



CONFLICT OF INTEREST

Review Board Administration

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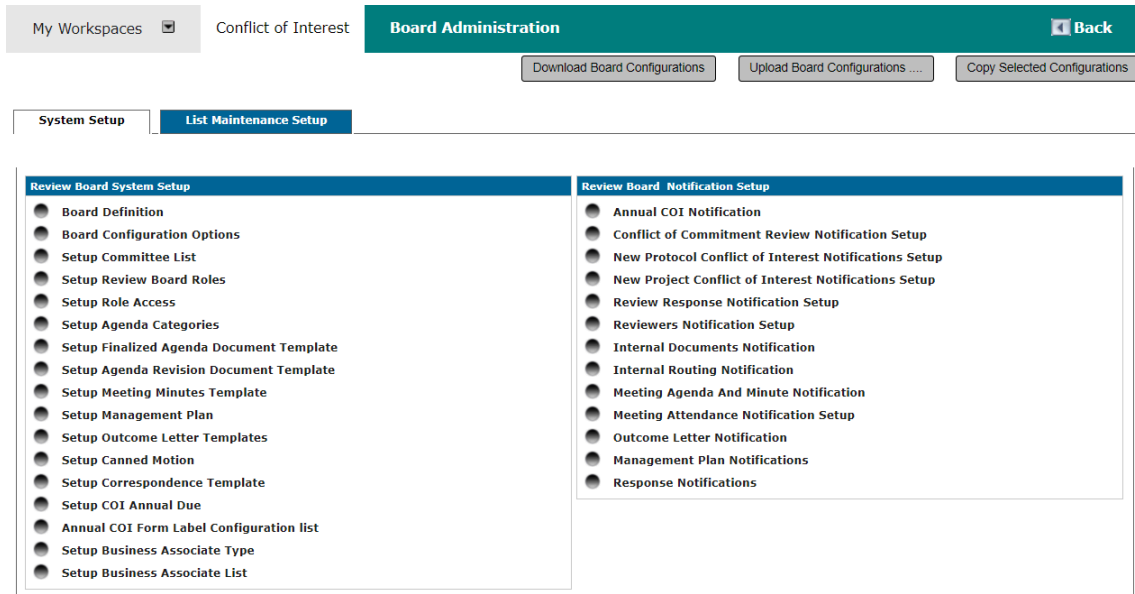
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Introduction

The iRIS™ Conflict of Interest Assistant module groups tasks relevant to management and tracking of conflicts of interest among Covered Persons. This manual is focused on Conflict of Interest Assistant Review Board Administration.



Navigation in iRIS™

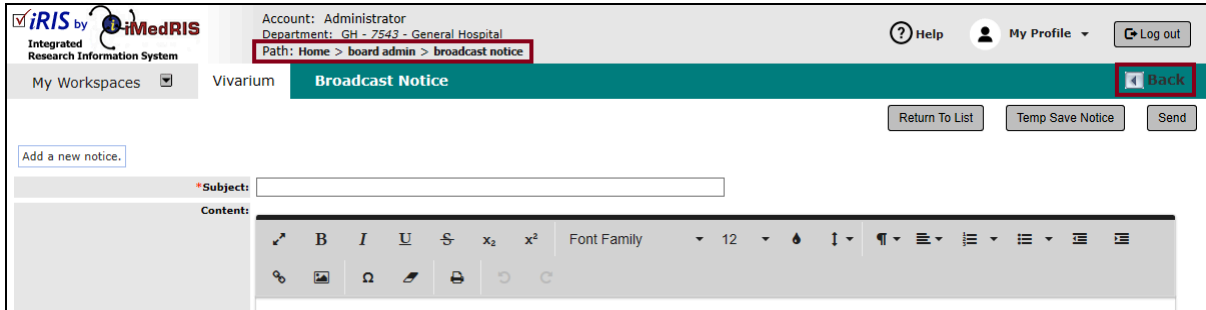
iRIS™ includes two standard navigation tools on all pages nested one or more levels beneath the primary Workspace page of the module currently in use (e.g., Study Assistant, Conflict of Interest Assistant, Animal Resource Center, etc.): a Path directory tree, and Back buttons.

Path Directory Tree

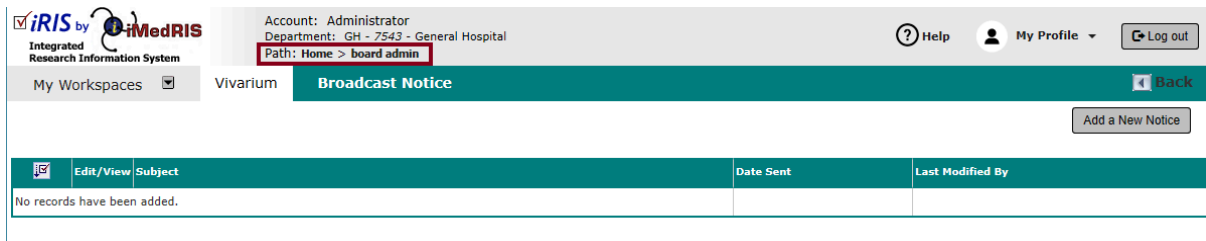
The **Path** item at the upper left of iRIS™ pages provides a hyperlinked menu directory tree, allowing the user to quickly navigate back through the path they followed to get to their current location. **Path** appears on all pages nested at least one level beneath the main workspace

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

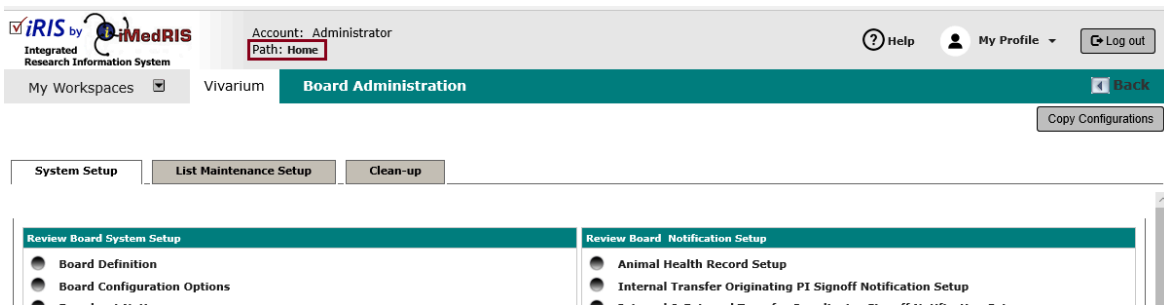
NOTE: screenshots in this section are primarily taken from the Animal Resource Center (ARC) module, but navigation functionality and features described in this section are the same in all modules.



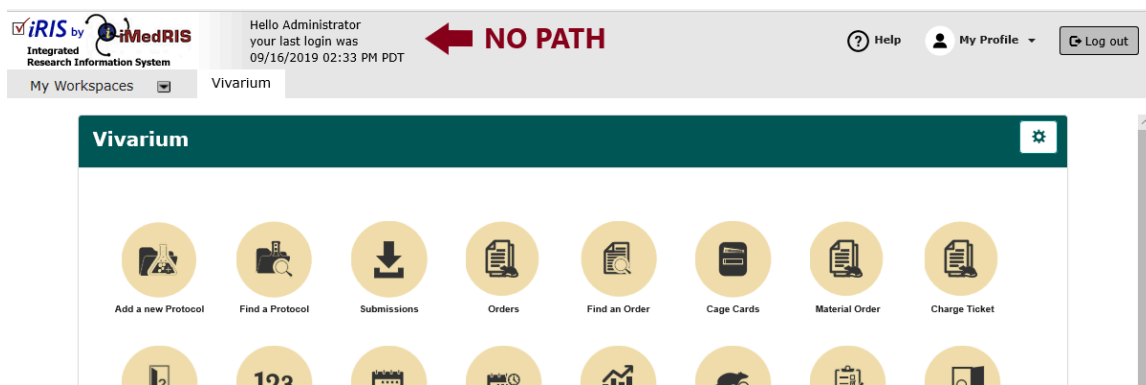
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



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

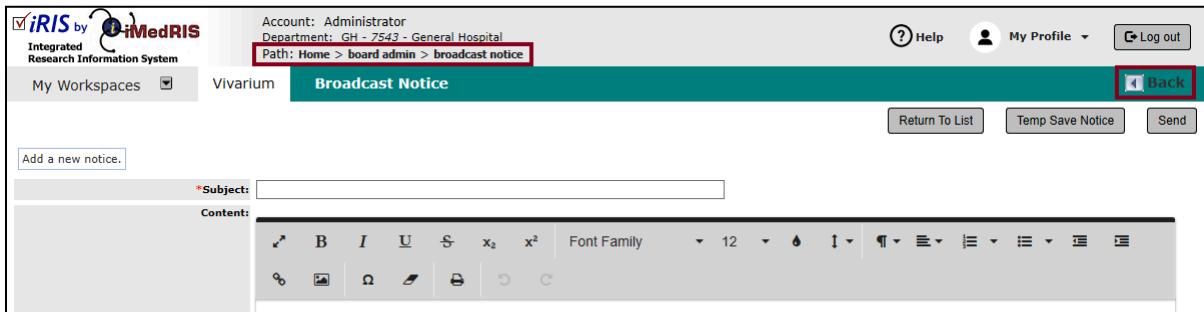


Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.

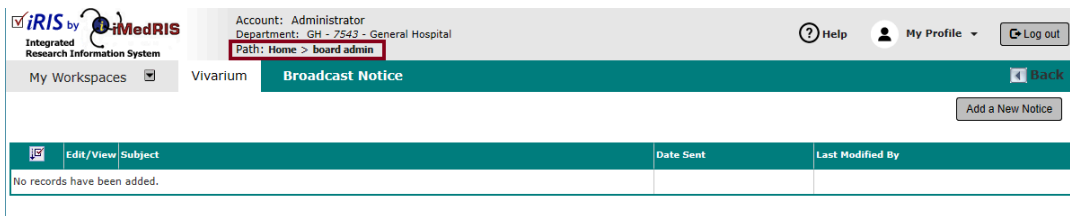


Back Button

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



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

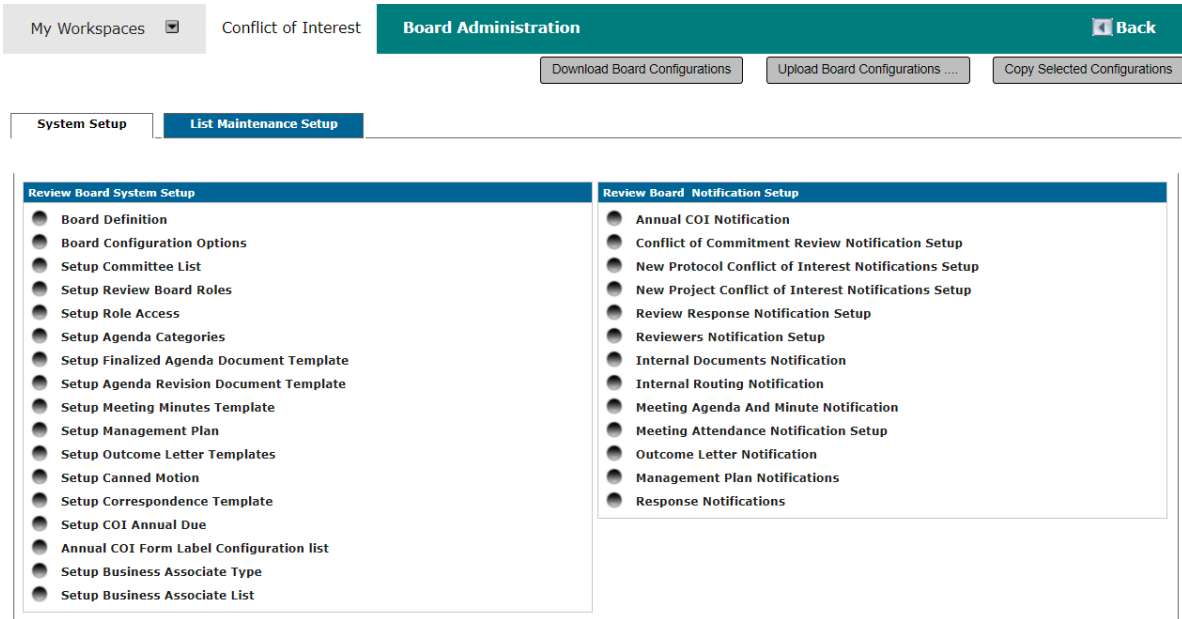


Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

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

System Setup Tab

System Setup is the first tab on the **Board Administration** page. This section allows review board administrators to manage general module setup, define review board details, set up review board roles and access, create document templates, change labels for data fields within the module, and perform similar module configuration tasks.



