notification.

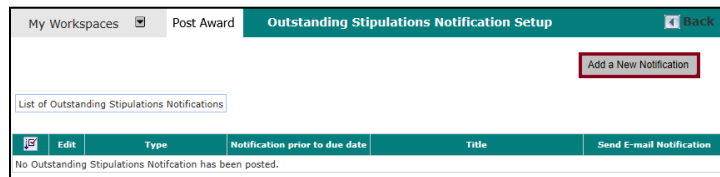
Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Outstanding Stipulations Notification

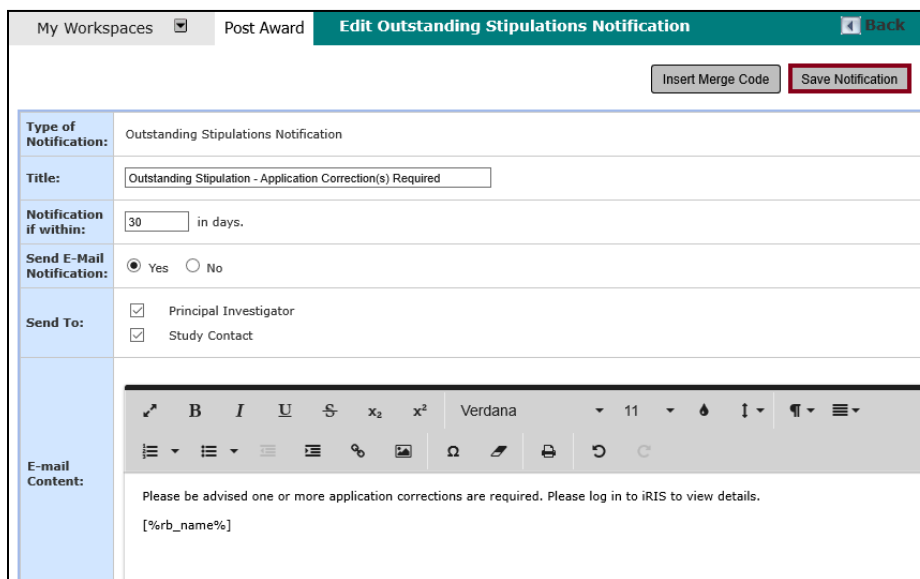
Navigate to [Module] > Review Board Administration > **Outstanding Stipulations Notification** link.



The **Outstanding Stipulations Notification Setup** page opens.



Click the **Add a New Notification** button. The **Edit Outstanding Stipulations Notification** page opens.



Enter the desired subject line of the notification email in the **Title** field.

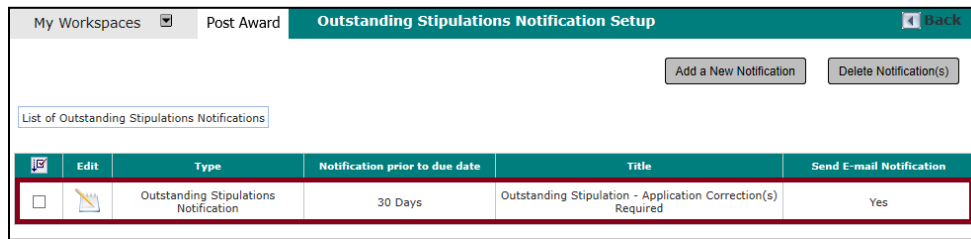
Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

In the **Send To** field, select the checkbox for “Principal Investigator”, “Study Contact” or both to add them to distribution.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the **Outstanding Stipulations Notification Setup** page.

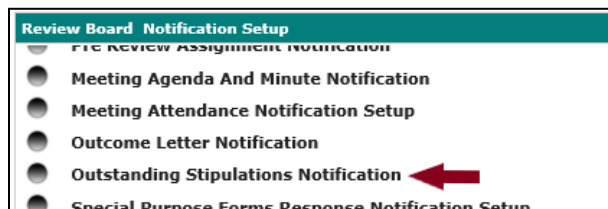


Notice that the **Add a New Notification** button remains, indicating that additional notifications of this type can be created for different types of stipulations.

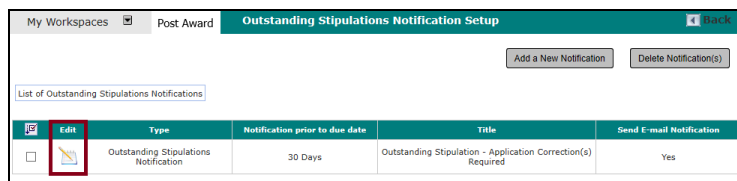
Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised, and a **Delete Notification(s)** button is now available as well.

Edit Outstanding Stipulations Notification

Navigate to [Module] > Review Board Administration > **Outstanding Stipulations Notification** link.



The **Outstanding Stipulations Notification Setup** page opens.



Click the icon in the **Edit** column for the applicable notification. The notification is opened for editing in the **Edit Outstanding Stipulations Notification** page.

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

In the **Send To** field, select the checkbox for “Principal Investigator”, “Study Contact” or both to add them to distribution.

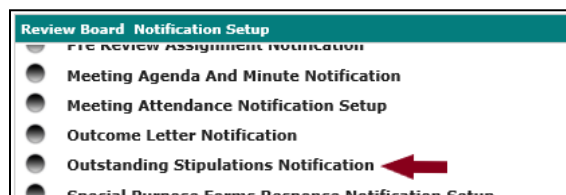
Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the **Outstanding Stipulations Notification Setup** page.

<input type="checkbox"/>	Edit	Type	Notification prior to due date	Title	Send E-mail Notification
<input type="checkbox"/>		Outstanding Stipulations Notification	15 Days	Outstanding Stipulation - Application Correction(s) Required	Yes

Delete Outstanding Stipulations Notification

Navigate to [Module] > Review Board Administration > **Outstanding Stipulations Notification** link.



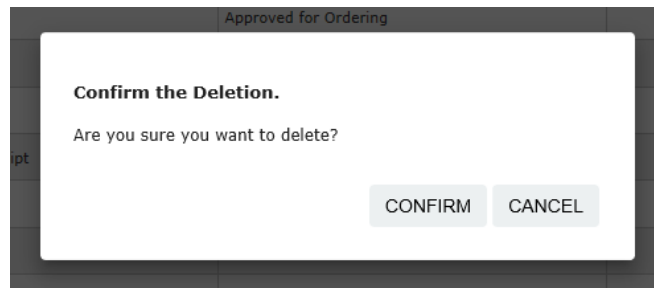
The **Outstanding Stipulations Notification Setup** page opens.



CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

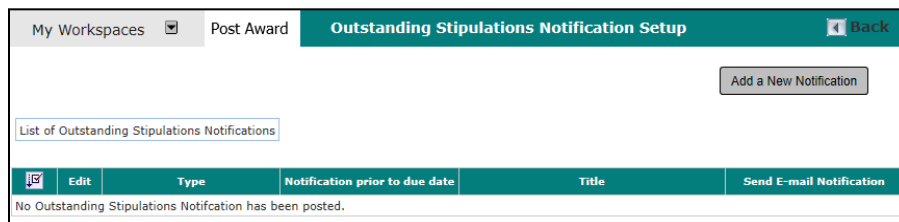
Select the checkbox in the far-left column for the applicable notification and click the **Delete Notification(s)** button.

A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.



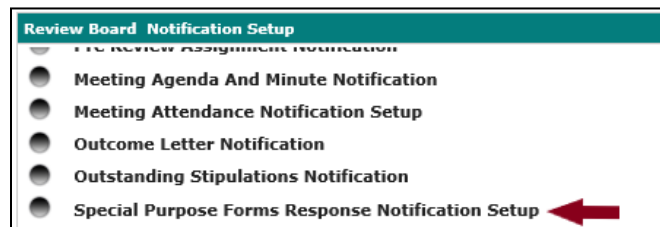
If deleting the notification has left the list on this page empty the **Edit** icon and **Delete Notification(s)** button no longer appear.

Special Purpose Forms Response Notifications

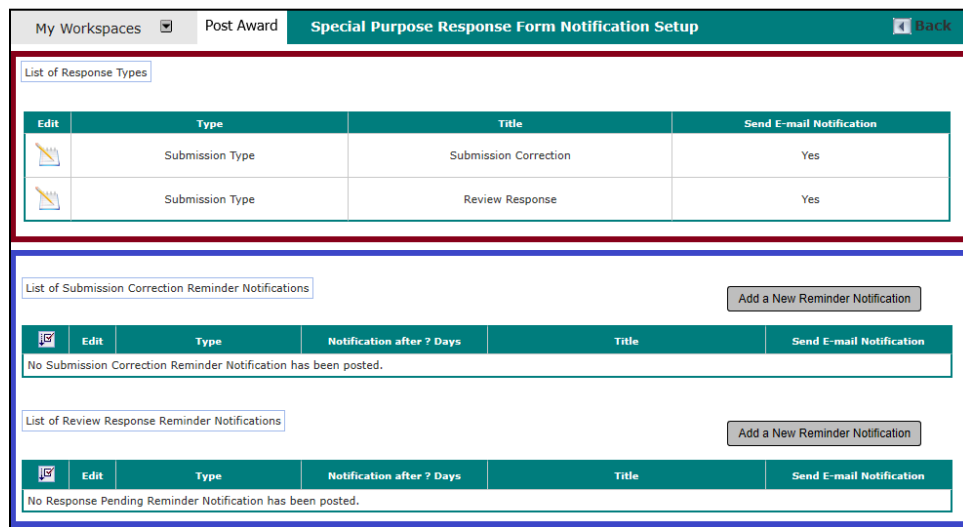
Notifications related to submission corrections and review responses can be configured in the iRIS™ system on the **Special Purpose Response Form Notification Setup** page. When configured, these notifications are automatically sent to applicable project personnel as follows:

- a Submission Correction notification is sent when a request for submission corrections is saved to the system
- a Review Response notification is sent when a board review response request is saved to the system
- a Submission Correction Reminder notification is sent X days before the due date for requested submission corrections, where X is a number specified in the notification configuration form
- a Review Response Reminder notification is sent X days before the due date for a requested review response, where X is a number specified in the notification configuration form

All four of these notification types are configured on the **Special Purpose Response Form Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.



The **Special Purpose Response Form Notification Setup** page is opened.



Submission Correction and Review Response notification types are configured in the upper portion of the page (red box in screenshot above).

Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

The same configuration form, shown below, is used for Submission Correction and Review Response notification types.

The screenshot shows a configuration form with the following fields and content:

- Title:** Submission Correction
- Send E-Mail Notification:** Yes No
- E-mail Content:**

One or more errors have been found in your submission. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.

[%rb_name%]

The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

The same configuration form, shown below, is used for both Submission Correction Reminder and Response Pending Reminder notification types.

The screenshot shows a configuration form with the following fields and content:

- Type of Notification:** Special Purpose Form Correction Reminder Notification
- Title:** [Empty text box]
- Notification if within:** 30 in days.
- Send E-Mail Notification:** Yes No
- E-mail Content:** [Empty text editor area]

The **Title** field is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

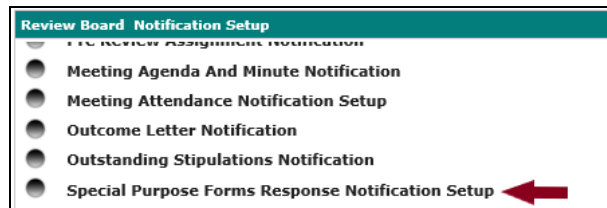
Boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Submission Response Notification Setup

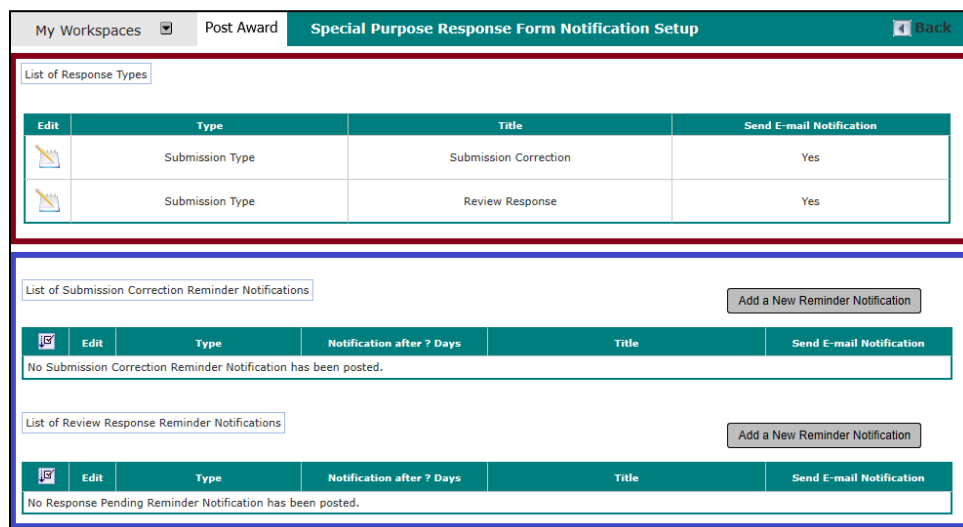
Two types of submission response notifications are configured in the iRIS™ system on the **Special Purpose Response Form Notification Setup** page:

- a Submission Correction notification is sent when a request for submission corrections is saved to the system
- a Review Response notification is sent when a board review response request is saved to the system

Both notification types are configured on the **Special Purpose Response Form Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.



The **Special Purpose Response Form Notification Setup** page is opened.



Submission response notifications are configured in the upper portion of the page (red box in screenshot above).

Notice that while an **Edit** icon is provided for these notifications in the far-left column, there are no add or delete buttons. This means that only one version of each notification type can be configured, and that the configured notifications cannot be deleted.

Click the **Edit** icon for the applicable notification type.

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Correction	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications

[Add a New Reminder Notification](#)

Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.				

List of Review Response Reminder Notifications

[Add a New Reminder Notification](#)

Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.				

The selected notification type is opened in the **Edit Submission Notice** page for revision. The same configuration form, shown below, is used for both types.

[Insert Merge Code](#) [Save Notification](#)

Title:

Send E-Mail Notification: Yes No

E-mail Content:

One or more errors have been found in your submission. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.

[%rb_name%]

Make desired changes in the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected notification type is revised on the **Special Purpose Response Form Notification Setup** page.

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Corrections Required	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications

[Add a New Reminder Notification](#)

	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.					

List of Review Response Reminder Notifications

[Add a New Reminder Notification](#)

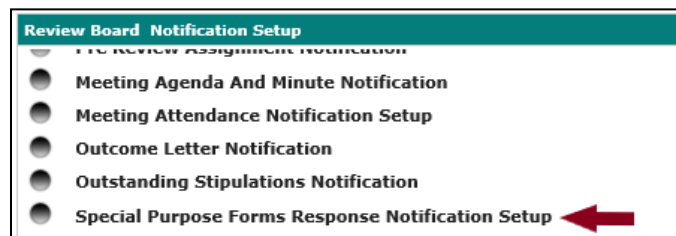
	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Submission Response Reminder Notification Setup

Two types of submission response notifications are configured in the iRIS™ system on the **Special Purpose Response Form Notification Setup** page:

- a Submission Correction notification is sent when a request for submission corrections is saved to the system
- a Review Response notification is sent when a board review response request is saved to the system

Both notification types are configured on the **Special Purpose Response Form Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.



The **Special Purpose Response Form Notification Setup** page is opened.

Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

The same configuration form, shown below, is used for addition or revision of both reminder types.

The **Title** field is used as the subject line in the notification e-mail.

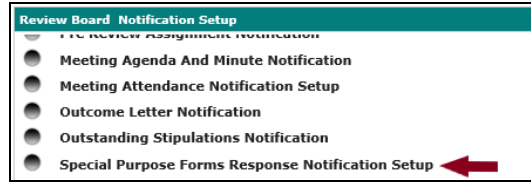
The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

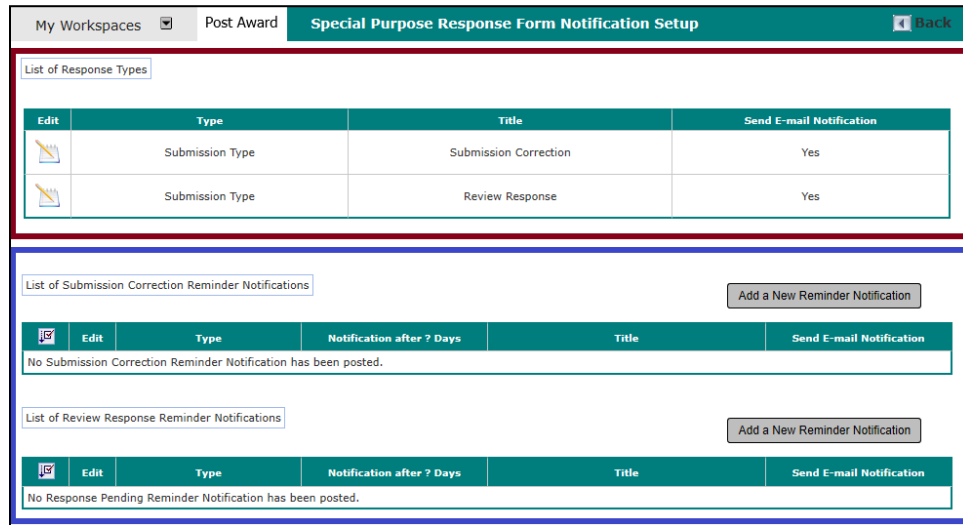
Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Submission Response Reminder Notification

Navigate to [Module] > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.