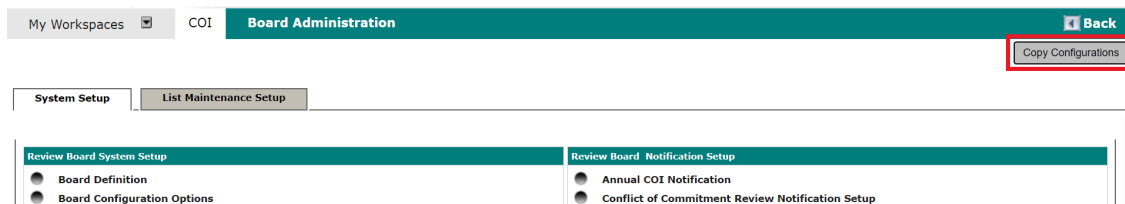
Copy Configurations

Copy Configurations is a tool that can be made available to full System Administrators (as opposed to those assigned to an Administrator role within a specific iRIS™ module) to help with initial setup of iRIS™ when two or more similar review boards are needed. The copy tool allows an iRIS™ system administrator to copy pre-existing, fully configured review board elements into a different, newly created review board.

Copy Configurations should not be used after setup of review boards is complete, nor in a live iRIS™ system. iMedRIS recommends performing a board configuration copy to a destination review board only once.

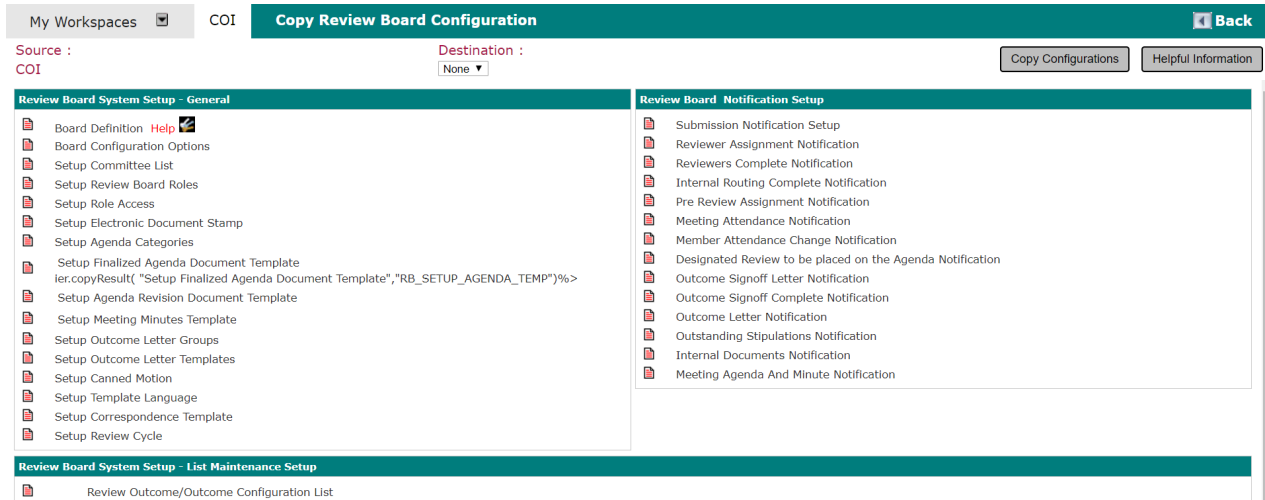
Note that configurations cannot be copied across review boards of different types (IRB to IBC, IRB to ARC, etc.). Within COI it is only possible to copy configurations across COI review boards.

Click the **Copy Configurations** button to copy a pre-existing COI review board configuration to another COI review board.

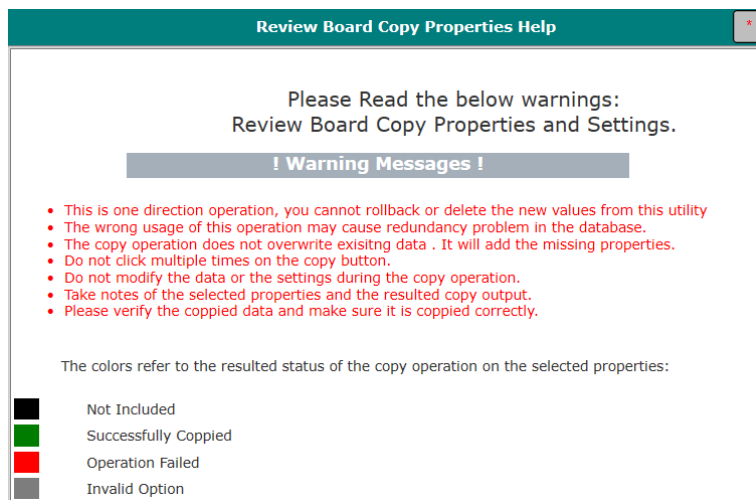


The **Copy Review Board Configuration** page displays. The page contains links to configurations that can be copied to another review board.

Note the **Destination** dropdown list at the top center of the page, and the **Helpful Information** button at right. The **Copy Configurations** button is non-functional until the **Destination** and at least one configuration item are selected (details follow below).



Click the **Helpful Information** button to view a popup containing important information and warnings about copying review board configurations.



Click the close window button in the upper right corner (marked with a red asterisk) to close the popup.

Back on the **Copy Review Board Configuration** page, select the target review board from the **Destination** dropdown list at the top of the page. The configuration **Source** is shown at the upper left, indicating the review board that is currently active. Only review boards of the same type will populate in the **Destination** dropdown list.

Select boxes for applicable configuration items in the setup lists are now unlocked. Note that certain configuration items of the COI review board cannot be copied. These include:

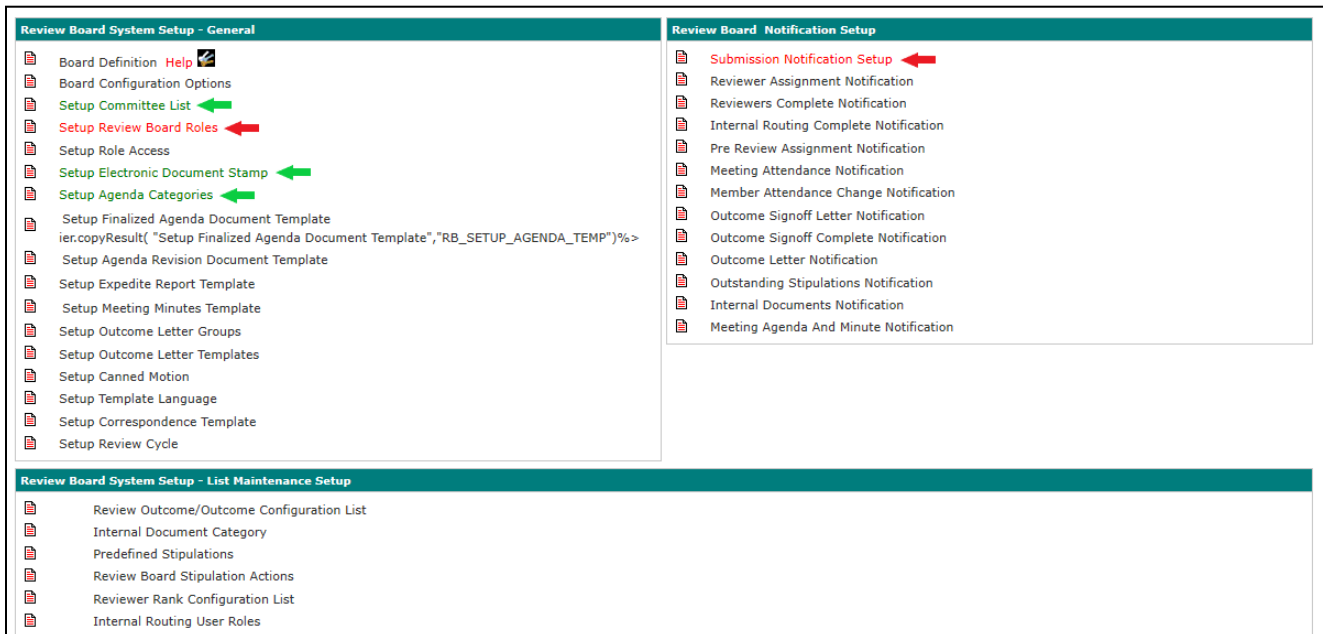
- Setup Review Board Roles
- Setup Electronic Document Stamp

- Setup Management Plan
- Setup Correspondence Template
- Setup COI Annual Due
- Annual COI Form Label Configuration List
- Annual COI Notification
- Conflict of Commitment Reviewer Notification Setup
- New Study/Project Conflict of Interest Notifications Setup
- Management Plan Notification
- Study Status Configuration List
- Configure COI Lists

Select the configuration item(s) to be copied to the selected destination by clicking the respective checkbox(es). Click the **Copy Configurations** button to complete the copy process. Click the **Cancel Copy** button to cancel the process without saving changes.

When the **Copy Configurations** button is clicked the copy process completes, and the **Copy Review Board Configuration** page refreshes.

Items where there is no data to copy, or where the corresponding field is not turned on in the destination review board, are not copied to the destination review board.

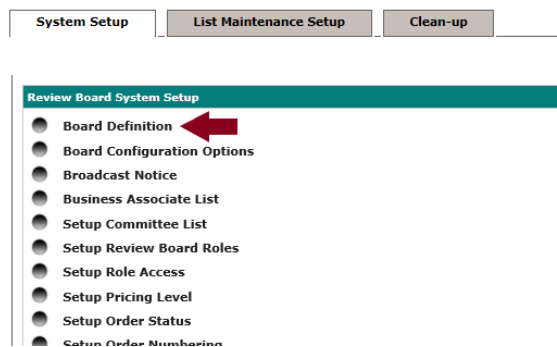


Any items successfully copied are color coded with green text. Items that did not copy successfully are color coded with red text.

Note: When performing a review board configuration copy from one board to another, fields that were originally pre-populated in the destination board will be overwritten with data copied from the source board.