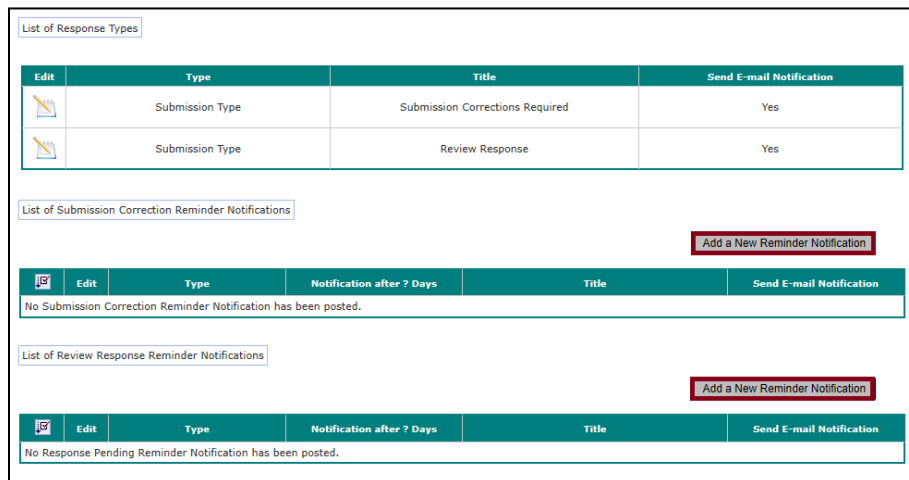


The **Special Purpose Response Form Notification Setup** page is opened.



Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

Click the **Add a New Reminder Notification** button for the applicable notification type.



The **Edit Submission Notice** page opens for configuration of the reminder. The same configuration form, shown below, is used for both reminder notification types.

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected reminder type is added on the **Special Purpose Response Form Notification Setup** page.

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Corrections Required	Yes
	Submission Type	Review Response	Yes

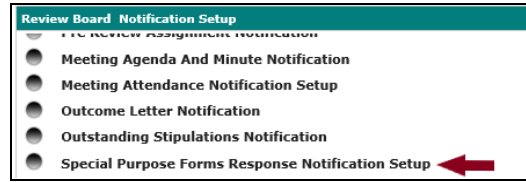
IS	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
<input type="checkbox"/>		Special Purpose Form Correction Reminder Notification	30 Days	Submission Correction Reminder	Yes

Notice that an **Edit** icon is available for the reminder, and now that at least one reminder of this type is configured a **Delete Reminder Notification(s)** button is added for the type.

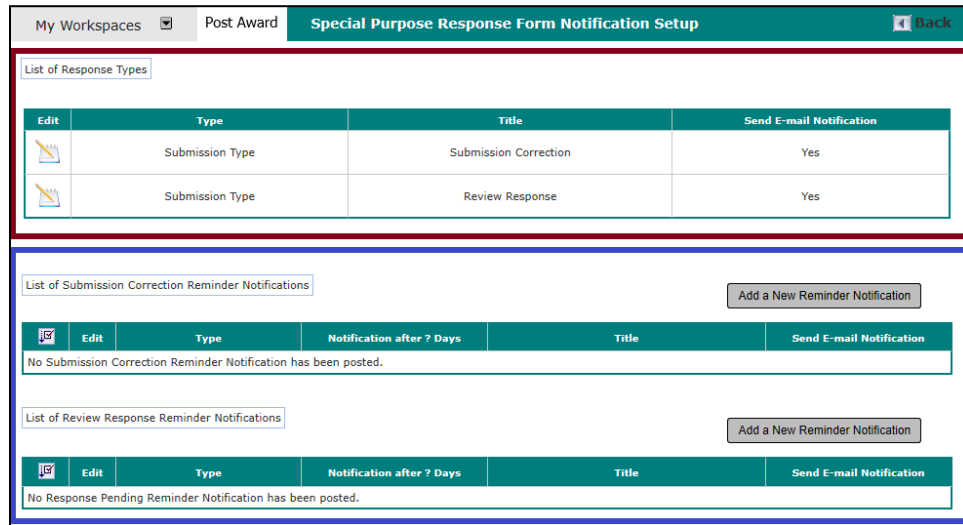
The **Add a New Reminder Notification** button remains, indicating that multiple versions of this reminder type can be configured.

Edit Submission Response Reminder Notification

Navigate to [Module] > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.

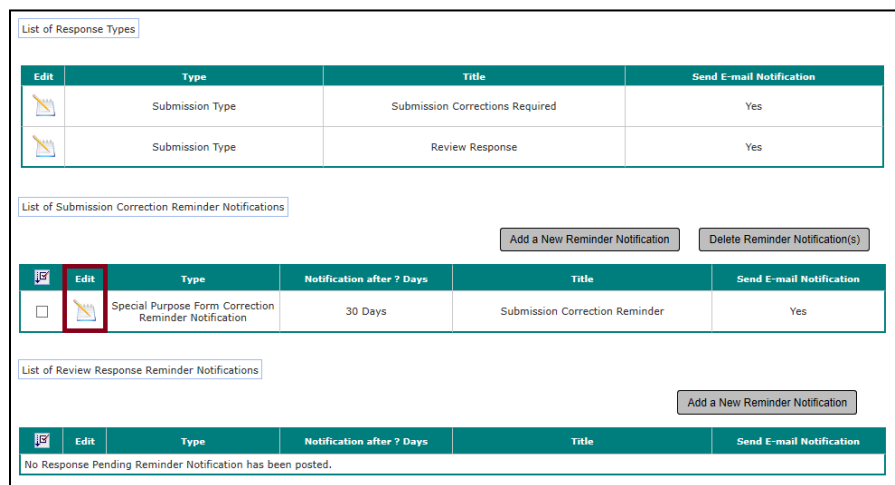


The **Special Purpose Response Form Notification Setup** page is opened.



Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

Click the **Edit** icon for the applicable notification type.



The notification is opened for editing in the **Edit Submission Notice** page. The same configuration form, shown below, is used for both reminder notification types.

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected reminder type is revised on the **Special Purpose Response Form Notification Setup** page.

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Corrections Required	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications

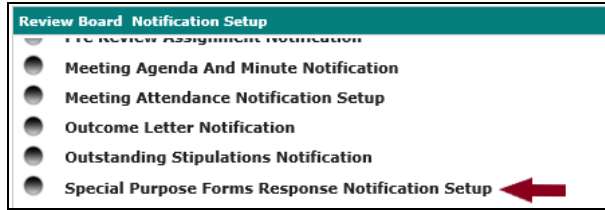
	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
<input type="checkbox"/>		Special Purpose Form Correction Reminder Notification	15 Days	Submission Correction Reminder	Yes

List of Review Response Reminder Notifications

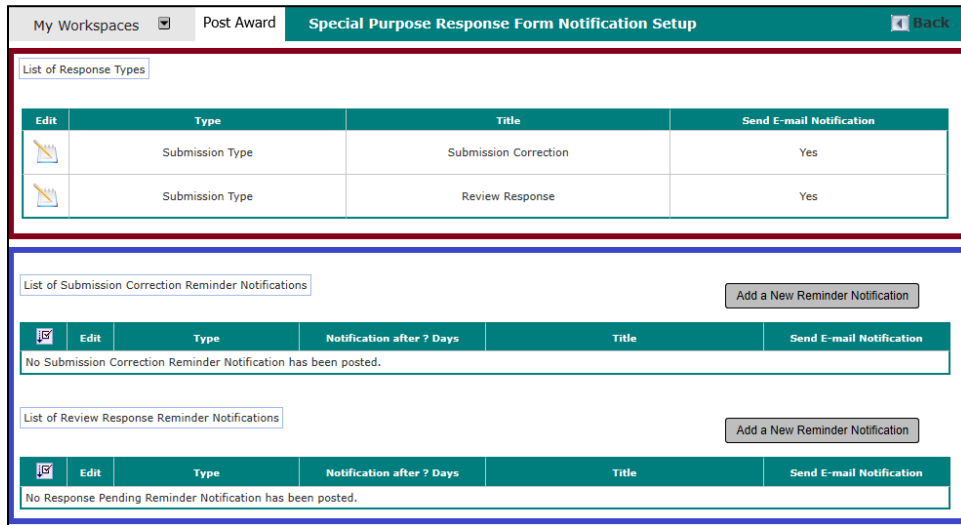
	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Delete Submission Response Reminder Notification

Navigate to [Module] > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.



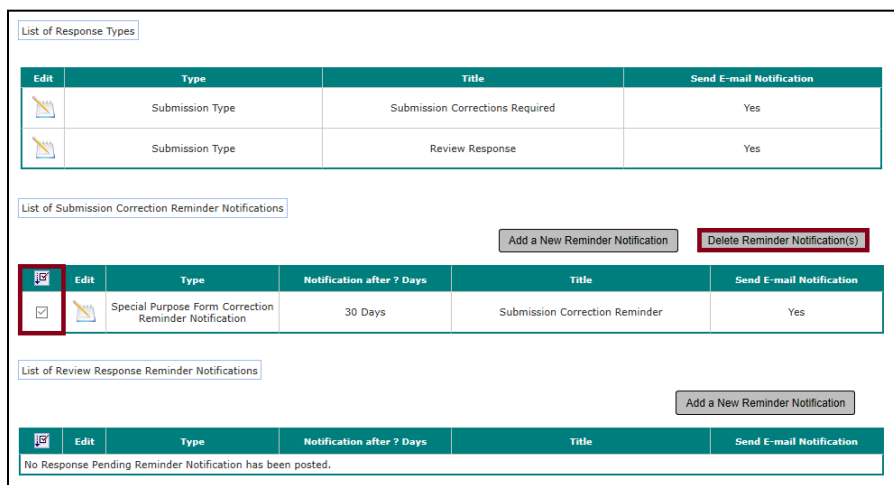
The **Special Purpose Response Form Notification Setup** page is opened.



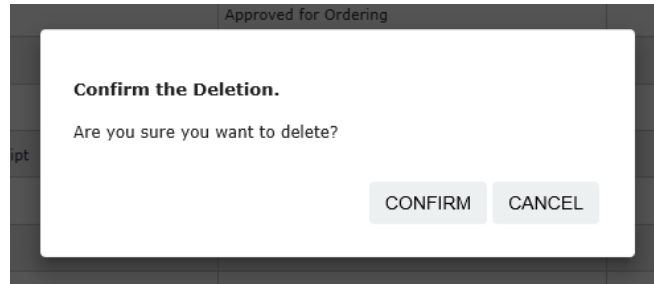
Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox(es) in the far-left column for the applicable reminder type(s) and click the **Delete Reminder Notification(s)** button.



A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

List of Response Types				
Edit	Type	Title	Send E-mail Notification	
	Submission Type	Submission Corrections Required	Yes	
	Submission Type	Review Response	Yes	

List of Submission Correction Reminder Notifications					
	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.					

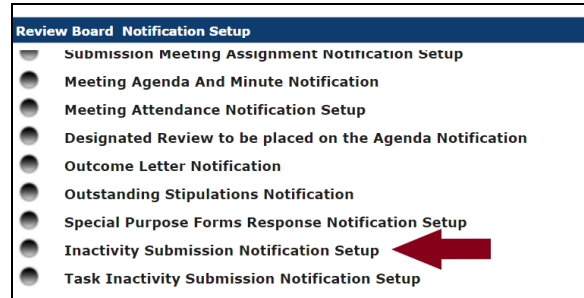
List of Review Response Reminder Notifications					
	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Notice that the **Edit** icon and **Delete Reminder Notification(s)** button no longer appear.

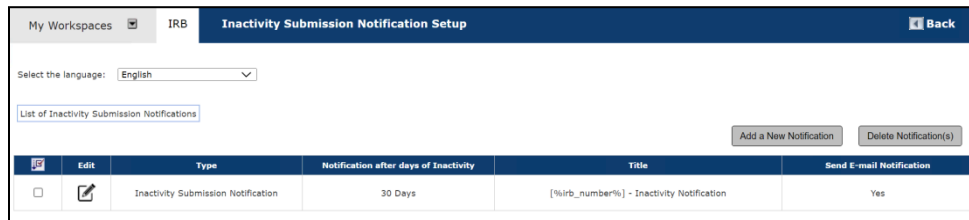
Inactivity Submission Notifications

The **Inactivity Submission Notification** is used to alert personnel that no activity has occurred on a given submission for a specified period of time.

This type of notification is configured on the **Inactivity Submission Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Inactivity Submission Notification Setup** link.

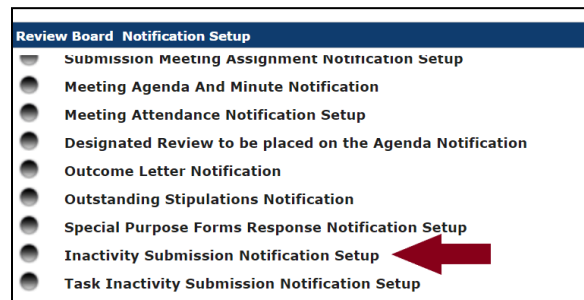


The **Inactivity Submission Notification Setup** page opens.

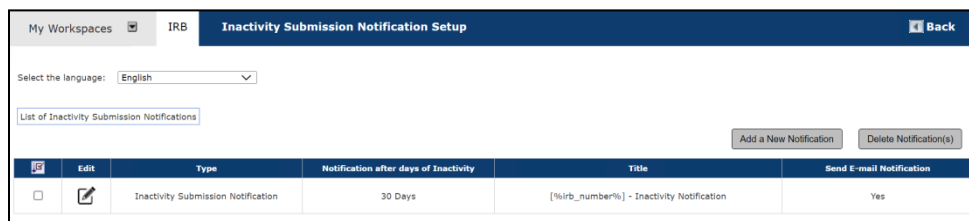


Add Inactivity Submission Notification

Navigate to [Module] > Review Board Administration > **Inactivity Submission Notification Setup** link.



The **Inactivity Submission Notification Setup** page opens.



Click the **Add a New Notification** button to open the **Edit Inactivity Submission Notification** page.

The screenshot shows the 'Edit Inactivity Submission Notification' form. The form is titled 'Edit Inactivity Submission Notification' and is part of the 'IRB' workspace. It contains several fields: 'Type of Notification' (Inactivity Submission Notification), 'Title' (with an 'Include RB Number' button), 'Notification if past' (0 days of inactivity), 'Send E-mail Notification' (Yes selected), 'Send To' (Principal Investigator and Study Contact checkboxes), and 'Additional Recipients' (Add button). The 'E-mail Content' field is a rich text editor with a toolbar.

Enter the desired subject line of the notification email in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Enter the number of days of inactivity after which the notification is to be sent in the **Notification if past** field.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

The **Additional Recipients** field allows for the addition of other iRIS™ users to the distribution list for this notification. Click the **Add** button to select specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		JHarp@msc.edu

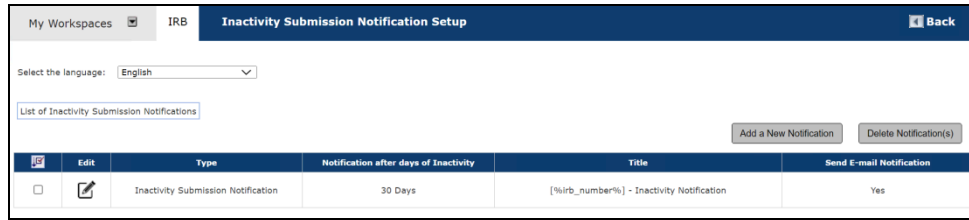
Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added to the **Additional Recipients** field and a **Delete** button populates next to the **Add** button.

If a user is added in error, select the checkbox to the left of that user’s name and click the **Delete** button to remove the user from distribution.

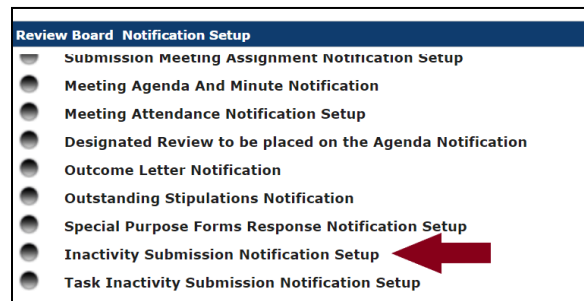
Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is configured on the notification setup page.

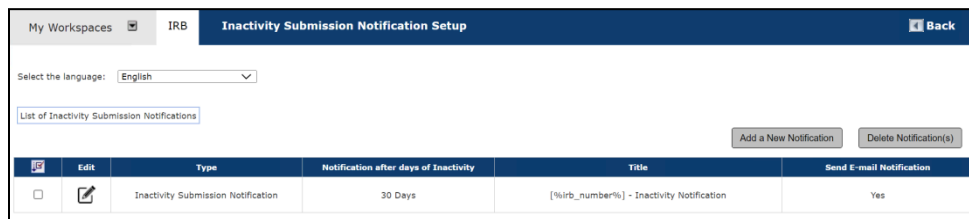


Edit Inactivity Submission Notification

Navigate to [Module] > Review Board Administration > **Inactivity Submission Notification Setup** link.



The **Inactivity Submission Notification Setup** page opens.



Click the icon in the **Edit** column to open the applicable notification in the **Edit Inactivity Submission Notification** page.

My Workspaces ▾ IRB **Edit Inactivity Submission Notification** Back

Insert Merge Code Save Notification

Type of Notification: Inactivity Submission Notification

Title: [%rb_number%] - Inactivity Notification Include RB Number

Notification if past: 30 days of inactivity.

Send E-mail Notification: Yes No

***Send To:** Principal Investigator Study Contact

Additional Recipients: Add

E-mail Content:

No activity has been recorded in the system for the above-referenced submission during the past thirty (30) days. Please login and update submission status [%rb_name%]

Make desired changes to the subject line of the notification email in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Enter the number of days of inactivity after which the notification is to be sent in the **Notification if past** field.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

The **Additional Recipients** field allows for the addition of other iRIS™ users to the distribution list for this notification. Click the **Add** button to select specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		JHarp@msc.edu

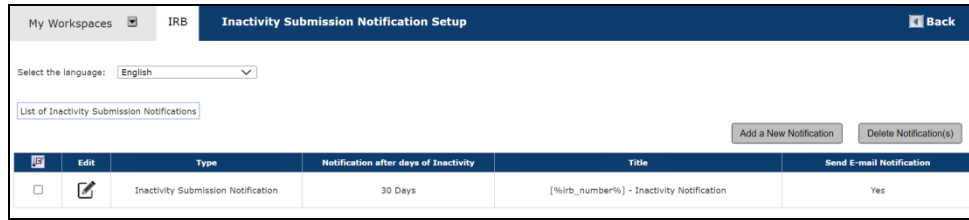
Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added to the **Additional Recipients** field and a **Delete** button populates next to the **Add** button.

If a user is added in error, select the checkbox to the left of that user’s name and click the **Delete** button to remove the user from distribution.