Board Definition

Review boards are defined, edited and deleted in the Board Administration area. To define a board, Navigate to Conflict of Interest Assistant > Review Board Administration and click the **Board Definition** link on the **System Setup** tab.



The **Setup Board** page is opened.

The image shows the 'Setup Board' page. At the top, there are tabs for 'My Workspaces', 'COI', and 'Setup Board'. A 'Back' button is in the top right corner. Below the tabs is a 'Save Definition' button. The main form contains the following fields:

- *Review Board Name:** Text input field containing 'COI'.
- *Review Board Type:** Dropdown menu showing 'Conflict of Interest Assistant'.
- Assurance Number:** Text input field containing '3459723458'.
- Assurance Expiration:** Date picker showing '6/16/2022'.
- Comments:** Large text area.
- Primary Address:**
 - Street:** Text input field containing '123 Main Street'.
 - City:** Text input field containing 'Redlands'.
 - State:** Dropdown menu showing 'CA'.
 - Zip/Postal Code:** Text input field containing '92374'.
 - Country:** Dropdown menu showing 'United States'.
- Primary Phone:**
 - Phone Number:** Text input field containing '123-456-7890'.
- Primary E-mail:**
 - E-mail:** Text input field containing 'coirb@research.com'.

There are two required fields: **Review Board Name** and **Review Board Type**. The **Review Board Type** dropdown list contains predefined board types as specified in the institution’s contract with iMedRIS Data Corporation. The dropdown is disabled on this page, as the review board type has already been pre-defined in System Administration.

An Institutional Review Board (IRB) must have any required Assurance registered in order to receive research support from various funding and resource institutions. For example, an institution must have a Federalwide Assurance (FWA) registered in order to receive Health and Human Services (HHS) support for research involving human subjects.

Where applicable, enter the registered **Assurance Number** and **Assurance Expiration** date. If no Assurance is applicable to the board, skip these fields.

Use the **Comments** field to enter additional notes or comments about the board.

In the **Primary Address** section, enter **Street, City, State, Zip/Postal Code** and **Country**. This is the address that will appear on board documents and correspondences that include a board address.

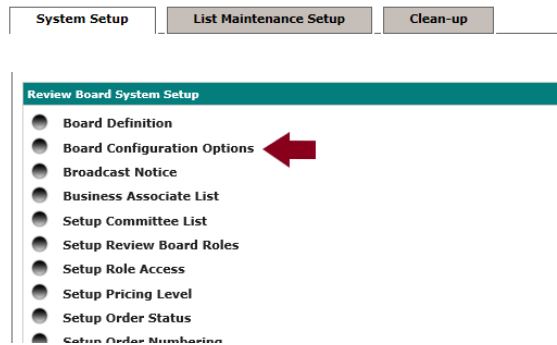
In the **Primary Phone** section, enter the **Phone Number** designated for contacting the board.

In the **Primary E-Mail** section, enter the **E-mail** address designated for contacting the board.

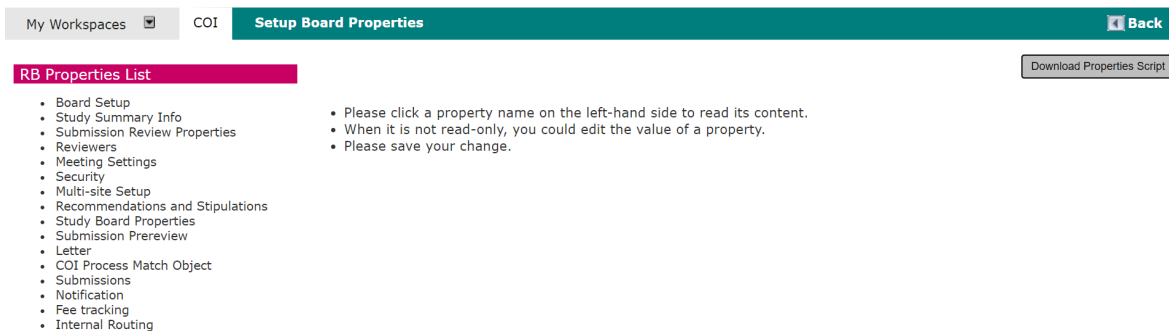
Click the **Save Definition** button at the upper right to save the record.

Board Configuration Options

To set or revise board configuration options, navigate to Conflict of Interest Assistant > Review Board Administration and click the **Board Configuration Options** link on the **System Setup** tab.



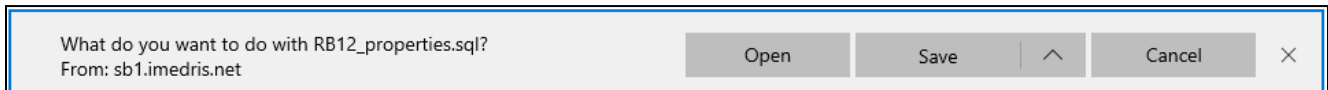
The **Setup Board Properties** page is opened. This page lists properties the administrator can set within the review board module.



It is the System Administrator’s responsibility to determine the property settings that will best align with the organization’s preferences before making changes.

If assistance is needed to ensure optimal settings, discuss intended changes with iMedRIS personnel before making the changes.

Click the **Download Properties Script** button to download a SQL script containing configurations for the review board properties, which can be used to import the configurations into another iRIS™ system.



Click an item in the **RB Properties List** to load an editable panel containing all properties related to that category.

Where available, Yes/No radio buttons turn the property “on” or “off”. A property with any **Property Value** other than Yes/No radio buttons is a variable.

The screenshot shows the "RB Properties List" interface. On the left is a tree view of categories: Board Setup, Study Summary Info, Submission Review Properties, Reviewers, Meeting Settings, Security, Multi-site Setup, Recommendations and Stipulations, Study Board Properties, Submission Prereview, Letter, Submissions, Notification, Fee tracking, and Internal Routing. The main area is a table with two columns: "Property Name" and "Property Value".

Property Name	Property Value
rb.allow_adult_benefit_assigned_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_adult_risk_assigned_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_change_of_business_associate_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_change_of_business_associate_type	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_change_of_device_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_change_of_drug_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_change_of_study_status	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_change_of_study_status_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_child_risk_assigned_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_document_outcome_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_issue_reporting_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_regulatory_determination1_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_regulatory_determination2_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_review_outcome_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_reviewer_rank_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_risk_assigned_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.allow_termination_reason_list	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.Auto_expire_exempt_protocols	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.display_date_board_rec_column	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.Edit_Master_Lay_Summary	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.Master_Lay_Summary_Label	Master Lay Summary
rb.notify_use_continuing_review_due	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.number_of_days_display_Last_Scanned_alert	2
rb.number_of_days_to_lock_submission	7
rb.number_of_unscanned_days_before_auto_deactivation	2
rb.restrict_change_of_rb_number	<input type="radio"/> Yes <input checked="" type="radio"/> No

At the top right of the interface are two buttons: "Download Properties Script" and "Save After Edit".

See the *Conflict of Interest — Properties manual* for more information on each individual property.

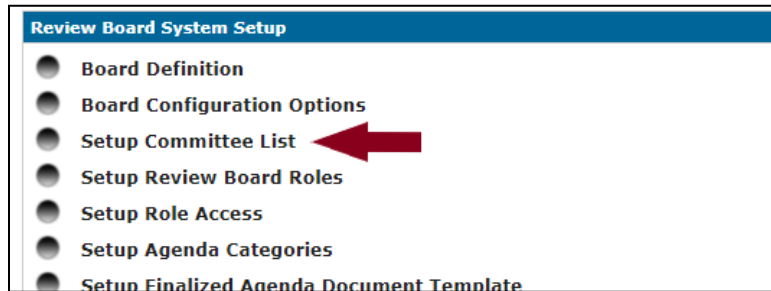
Setup Committee List

The **Setup Committee List** page is where current review board committees can be viewed, edited or deleted, and new committees added.

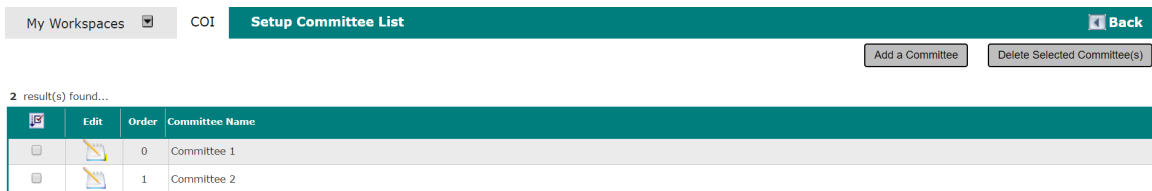
Note that there are costs to the institution for each review board and committee defined in their iRIS™ system.

Edit Committee

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



The **Setup Committee List** page is opened. Committees currently assigned to the review board are listed here. Click the icon in the **Edit** column for the applicable committee.



An edit panel opens.



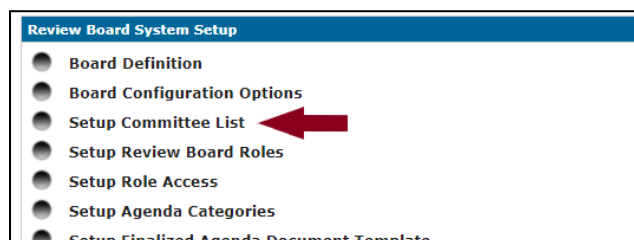
The **Order Number** defines routing priority order for the committee. Routing priority goes in ascending order, beginning with zero. If there is only one committee defined its **Order Number** will always be zero.

The **Description** is the committee name.

When changes are complete click the **Save Committee** button to save changes and close the edit panel.

Add Committee

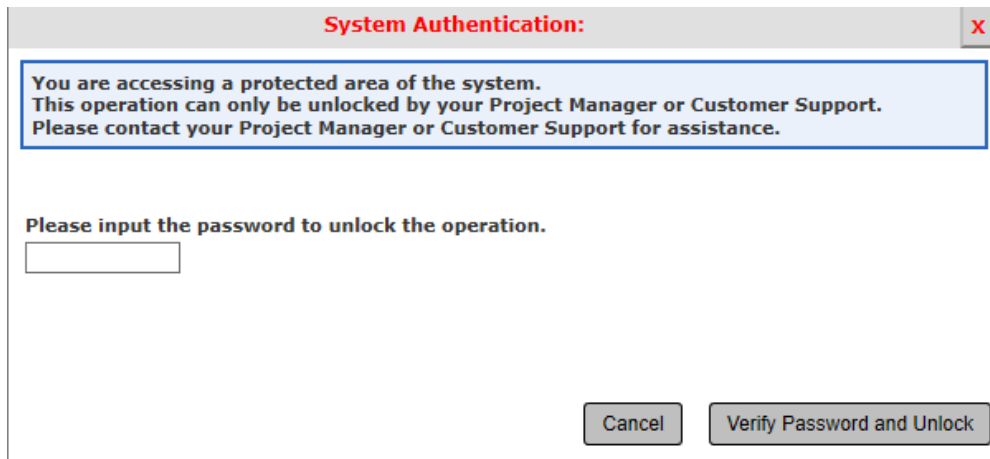
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



The **Setup Committee List** page is opened. Click the **Add a Committee** button.



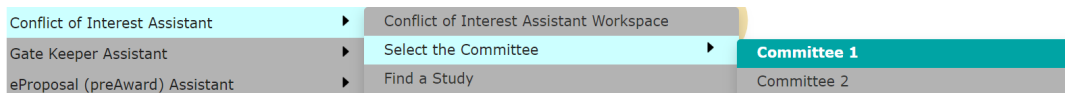
A **System Authentication** popup displays, warning that only iMedRIS Project Managers and Customer Support personnel have the necessary rights to add new review board committees.