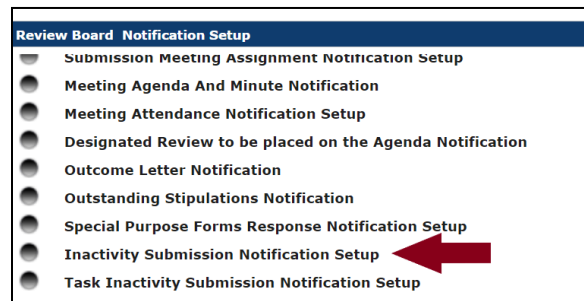
Revised boilerplate text and Merge Codes as desired in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is revised on the notification setup page.

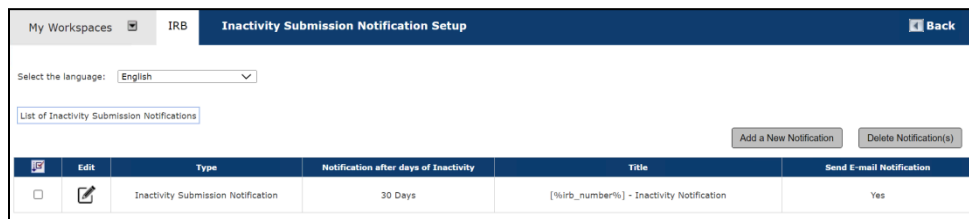


Delete Inactivity Submission Notification

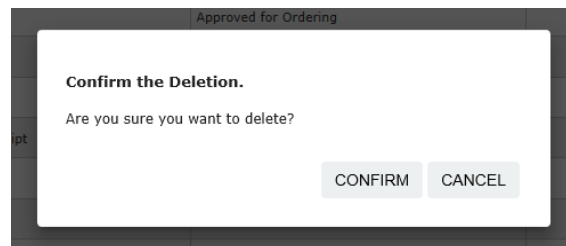
Navigate to [Module] > Review Board Administration > **Inactivity Submission Notification Setup** link.



The **Inactivity Submission Notification Setup** page opens.



Click to select the checkbox(es) for the notification(s) to be deleted in the far left column and click the **Delete Notification(s)** button. A confirmation popup window displays.



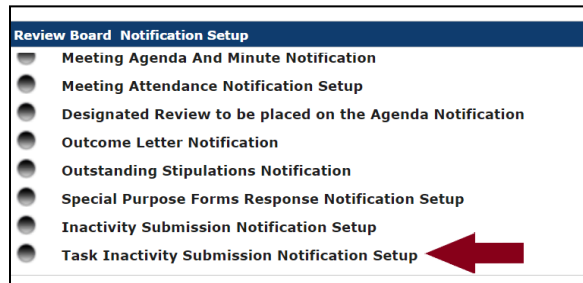
Click **CANCEL** to close the popup without deleting the notification.

Click **CONFIRM** to delete the notification and close the popup. The selected notification type is deleted on the notification setup page.

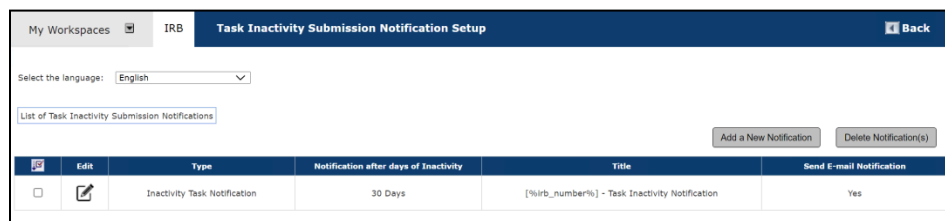
Task Inactivity Submission Notifications

The **Task Inactivity Submission Notification** is used to alert personnel that no activity has occurred on a given task for a specified period of time. Please note that these notifications are for board specific tasks.

This type of notification is configured on the **Task Inactivity Submission Notification Setup** page. To access the page, navigate to [Module] > Review Board Administration > **Task Inactivity Submission Notification Setup** link.

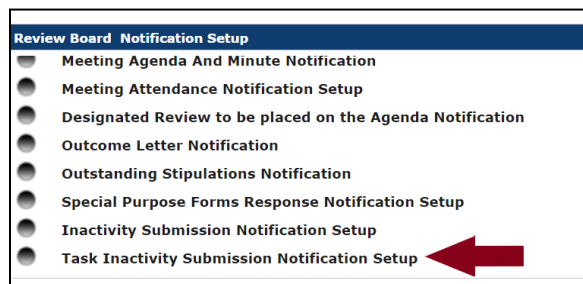


The **Task Inactivity Submission Notification Setup** page opens.

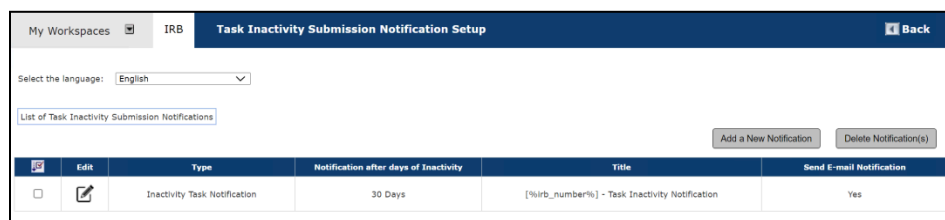


Add Task Inactivity Submission Notification

Navigate to [Module] > Review Board Administration > **Task Inactivity Submission Notification Setup** link.



The **Task Inactivity Submission Notification Setup** page opens.



Click the **Add a New Notification** button to open the **Edit Task Inactivity Submission Notification** page.

The screenshot shows the 'Edit Task Inactivity Submission Notification' form. At the top, there is a header with 'My Workspaces', 'IRB', and the title 'Edit Task Inactivity Submission Notification' with a 'Back' button. Below the header are two buttons: 'Insert Merge Code' and 'Save Notification'. The form fields are as follows:

- Type of Notification:** Inactivity Task Notification
- Title:** A text input field with an 'Include RB Number' button to its right.
- Notification if past:** A text input field containing '0' followed by 'days of inactivity'.
- Send E-mail Notification:** Radio buttons for 'Yes' (selected) and 'No'.
- Send To:** Checkboxes for 'Principal Investigator' and 'Study Contact'.
- Task List :** A dropdown menu currently showing '--none--'.
- Additional Recipients:** An 'Add' button.
- E-mail Content:** A rich text editor with a toolbar containing various formatting options like bold, italic, underline, and font size.

Enter the desired subject line of the notification email in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Enter the number of days of inactivity after which the notification is to be sent in the **Notification if past** field.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

Click in the **Task List** field to open a drop down picklist of tasks. Click to select the task for which this inactivity notification is being sent.

The **Additional Recipients** field allows for the addition of other iRIS™ users to the distribution list for this notification. Click the **Add** button to select specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		JHarp@msc.edu

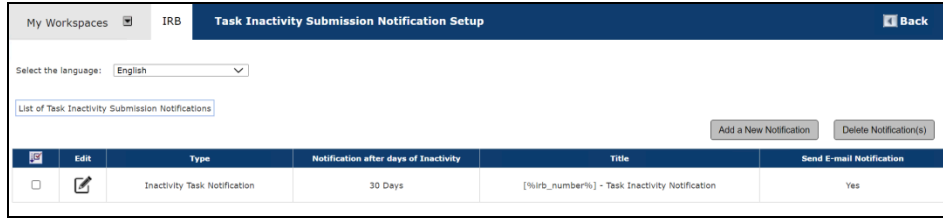
Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added to the **Additional Recipients** field and a **Delete** button populates next to the **Add** button.

If a user is added in error, select the checkbox to the left of that user’s name and click the **Delete** button to remove the user from distribution.

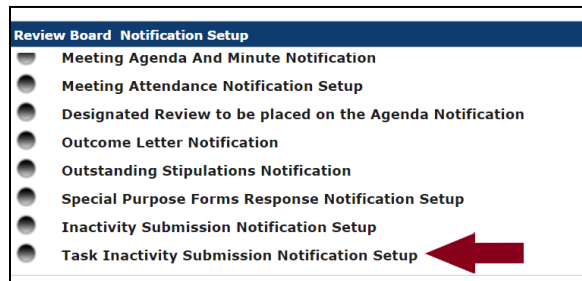
Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is configured on the notification setup page.

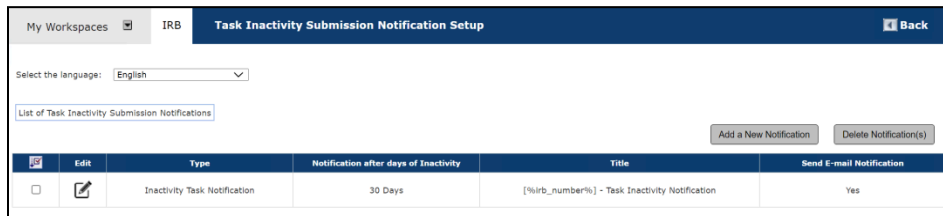


Edit Task Inactivity Submission Notification

Navigate to [Module] > Review Board Administration > **Task Inactivity Submission Notification Setup** link.



The **Task Inactivity Submission Notification Setup** page opens.



Click the icon in the **Edit** column to open the applicable notification in the **Edit Task Inactivity Submission Notification** page.

The screenshot shows the 'Edit Task Inactivity Submission Notification' form. The form is titled 'Edit Task Inactivity Submission Notification' and includes a 'Back' button. The form contains several fields: 'Type of Notification' (Inactivity Task Notification), 'Title' (with a placeholder '[%rb_number%] - Task Inactivity Notification' and an 'Include RB Number' button), 'Notification if past' (30 days of inactivity), 'Send E-mail Notification' (Yes/No radio buttons), 'Send To' (checkboxes for Principal Investigator and Study Contact), 'Task List' (Submission Routing Signoff dropdown), and 'Additional Recipients' (Add button). Below these fields is a rich text editor for the 'E-mail Content' field, showing a sample notification message: 'No submission routing signoff activity from you has been recorded in the system in the past thirty (30) days. Please login to the system and complete outstanding signoff tasks. [%rb_name%]'.

Make desired changes to the subject line of the notification email in the **Title** field. To include the RB number in the **Title**, place the cursor in the **Title** field where the number should appear and click the **Include RB Number** button.

Enter the number of days of inactivity after which the notification is to be sent in the **Notification if past** field.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification. Click to select the applicable checkboxes, indicating that those personnel will receive the notification.

Click in the **Task List** field to open a drop down picklist of tasks. Click to select the task for which this inactivity notification is being sent.

The **Additional Recipients** field allows for the addition of other iRIS™ users to the distribution list for this notification. Click the **Add** button to select specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		JHarp@msc.edu

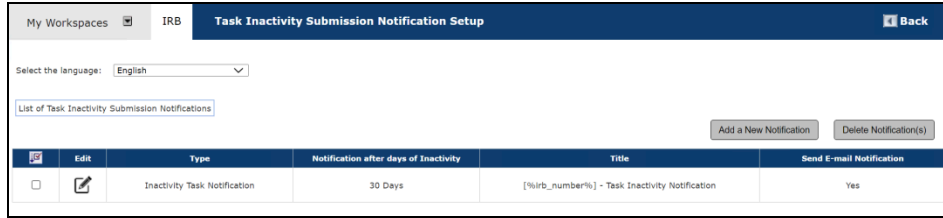
Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added to the **Additional Recipients** field and a **Delete** button populates next to the **Add** button.

If a user is added in error, select the checkbox to the left of that user’s name and click the **Delete** button to remove the user from distribution.

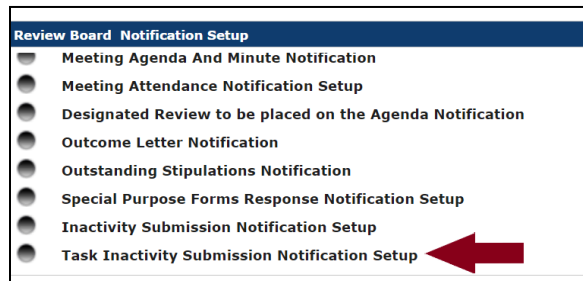
Make desired changes to boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the page. The notification is revised on the notification setup page.

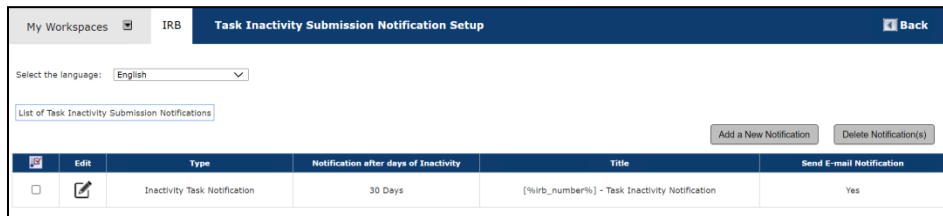


Delete Task Inactivity Submission Notification

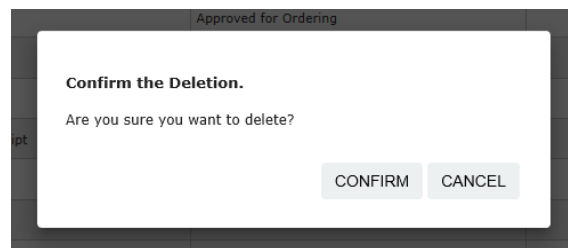
Navigate to [Module] > Review Board Administration > **Task Inactivity Submission Notification Setup** link.



The **Task Inactivity Submission Notification Setup** page opens.



Click to select the checkbox(es) for the notification(s) to be deleted in the far-left column and click the **Delete Notification(s)** button. A confirmation popup window displays.



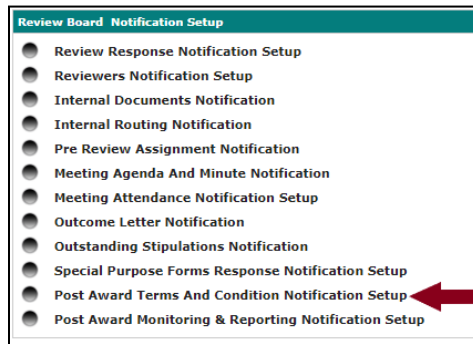
Click **CANCEL** to close the popup without deleting the notification.

Click **CONFIRM** to delete the notification and close the popup. The selected notification type is deleted on the notification setup page.

Post Award Terms And Condition Notification Setup

When configured, Terms and Conditions (T&C) notifications are automatically sent to applicable project personnel to inform them they have been selected by the board to receive and/or review a T&C document. This type of notification is configured on the **Setup Post Award Terms & Conditions Notification** page.

To access the page, navigate to Post Award Management > Review Board Administration > **Post Award Terms And Condition Notification Setup** link.



The **Award Terms & Conditions Signoff Notification** page is opened, as shown below.

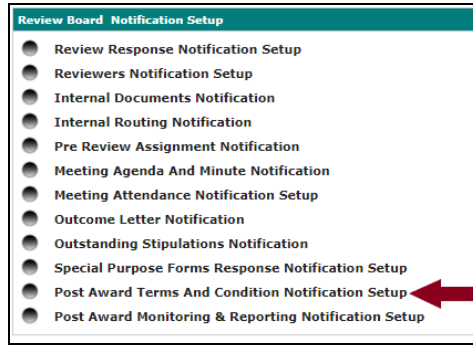
My Workspaces		Post Award			Award Terms & Conditions Signoff Notifications		Back
Edit	Notification Type	Notification prior to due date	Notification	Notification Action			
	Post Award Terms and Condition Signoff	Post Award Terms and Conditions Ready for Review and Sign-off grants/11021	Yes	Delete Notification			
Add a New Notification							
Delete	Edit	Notification Type	Notification prior to due date	Notification	Notification		
		Post Award Terms and Condition Notification for Signoff Reminder	Notify every 5 Days	Reminder for Terms and Conditions grants 11021	Yes		
		Post Award Terms and Condition Notification for Signoff Reminder	Notify every 1 Days	Reminder for Terms and Conditions	Yes		

The initial notification is configured in the upper part of the page. Notice that there is only one configurable record here. When the notification is unconfigured an **Add Notification** button is provided in the **Notification Action** column. When this notification is configured, as in the screenshot above, the Add button is replaced with a **Delete Notification** button.

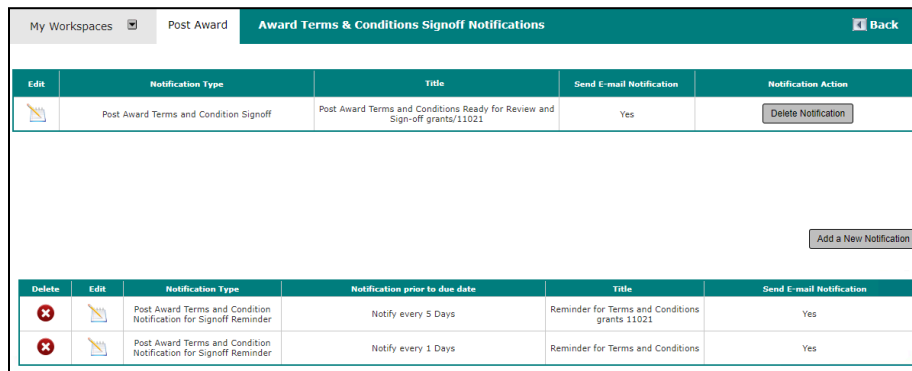
T&C reminder notifications are configured in the lower portion of the page.

Add Post Award Terms And Condition Notification

Navigate to Post Award Management > Review Board Administration > **Post Award Terms And Condition Notification Setup** link.



The **Award Terms & Conditions Signoff Notification** page is opened, as shown below.



The initial notification is configured in the upper part of the page. Notice that there is only one configurable record here. When the notification is unconfigured an **Add Notification** button is provided in the **Notification Action** column. When this notification is configured, as in the screenshot above, the Add button is replaced with a **Delete Notification** button.

T&C reminder notifications are configured in the lower portion of the page. Click the **Add a New Notification** button for the applicable notification type.

The **Setup Post Award Terms & Conditions Notification** page opens.

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

As shown below, the reminder notification type also includes a **Notification if Within** field, for entry of the number of days in advance of the due date the reminder is to be sent.