This area is locked because there are costs to the institution for each review board and committee defined in their iRIS™ system.

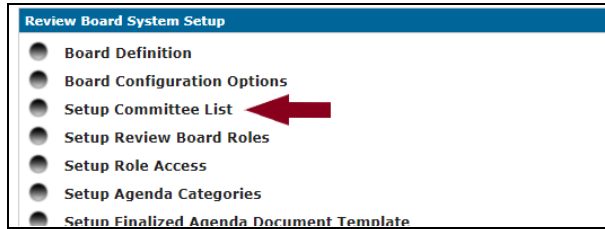
When an iMedRIS Project Manager or Customer Support representative adds a new committee, it is added to the **Setup Committee List** page.

User accounts assigned to more than one review board committee have a slightly modified main menu, enabling them to select the applicable committee for various tasks.



Delete Committee

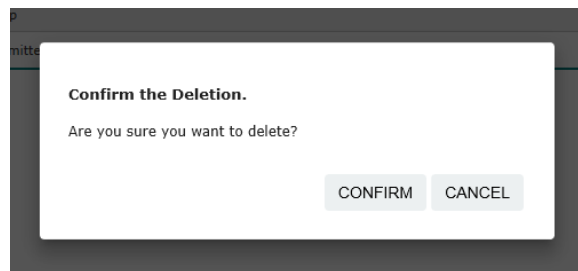
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



The **Setup Committee List** page is opened. Select the checkbox in the far-left column for the applicable committee(s) and click the **Delete Selected Committee(s)** button.



A confirmation popup displays.



Click the **CANCEL** button to return to the **Setup Committee List** page without deleting the selected committee(s).

Click the **CONFIRM** button to confirm the deletion and return to the **Setup Committee List** page.

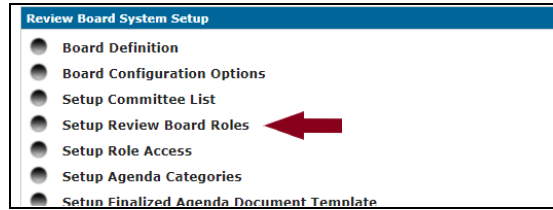
Note: caution must be exercised when deleting committees, as deleting a committee with review tasks assigned to it will disrupt and potentially orphan those tasks.

Also recall that review board committees can only be added by designated iMedRIS personnel, so if a needed committee is deleted in error there may be some delay in recreating it.

Setup Review Board Roles

The **Setup Roles List** page is where review board member roles can be viewed, edited or deleted, and new roles added. Each member role can be customized to allow for inclusion or exclusion on agenda and correspondence routing, as well as to allow for or prohibit designation of an alternate iRIS™ user to fulfill the duties of the role when the assigned user is unavailable.

The page is accessed via Conflict of Interest Assistant > Review Board Administration > System Setup > **Setup Review Board Roles** link.



My Workspaces ▼ COI **Setup Roles List** Back Add a New Board Role

Filter By In Use: Yes No Find

13 result(s) found... 1 - 10

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	No
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

Filter By In Use is set to “Yes” by default. Select “No” here to display roles that are not currently in use. *Note that this is a toggled setting, it is not possible to view both in use and not in use roles in a single list.*

Columns in the **Setup Roles List** table are:

- **Delete:** where it is possible to delete a role, click the icon in this column to delete a role record; note that the icon does not appear for roles that cannot be deleted
- **Edit:** click the icon in this column to open a role record for editing
- **Order:** priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number
- **Role Name:** name assigned to the role; note that role names can be modified by the institution
- **Reserved:** a “Yes” in this column indicates the role is **Reserved** and cannot be deleted; a “No” here indicates the role is not **Reserved** and *can* be deleted, provided it is not currently in use (see next item, below)
- **In-Use:** a “Yes” in this column indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a “No” here indicates the role is not currently in use and can be deleted

- **Allow Alternate:** a “Yes” in this column indicates an alternate person who is included in the Alternate For list under Conflict of Interest Assistant > User Management > Grant User Access & Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable; a “No” here indicates no alternate can be specified for the role
- **Include on Agenda:** a “Yes” in this column indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to “No” users assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting
- **Include in Correspondence:** a “Yes” in this column indicates persons assigned to this role is/are to be included on the correspondence routing list; a “No” here indicates persons assigned to this role is/are not included on the correspondence routing list

As shown below, ten **Reserved** review board roles are predefined by default.

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	Yes
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Alternate Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Data Entry Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

Reserved roles are always designated as **In-Use** regardless of whether the applicable role is currently assigned to any studies/protocols.

In the example below, **Filter By In Use** is toggled to “No” to limit the list to **Roles** not currently in use. Notice that the role is not **Reserved**, as indicated by a “No” in that column, and a **Delete** icon is provided for the role.

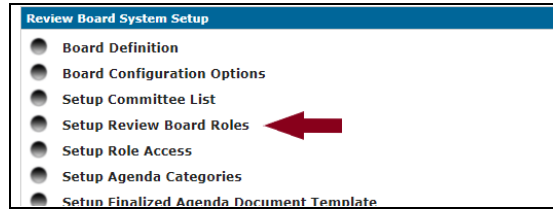
Filter By In Use: Yes No

1 result(s) found...

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		12	NIH Auditor	No	No	Yes	Yes	Yes

Edit Board Role

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab and click the **Setup Review Board Roles** link.



The **Setup Roles List** page is opened.

My Workspaces COI **Setup Roles List** Back Add a New Board Role

Filter By In Use: Yes No Find

13 result(s) found... 1 - 10 ▶

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	No
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

Filter By In Use is set to “Yes” by default. Select “No” here to display roles that are designated as not in use. *Note that this is a toggled setting, it is not possible to view both in use and not in use roles in a single list.*

Click the icon in the **Edit** column for the role.

The role is opened for editing in the **Edit a Board Role** panel. Edit each item in the panel as desired.

My Workspaces COI **Setup Roles List** Back Back To List Save

Edit a Board Role.

*Order Number:

*In Use: Yes No

*Role Name:

*Allow Alternate for Meetings: Yes No

*Include in Minutes and Agenda?: Yes No

*Include in Correspondence?: Yes No

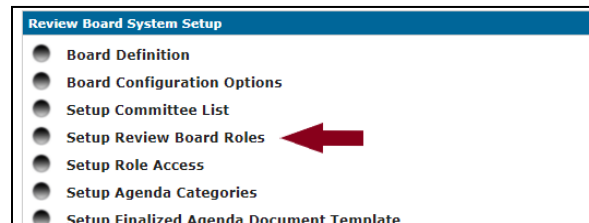
- **Order Number:** priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number
- **In-Use:** a selection of “Yes” indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a selection of “No” here indicates the role is not currently in use and can be deleted

- **Role Name:** name assigned to the role; note that role names can be modified by the institution
- **Allow Alternate for Meetings:** a selection of “Yes” indicates an alternate person who is included in the Alternate For list under Conflict of Interest Assistant > User Management > Grant User Access & Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable; a “No” here indicates no alternate can be specified for the role
- **Include in Minutes and Agenda?:** a selection of “Yes” indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to “No” users assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting
- **Include in Correspondence:** a selection of “Yes” indicates persons assigned to this role is/are to be included on the correspondence routing list; a “No” here indicates persons assigned to this role is/are not included on the correspondence routing list

Make desired edits and click the **Save** button to save changes, close the edit panel and return to the **Setup Roles List** page. Click the **Back To List** button to return to the **Setup Roles List** page without saving changes.

Add Board Role

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab and click the **Setup Review Board Roles** link.



The **Setup Roles List** page is opened. Click the **Add a New Board Role** button.

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	No
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

The **Add a Board Role** panel opens for the role, with the same fields and buttons as the edit panel.

My Workspaces ▼ COI **Setup Roles List** Back

Back To List Save

Add a Board Role.

*Order Number:

*In Use: Yes No

*Role Name:

*Allow Alternate for Meetings: Yes No

*Include in Minutes and Agenda?: Yes No

*Include in Correspondence?: Yes No

Default selections for the **Add a Board Role** panel are shown above. *Note that the **Order Number** field defaults to the next available **Order Number**, based on the existing list of roles.*

Enter the desired **Role Name** and edit other items as desired.

- **Order Number:** priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number
- **In-Use:** a selection of “Yes” indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a selection of “No” here indicates the role is not currently in use and can be deleted
- **Allow Alternate for Meetings:** a selection of “Yes” indicates an alternate person who is included in the Alternate For list under Conflict of Interest Assistant > User Management > Grant User Access & Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable; a “No” here indicates no alternate can be specified for the role
- **Include in Minutes and Agenda?:** a selection of “Yes” indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to “No” users

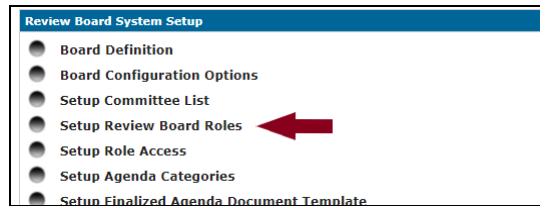
assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting

- **Include in Correspondence:** a selection of “Yes” indicates persons assigned to this role is/are to be included on the correspondence routing list; a “No” here indicates persons assigned to this role is/are not included on the correspondence routing list

Click the **Save** button to save changes and return to the **Setup Roles List** page. Click the **Back To List** button to return to the **Setup Roles List** page without saving changes.

Delete Board Role

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab and click the **Setup Review Board Roles** link.



The **Setup Roles List** page is opened.

My Workspaces COI **Setup Roles List** [Back](#)

[Add a New Board Role](#)

Filter By In Use: Yes No

13 result(s) found... 1 - 10 ▶

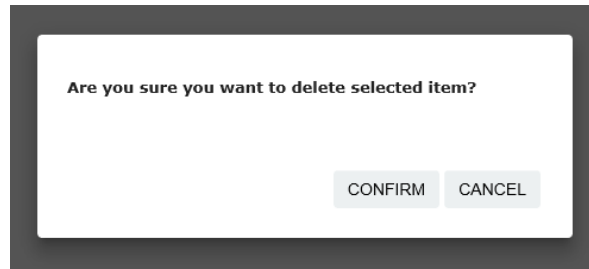
Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	No
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

Because **Reserved** roles and in-use roles cannot be deleted, there are no icons in the **Delete** column for those roles on the **Setup Roles List** page.

Change the **Filter By In Use** option to “No” and click the **Find** button to view a list of roles that can be deleted. Click the icon in the **Delete** column to delete a role.

Filter By In Use: <input type="radio"/> Yes <input checked="" type="radio"/> No Find								Add a New Board Role	
1 result(s) found...									
Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence	
		12	NIH Auditor	No	No	Yes	Yes	Yes	

A confirmation popup window appears. Click **CANCEL** to return to the **Setup Roles List** page without saving changes. Click **CONFIRM** to delete the role and return to the **Setup Roles List** page.



Setup Role Access

The **Setup Role Access** page is where the System Administrator assigns read and write access privileges to review board roles for applicable iRIS™ pages.

My Workspaces		COI		Setup Role Access												Back							
																						Save Changes	
Screen Name	Board Member		Coordinator		Chairperson		Data Entry Member		Non-Voting Member		Alternate Member		Vice-Chairperson		Ex-Member								
	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write							
Review Board Assistant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submissions Not Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submissions Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submissions Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submissions Agenda	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submission General Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submission Preview Screening Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submission Correspondence Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submission Vote/Ack Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Submission Outcome Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							

All applicable iRIS™ pages for the module are listed in a column at the left side of the matrix. Column headers display all applicable review board roles.

The System Administrator assigns **Read** and **Write** privileges for each page by role. The applicable system page is shown in the column at left, and the System Administrator clicks the **Read** and/or **Write** select checkboxes in the role columns at right to assign the applicable rights.

If both are selected, users assigned to the role can view and update records on the applicable page. If the page allows for record deletion, users assigned to a role with both **Read** and **Write** access for the page can delete records on the page as well.

If **Read** is selected but **Write** is not, users assigned to the role can view the applicable page but cannot modify or delete records on the page.

Note that any role with **Write** access must also have **Read** access assigned.

The first two **Read** and **Write** columns do not have an associated role. These columns are used to turn access on or off for the applicable page, regardless of user role. Settings in these columns override settings in the role-specific columns to the right.

Screen Name			Board Member		Coordinator	
	Read	Write	Read	Write	Read	Write
Review Board Assistant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submissions Not Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submissions Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submissions Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submissions Agenda	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submission General Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submission Preview Screening Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submission Correspondence Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submission Review Summary Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To make a given page read-only for *all* iRIS™ users, the system administrator selects the **Read** checkbox and de-selects the **Write** checkbox for the page.

To hide a page entirely the System Administrator de-selects both checkboxes for the page.

Where both checkboxes are selected for a given page, the system administrator can assign **Read** and **Write** access per role using the checkboxes in the columns at the right.

Click the **Save Changes** button to save changes.

Document Templates

The iRIS™ system provides tools for creation of pre-formatted document templates that include commonly used boilerplate text and can pull a variety of system data into a document on the fly, when a document is generated.

The general process for template setup and use is the same, regardless of the document or correspondence type.

- **Template Definition:** a template containing standardized boilerplate text for the desired document or correspondence type (e.g., meeting agenda, meeting minutes, vendor email, outcome letter, etc.) is created and formatted in a rich text editor
- **Merge Code Addition:** where the document or correspondence type needs to include specific data pulled from the iRIS™ system (e.g., order number, review board name, vendor email address, quantity of animals ordered, etc.), the applicable Merge Code for each needed data item is added to the template

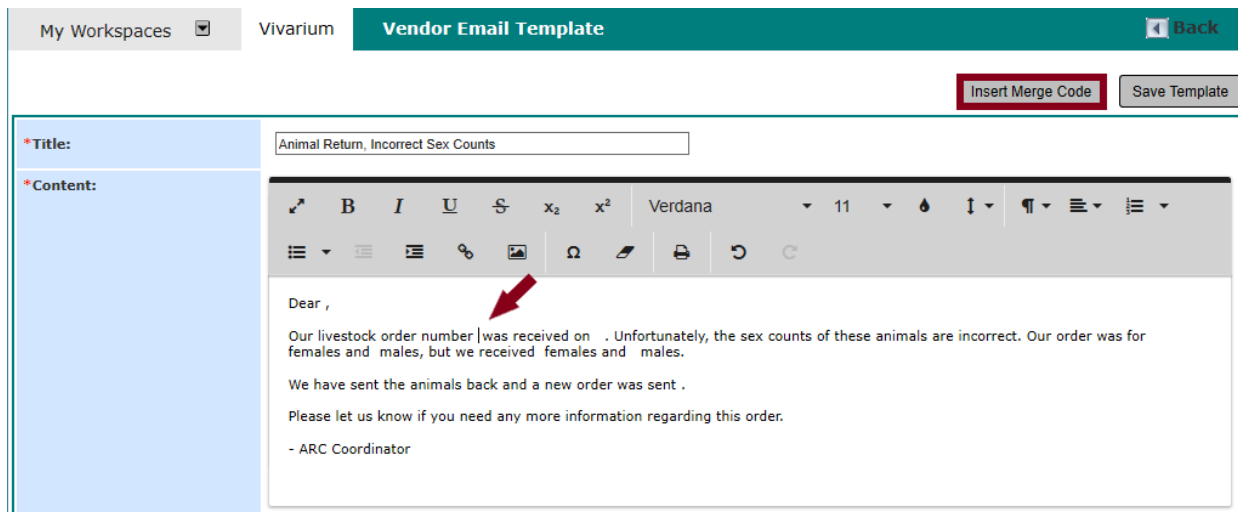
- **Document / Correspondence Generation:** when a template-based document / correspondence is generated by an iRIS™ user, the pre-formatted template serves as the default starting point for the document / correspondence; the user edits the document / correspondence as desired before printing or sending it

The use of templates reduces time and effort demands on the user, reduces user error, and streamlines enforcement of institutional communication standards and policies.

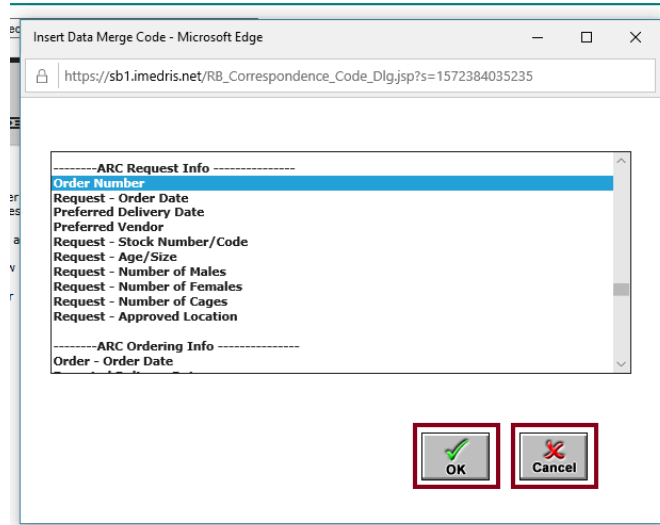
Using Merge Codes in Document Templates

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

NOTE: screenshots and examples in this section are primarily taken from the Animal Resource Center (ARC) module, but functionality and features described in this section are the same for Conflict of Interest Assistant as for ARC.

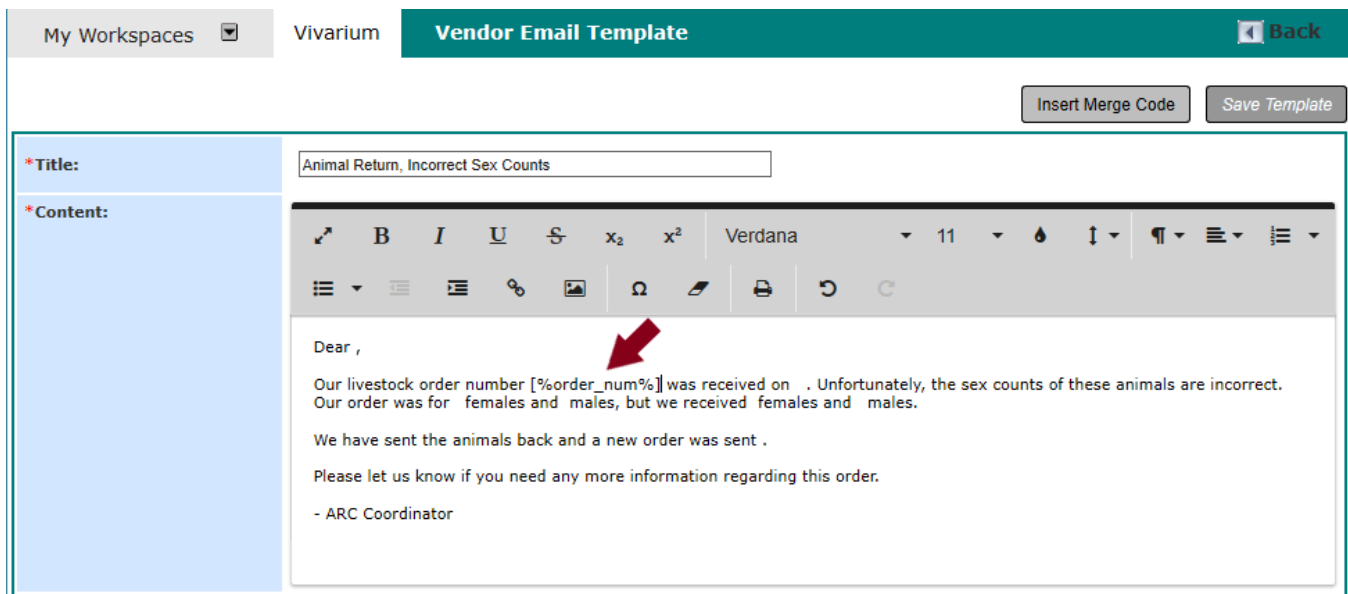


The **Insert Data Merge Code** popup window displays. Scroll down to the sections of the list labeled for ARC and select the desired Merge Code. In this example, the Merge Code for “Order Number” is selected.

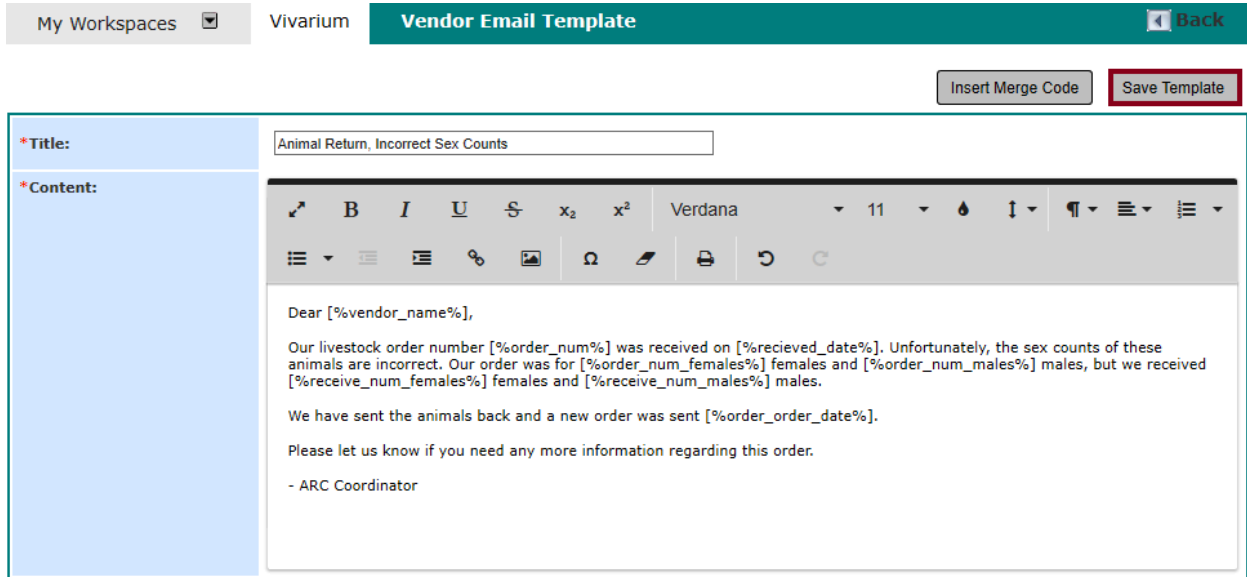


Click the **Cancel** button to close the popup without inserting the Merge Code.