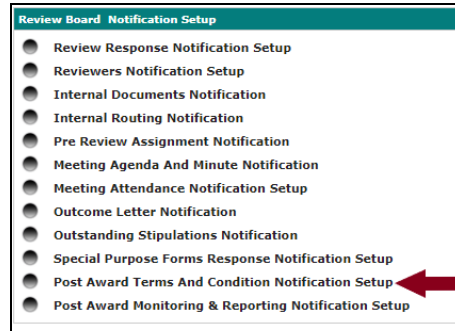
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected reminder type is revised.

Edit Post Award Terms And Condition Notification

Navigate to Post Award Management > Review Board Administration > **Post Award Terms And Condition Notification Setup** link.



The Setup Post Award Terms & Conditions Notification page opens.

My Workspaces		Post Award		Award Terms & Conditions Signoff Notifications		Back
Edit	Notification Type	Title	Send E-mail Notification	Notification Action		
	Post Award Terms and Condition Signoff	Post Award Terms and Conditions Ready for Review and Sign-off grants/11021	Yes	Delete Notification		
Add a New Notification						
Delete	Edit	Notification Type	Notification prior to due date	Title	Send E-mail Notification	
		Post Award Terms and Condition Notification for Signoff Reminder	Notify every 5 Days	Reminder for Terms and Conditions grants 11021	Yes	
		Post Award Terms and Condition Notification for Signoff Reminder	Notify every 1 Days	Reminder for Terms and Conditions	Yes	

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

As shown below, the reminder notification type also includes a **Notification if Within** field, for entry of the number of days in advance of the due date the reminder is to be sent.

My Workspaces		Post Award		Award Terms & Conditions Signoff Notifications		Back
Insert Merge Code Save Notification						
Type of Notification:	Post Award Terms and Condition Notification for Signoff Reminder					
Title:	<input type="text" value="Reminder for Terms and Conditions grants 11021"/>					
Notification if within:	<input type="text" value="5"/> Days					
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No					

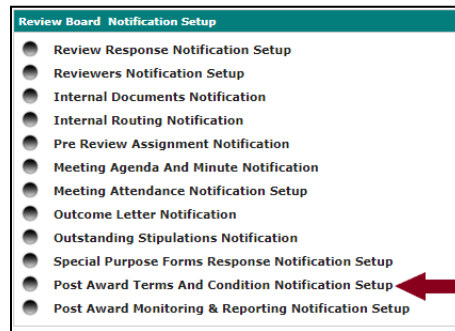
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected reminder type is revised.

Delete Post Award Terms And Condition Notification

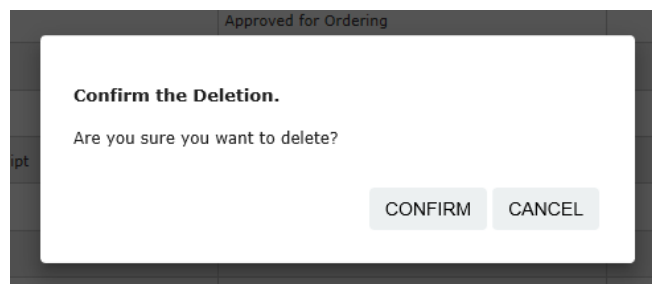
Navigate to Post Award Management > Review Board Administration > **Post Award Terms And Condition Notification Setup** link.



The **Setup Post Award Terms & Conditions Notification** page opens.

My Workspaces		Post Award	Award Terms & Conditions Signoff Notifications			Back
Edit	Notification Type	Title	Send E-mail Notification	Notification Action		
	Post Award Terms and Condition Signoff	Post Award Terms and Conditions Ready for Review and Sign-off grants/11021	Yes	Delete Notification		
Add a New Notification						
Delete	Edit	Notification Type	Notification prior to due date	Title	Send E-mail Notification	
		Post Award Terms and Condition Notification for Signoff Reminder	Notify every 5 Days	Reminder for Terms and Conditions grants 11021	Yes	
		Post Award Terms and Condition Notification for Signoff Reminder	Notify every 1 Days	Reminder for Terms and Conditions	Yes	

Click the icon in the **Delete** column for the applicable notification. A confirmation popup window displays.



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

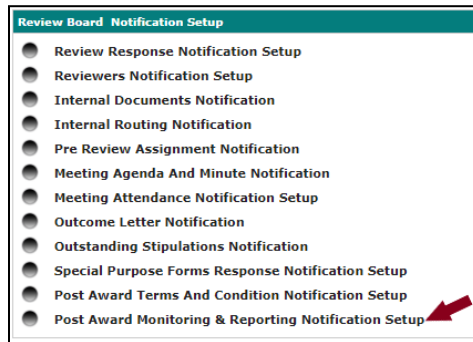
Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.

Post Award Monitoring & Reporting Notification Setup

When configured, Post Award monitoring and reporting notifications are automatically sent to applicable project personnel.

This type of notification is configured on the **Setup Post Award Monitoring & Reporting Notification** page.

To access the page, navigate to [Module] > Review Board Administration > **Post Award Monitoring & Reporting Notification Setup** link.



The **Setup Post Award Monitoring & Reporting Notification** page opens.

My Workspaces Post Award **Post Award Monitoring & Reporting Notifications Setup** Back

List of Post Award Monitoring & Reporting Notifications

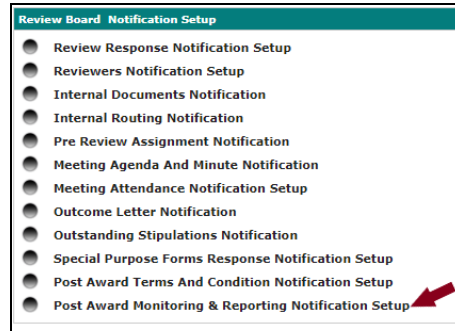
Add a New Notification Delete Reminder Notification(s)

<input type="checkbox"/>	Edit	Notification Type	Title	Notification prior to due date	Send E-mail Notification
<input type="checkbox"/>		Post Award Monitoring & Reporting Reminder	Post Award Monitoring & Reporting 30 days Reminder	20 Days	Yes
<input type="checkbox"/>		Post Award Monitoring & Reporting Reminder	Post Award Monitoring & Reporting Reminder	3 Days	Yes
<input type="checkbox"/>		Post Award Monitoring & Reporting Reminder	You have a report due in 1 Day for [%proposal_number%],	1 Days	Yes

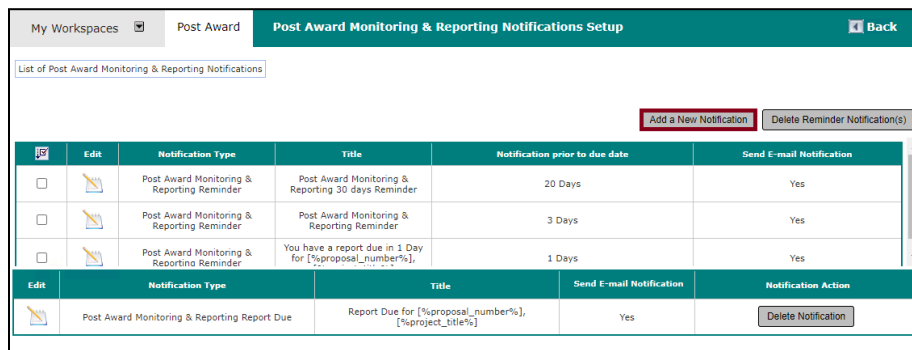
Edit	Notification Type	Title	Send E-mail Notification	Notification Action
	Post Award Monitoring & Reporting Report Due	Report Due for [%proposal_number%], [%project_title%]	Yes	<input type="button" value="Delete Notification"/>

Add Post Award Monitoring & Reporting Notification

Navigate to Post Award Management > Review Board Administration > **Post Award Monitoring & Reporting Notification Setup** link.



The Setup Post Award Monitoring & Reporting Notifications Setup page opens, as shown below.



The initial notification is configured in the lower part of the page. Notice that there is only one configurable record here. When the notification is unconfigured an **Add Notification** button is provided in the **Notification Action** column. When this notification is configured, as in the screenshot above, the Add button is replaced with a **Delete Notification** button.

Reporting and Monitoring reminder notifications are configured in the upper portion of the page. Click the **Add a New Notification** button for the applicable notification type.

A configuration panel opens.