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.



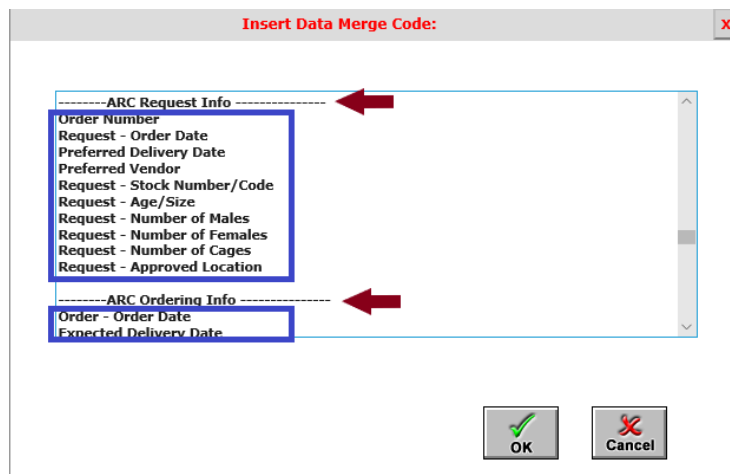
Click the **Save Template** button to save changes.

Merge Code List

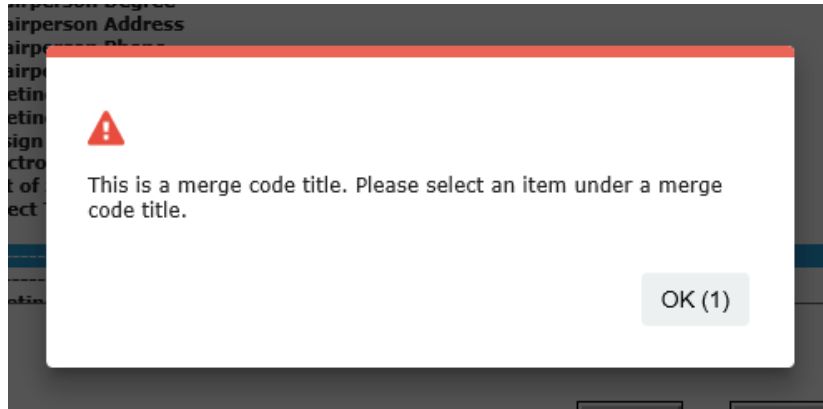
Depending on the user’s data access rights and the institution’s Review Board Administration settings, the Merge Code list can include system data from the following categories:

Review Board	Study Financial Information
Meetings	Submission Information
Multi-Site	ARC Request Information
Study Personnel	ARC Ordering Information
Study Contacts	ARC Receiving Information
Form Creator	ARC 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 a template. If a title item is selected and the **OK** button is clicked, an error popup window displays.



Merge Codes Applicable to Meetings

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

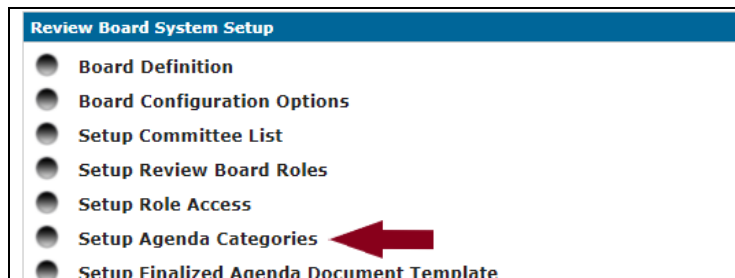
---Review Board Info ---	---Meeting Attendance Codes ---	---Submission Info ---
Review Board Name	Meeting Call to Order	Submission Approval Date
Review Board Committee Name	Meeting New Business	Submission Type
Chairperson Name (Last Name, First Name)	Meeting Old Business	Submission List of all reviewers
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

Setup Agenda Categories

The iRIS™ system provides the ability to configure a list of agenda topic categories that are frequently addressed in review meetings, including the ability to attach relevant forms or documents where applicable.

Once configured, these categories can be added to a finalized agenda template with just a few clicks rather than repetitive keystrokes (see the Setup Finalized Agenda Document Template section of this manual for more information).

This functionality is provided on the **Set-up Agenda Categories** page. To access the page, click the **Setup Agenda Categories** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.

My Workspaces		COI	Set-up Agenda Categories		Back
	Edit	Group Name	Merge Code	Group Display Order	
<input type="checkbox"/>		Conflict's assigned to Meeting	FULL_BOARD_MATCHES	1	
<input type="checkbox"/>		Expedited and Process Administratively assigned to Meeting	EXPEDITED_MATCHES	2	

Columns and controls on this page are:

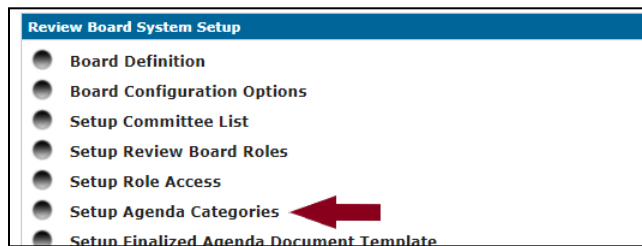
- **select**: far-left column, no header label; select the desired checkbox(es) here to select the corresponding record(s)
- **Edit**: click the icon in this column to open the corresponding category for editing
- **Group Name**: designated category name
- **Merge Code**: designated short text to be used in document templates, such as the Finalized Agenda Document Template, to pull the corresponding category name and any associated form or document requirements into the template
- **Group Display Order**: the order in which the applicable category is to be shown on the meeting agenda
- **Add Agenda Filter** button: click this button to open the Set-up Agenda Filter page, where rules can be configured to exclude study or review item documents from the meeting

agenda that would otherwise be captured by an agenda category (see next subsection of this manual, Agenda Filter)

- **Add Group** button: click this button to open an add panel for creation of a new agenda category
- **Delete Group(s)** button: click this button to delete any agenda category selected in the far-left column

Add Agenda Category

Click the **Setup Agenda Categories** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.

My Workspaces		COI	Set-up Agenda Categories		Back
				Add Group	Delete Group(s)
Edit	Group Name	Merge Code	Group Display Order		
<input type="checkbox"/>	Conflict's assigned to Meeting	FULL_BOARD_MATCHES	1		
<input type="checkbox"/>	Expedited and Process Administratively assigned to Meeting	EXPEDITED_MATCHES	2		

Click the **Add Group** button. An add panel is opened for creation of the new category.

My Workspaces		COI	Set-up Agenda Categories		Back
				Save All Changes	
Group Name*	<input type="text" value="Conflict's assigned to Meeting"/>				
Group Order*	<input type="text" value="1"/>				
Group Merge Code*	<input type="text" value="FULL_BOARD_MATCHES"/>				

Complete the top of the add panel as follows:

- **Group Name:** enter a descriptive name for the category; recall that categories are used when creating a finalized agenda document template, so the name entered here should indicate the contents of the category
- **Group Order:** the entry in this field is shown in the Group Display Order column of the **Set-up Agenda Categories** page, and dictates the order in which this category appears in the finalized agenda document template

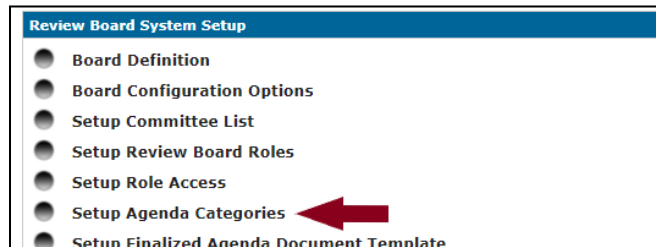
- **Group Merge Code:** enter the desired merge code to be used for inclusion of this category on forms and in document templates; *note that the code must include underscores where spaces occur between words, and cannot include any special characters (e.g., &, #, etc.)*

See the Using Merge Codes in Document Templates section of this manual for more information about working with merge codes.

Click the **Save All Changes** button to save the record. The category is added on the **Set-up Agenda Categories** page.

Edit Agenda Category

Click the **Setup Agenda Categories** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.

My Workspaces		COI	Set-up Agenda Categories		Back
Group Name	Merge Code	Group Display Order			
Conflict's assigned to Meeting	FULL_BOARD_MATCHES	1			
Expedited and Process Administratively assigned to Meeting	EXPEDITED_MATCHES	2			

Click the icon in the **Edit** column for the applicable category. The category is opened for editing.

My Workspaces		COI	Set-up Agenda Categories		Back
				Save All Changes	
Group Name*	Conflict's assigned to Meeting				
Group Order*	1				
Group Merge Code*	FULL_BOARD_MATCHES				

Make any desired changes to fields at the top of the edit panel as follows:

- **Group Name:** descriptive name for the category; recall that categories are used when creating a finalized agenda document template, so the name entered here should indicate the contents of the category
- **Group Order:** the entry in this field is shown in the Group Display Order column of the **Set-up Agenda Categories** page, and dictates the order in which this category appears in the finalized agenda document template

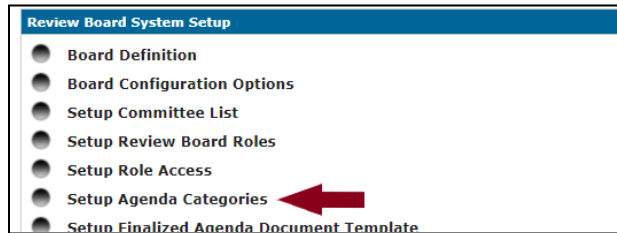
- **Group Merge Code:** enter the desired merge code to be used for inclusion of this category on forms and in document templates; *note that the code must include underscores where spaces occur between words, and special characters (e.g., &, #, etc.) are not allowed*

See the Using Merge Codes in Document Templates section of this manual for more information about working with merge codes.

When all desired changes to the category are complete, click the **Save All Changes** button to save changes and close the edit panel.

Delete Agenda Category

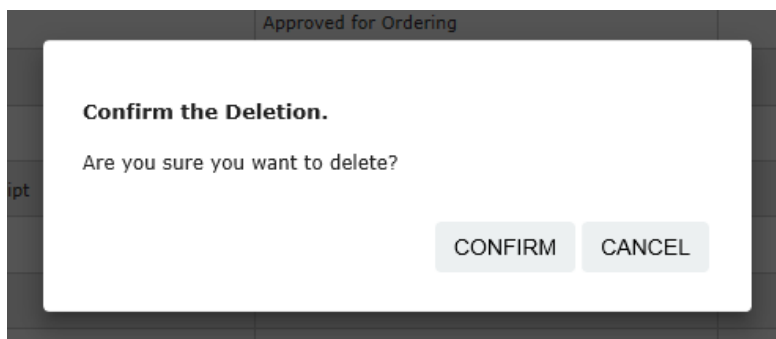
Click the **Setup Agenda Categories** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.

My Workspaces		COI	Set-up Agenda Categories		Back
	Edit	Group Name	Merge Code	Group Display Order	
<input type="checkbox"/>		Conflict's assigned to Meeting	FULL_BOARD_MATCHES	1	Add Group Delete Group(s)
<input type="checkbox"/>		Expedited and Process Administratively assigned to Meeting	EXPEDITED_MATCHES	2	

Select the checkbox in the far-left column for the applicable category(ies), then click the **Delete Group(s)** button. A confirmation popup window displays.



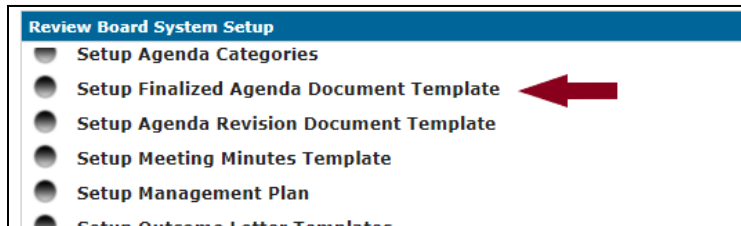
Click **CANCEL** to return to the **Set-up Agenda Categories** page without deleting the category(ies).

Click **CONFIRM** to delete the category(ies) and return to the **Set-up Agenda Categories** page. The category is deleted.

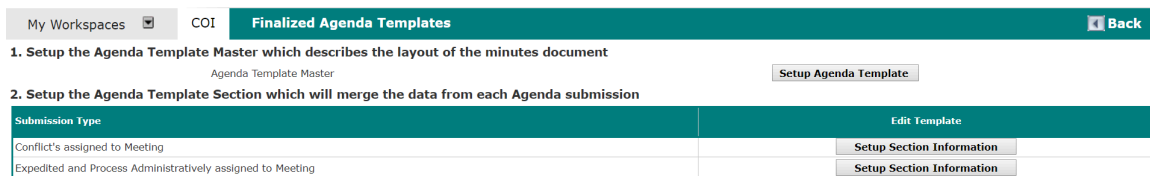
Setup Finalized Agenda Document Template

The iRIS™ system provides the ability to configure finalized meeting agenda templates that include commonly used boilerplate text and can automatically pull a variety of system data into the agenda when it is generated.

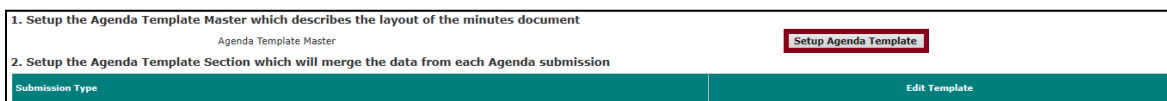
This functionality is provided on the **Finalized Agenda Templates** page. To access the page, click the **Setup Finalized Agenda Document Template** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



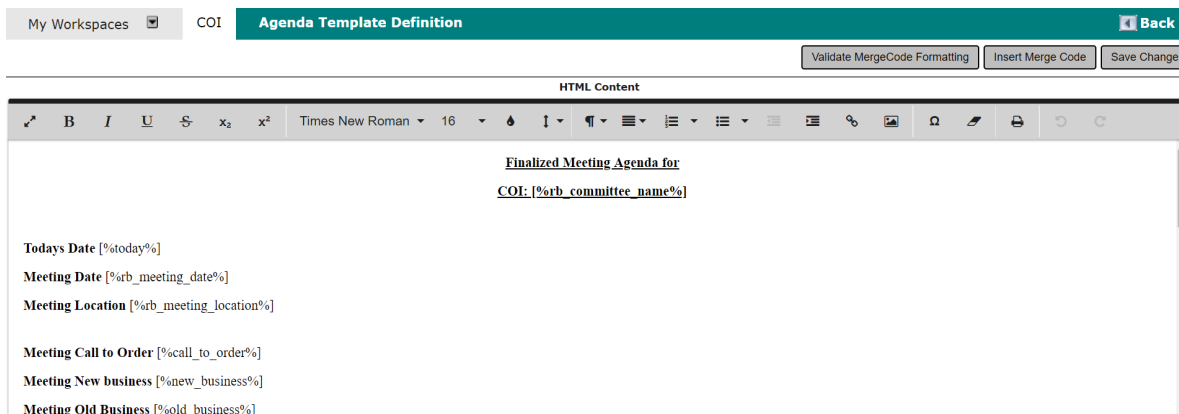
The **Finalized Agenda Templates** page opens, as shown below. Notice the two instruction items and the corresponding button type for each.



As indicated in the instructions, the first step is setting up the Agenda Template Master. Click the **Setup Agenda Template** button to begin.



The **Agenda Template Definition** text editor page opens, as shown below.



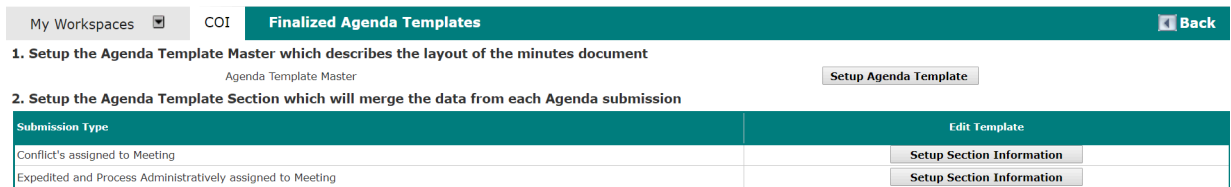
Enter desired boilerplate text and Merge Codes and apply formatting as desired using the provided rich text editor toolbar. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

Recall that this template will serve as the basis for all finalized agenda documents, and therefore it should include all items considered standard and necessary to any finalized agenda.

When template content is complete, click the **Save Change** button to close the page and save the template.

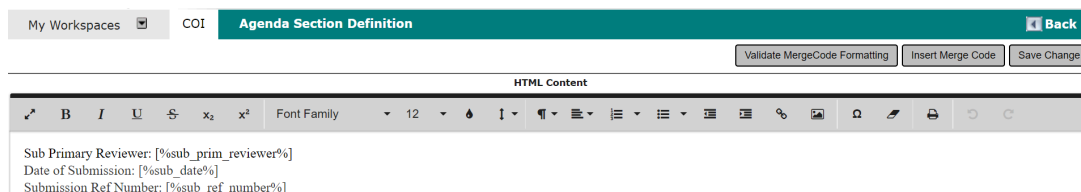
Back on the **Finalized Agenda Templates** page, any previously configured, custom agenda category sections are listed in the lower section of the screen. Each section can be configured to specify what information is to be displayed for each submission in the agenda template master.

See the Setup Agenda Categories section of this manual for more information about configuration of custom agenda categories.



Again, recall that the template will serve as the basis for *all* finalized agenda documents; custom agenda categories should only be added to the template if those categories are applicable to most meeting agendas.

Click the **Setup Section Information** button for any agenda category to be added to the finalized agenda template. The **Agenda Section Definition** page opens, as shown below.



The boilerplate text and Merge Codes entered here depend on the purpose of the agenda category.

When section definition content is complete, click the **Save Change** button to close the page and save the section definition.

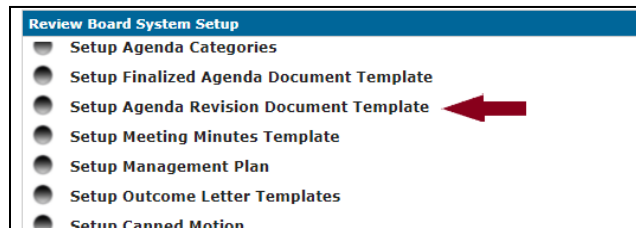
Going forward, each agenda generated for a specific meeting date will consist of one document that includes both the Agenda Template Master and any custom sections configured as above.

See the Conflict of Interest Assistant – Meetings manual for more information about meeting functionality in iRIS™.

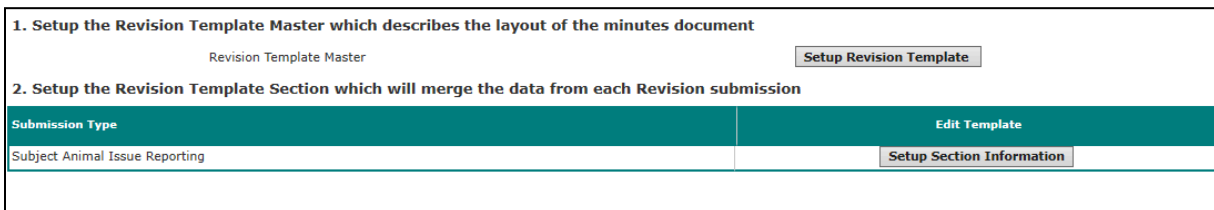
Setup Agenda Revision Document Template

The Revision Agenda Template is used to generate an addendum when a new submission is placed on the agenda *after* the initial Agenda is published for a given meeting date.

This functionality is provided on the **Setup Board Agenda Revision Templates** page. To access the page, click the **Setup Agenda Revision Document Template** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Setup Board Agenda Revision Templates** page opens, as shown below.



Notice that this page is nearly identical to the Finalized Agenda Templates page, with the exception that where the Finalized Agenda Templates page is used to configure the Agenda Template Master, this page is used to configure the Revision Template Master.

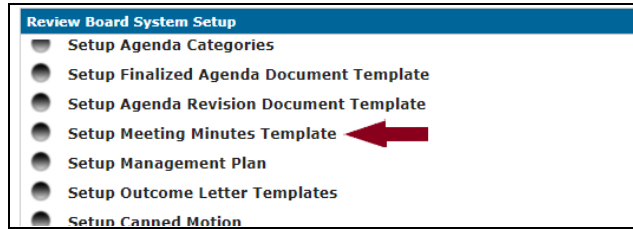
Where this feature is in use it is often necessary for the institution to configure applicable agenda categories to capture the most common agenda revision scenarios and related, pertinent data. See the Setup Agenda Categories section of this manual for more information about configuration of custom agenda categories.

The process of configuring the Revision Template Master is the same as that for configuration of the Agenda Template Master. See the Setup Finalized Agenda Document Template section of this manual for details of template configuration.

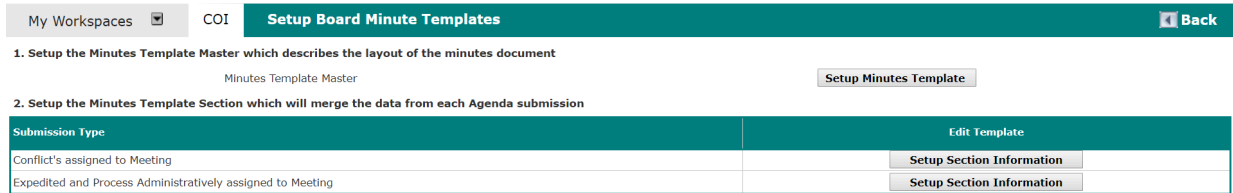
Setup Meeting Minutes Template

The Meeting Minutes Template is used to generate a standardized minutes document for a given meeting date.

This functionality is provided on the **Setup Board Minute Templates** page. To access the page, click the **Setup Meeting Minutes Template** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Setup Board Minute Templates** page opens, as shown below.



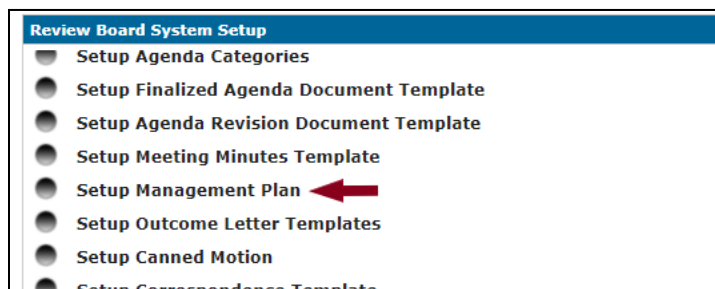
Notice that this page is nearly identical to the Finalized Agenda Templates page, with the exception that where the Finalized Agenda Templates page is used to configure the Agenda Template Master, this page is used to configure the Minutes Template Master.