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

As shown below, the reminder notification type also includes a **Notification if Within** field, for entry of the number of days in advance of the due date the reminder is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

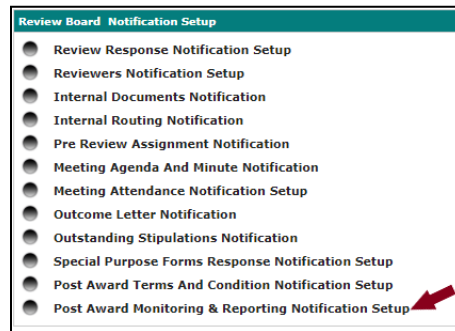
Click to select the applicable **Send To:** checkboxes to specify which roles receive the notification. Click the **Add Role** button to add roles. To delete a role from the list, click to select the applicable role checkbox and click the **Delete Role** button.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

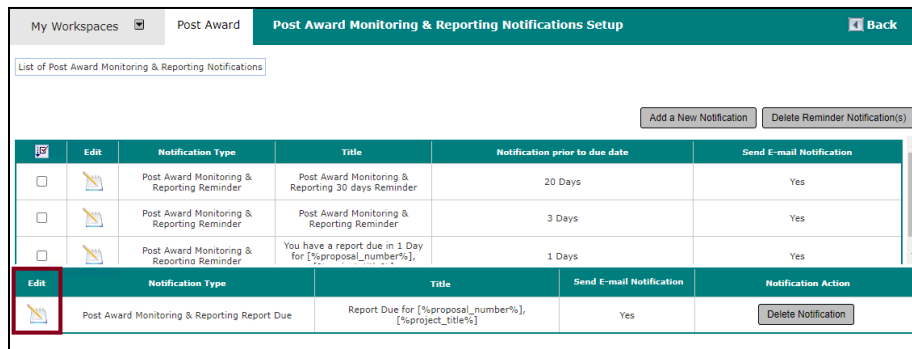
Click the **Save Notification** button. The selected reminder type is configured.

Edit Post Award Monitoring & Reporting Notification

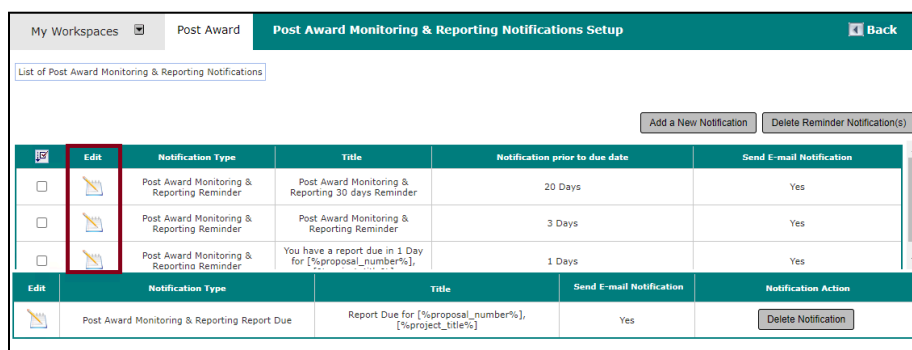
Navigate to Post Award Management > Review Board Administration > **Post Award Monitoring & Reporting Notification Setup** link.



The **Setup Post Award Monitoring & Reporting Notifications Setup** page opens, as shown below.



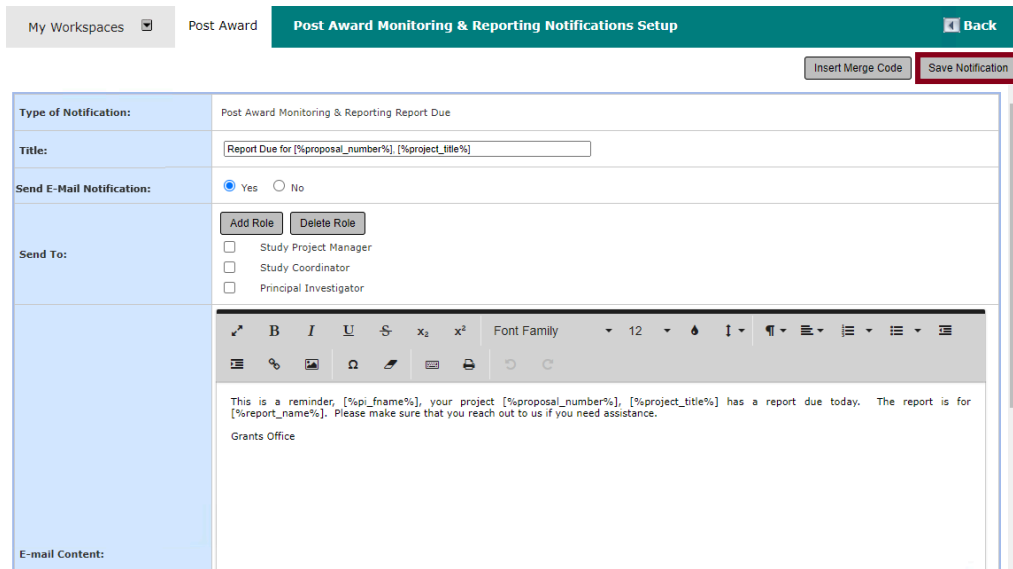
The initial notification is configured in the lower part of the page. Notice that there is only one configurable record here. When the notification is unconfigured an **Add Notification** button is provided in the **Notification Action** column. When this notification is configured, as in the screenshot above, the Add button is replaced with a **Delete Notification** button.



Reporting and Monitoring reminder notifications are configured in the upper portion of the page.

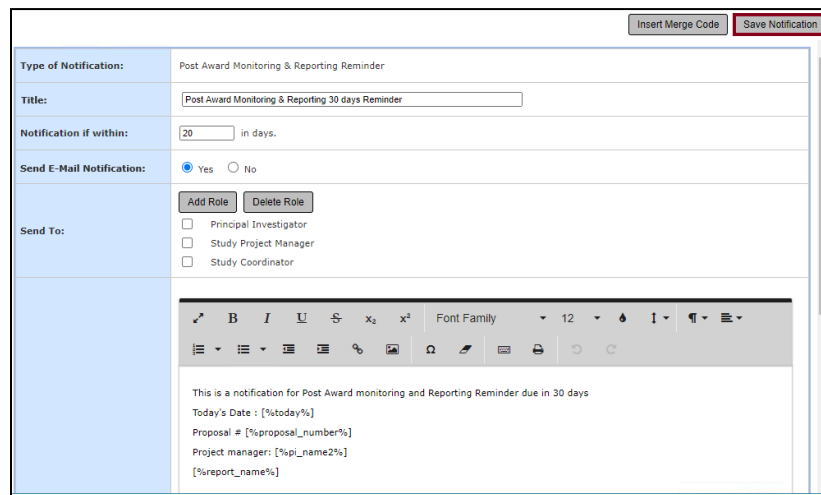
Click the icon in the **Edit** column for the applicable notification type.

The selected notification is opened in a configuration panel.



Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

As shown below, the reminder notification type also includes a **Notification if Within** field, for entry of the number of days in advance of the due date the reminder is to be sent.



If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

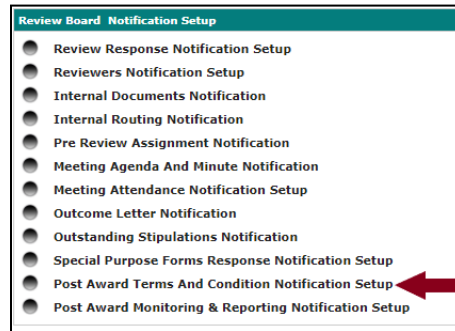
Click to select the applicable **Send To:** checkboxes to specify which roles receive the notification. Click the **Add Role** button to add roles. To delete a role from the list, click to select the applicable role checkbox and click the **Delete Role** button.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

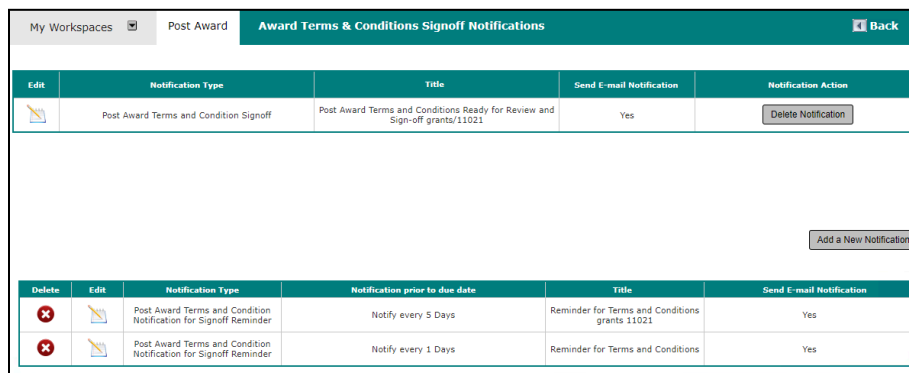
Click the **Save Notification** button. The selected reminder type is revised.

Delete Post Award Monitoring & Reporting Notification

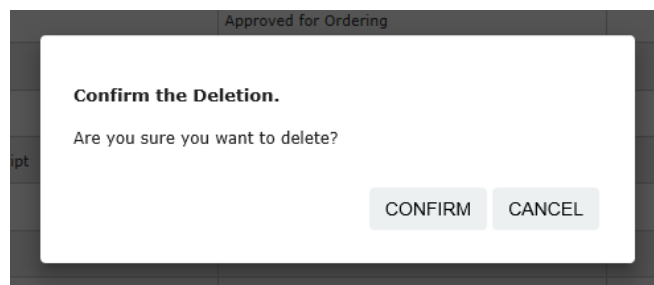
Navigate to Post Award Management > Review Board Administration > **Post Award Terms And Condition Notification Setup** link.



The **Setup Post Award Terms & Conditions Notification** page opens.



Click the icon in the **Delete** column for the applicable notification. A confirmation popup window displays.



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

Click **CONFIRM** to delete the record and close the popup. The selected notification type is now unconfigured on the notification setup page.