The process of configuring the Minutes Template Master is the same as that for configuration of the Agenda Template Master. See the Setup Finalized Agenda Document Template section of this manual for details of template configuration.

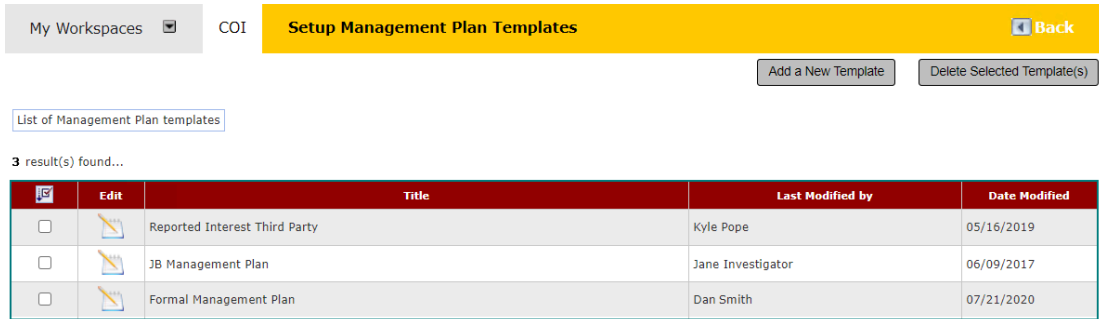
Setup Management Plan

The iRIS™ system provides the ability to configure standardized COI management plan templates that include commonly used boilerplate text and can automatically pull a variety of system data into the documents when they are generated.

This functionality is provided on the **Setup Management Plan** page. To access the page, click the **Setup Management Plan** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.

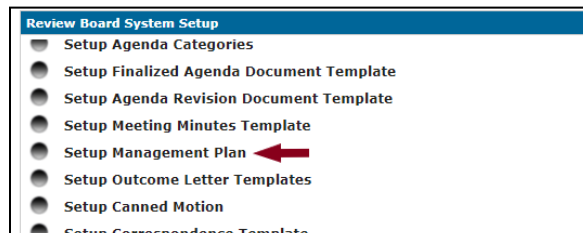


The **Setup Management Plan** page opens, as shown below.

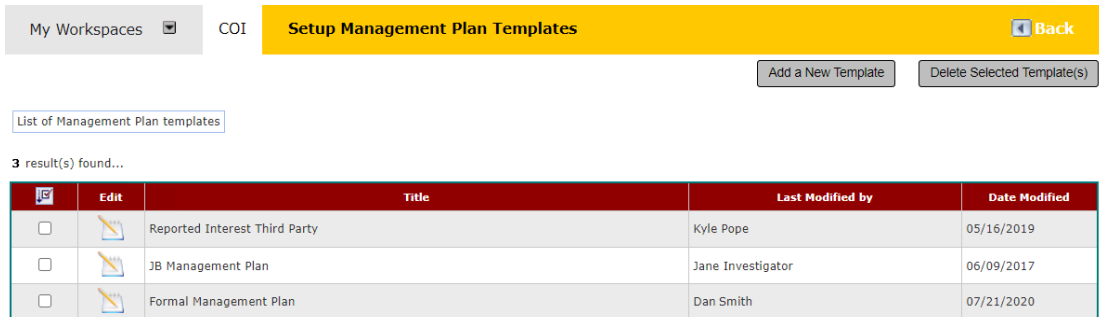


Add Management Plan

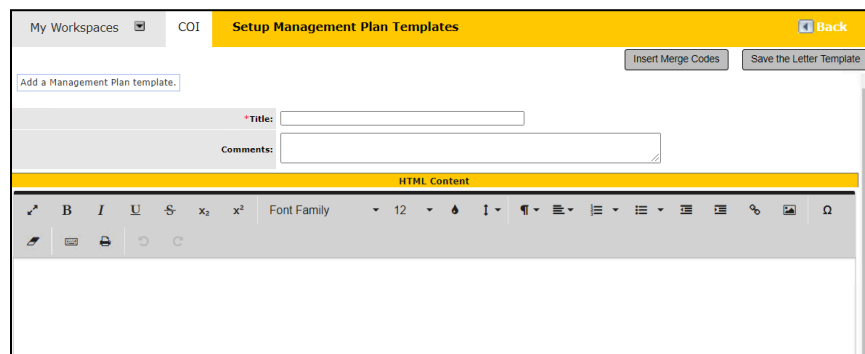
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Management Plan** link.



The **Setup Management Plan** page opens, as shown below.



Click the **Add a New Template** button. As shown below, the **Add a letter template** panel opens for creation of the new letter.



Enter the desired **Title** and **Comments**.

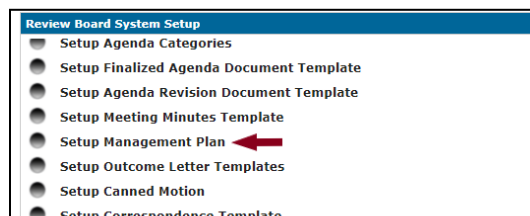
Enter desired text and Merge Codes in the main text editor window. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

Apply any desired formatting, then click the **Save the Letter Template** button.

The template is added on the **Setup Board Letter Templates** page.

Edit Management Plan

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Management Plan** link.



The **Setup Management Plan** page opens, as shown below.

My Workspaces COI **Setup Management Plan Templates** [Back](#)

[Add a New Template](#) [Delete Selected Template\(s\)](#)

List of Management Plan templates

3 result(s) found...

<input type="checkbox"/>	Edit	Title	Last Modified by	Date Modified
<input type="checkbox"/>		Reported Interest Third Party	Kyle Pope	05/16/2019
<input type="checkbox"/>		JB Management Plan	Jane Investigator	06/09/2017
<input type="checkbox"/>		Formal Management Plan	Dan Smith	07/21/2020

Click the icon in the **Edit** column for the applicable template. As shown below, the template is opened for editing.

My Workspaces COI **Setup Management Plan Templates** [Back](#)

[Insert Merge Codes](#) [Save the Letter Template](#)

Edit a Management Plan template.

Title:

Comments:

HTML Content

COI Management Plan

Dear [%coi_covered_person%],

This is a COI Management Plan for you to adhere to. Instructions are provided below. We require you to follow these Management Strategies:

[%coi_mngnt_strategies%]

Please make sure you follow all of them.

Thank You,

The COI Review Board

Make desired changes to the **Title** and **Comments** fields.

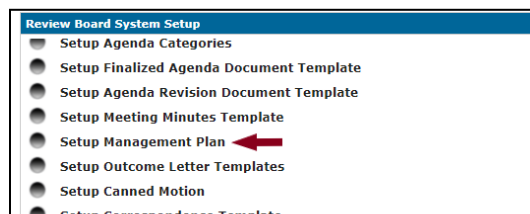
Make desired changes to text and Merge Codes in the main text editor window. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

Apply any desired formatting, then click the **Save the Letter Template** button.

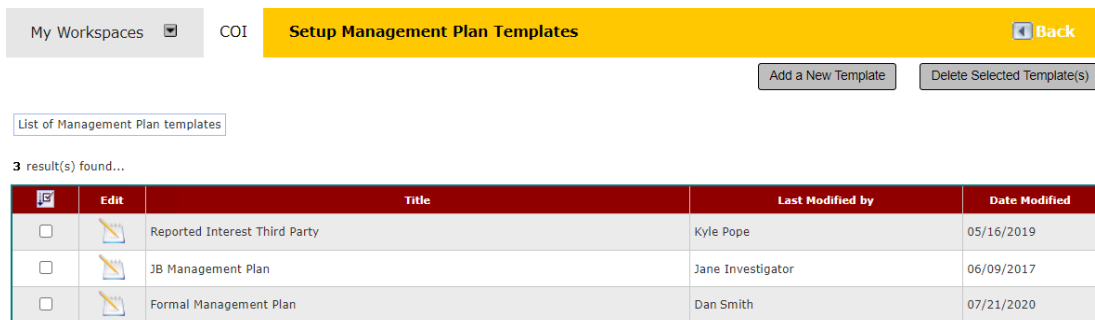
The template is revised on the **Setup Board Letter Templates** page.

Delete Management Plan

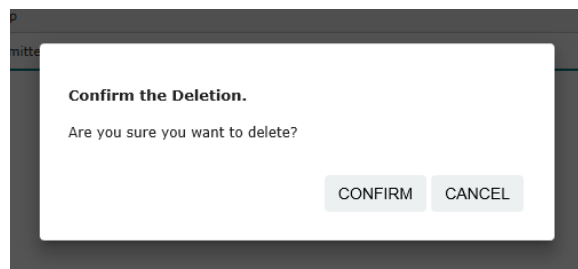
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Management Plan** link.



The **Setup Management Plan** page opens, as shown below.



Select the checkbox in the far-left column for the item to be deleted and click the **Delete Selected Template(s)** button. A confirmation popup displays.



Click the **CANCEL** button to return to the **Setup Management Plan Templates** page without deleting the selected template(s).

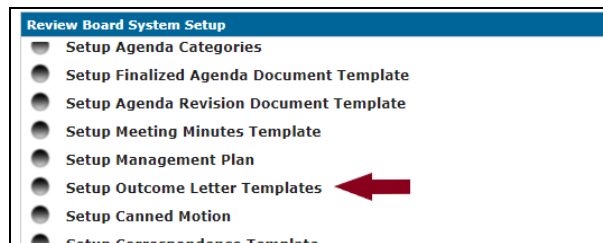
Click the **CONFIRM** button to confirm the deletion and return to the **Setup Management Plan Templates** page.

The item is deleted on the **Setup Management Plan Templates** page.

Setup Outcome Letter Templates

The iRIS™ system provides the ability to configure standardized outcome letter templates that include commonly used boilerplate text and can automatically pull a variety of system data into the letters when they are generated.

This functionality is provided on the **Setup Board Letter Templates** page. To access the page, click the **Setup Outcome Letter Templates** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Setup Board Letter Templates** page opens, as shown below.

My Workspaces ▼ COI **Setup Board Letter Templates** Back

Add a New Template Delete Selected Template(s)

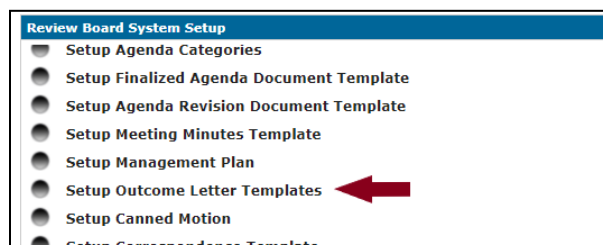
List of letter templates

4 result(s) found...

<input type="checkbox"/>	Edit	Title	Letter Type	Last Modified by	Date Modified
<input type="checkbox"/>		Assigned Analyst for further investigation	Submission	Admin Admin admin	08/16/2019
<input type="checkbox"/>		Conflict Approved	Submission	Admin Admin admin	07/08/2019
<input type="checkbox"/>		Conflict Requires Management Plan	Submission	Admin Admin admin	08/16/2019
<input type="checkbox"/>		Outcome General Letter	Outcome - General	Admin Admin admin	08/16/2019

Add Outcome Letter Template

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



The **Setup Board Letter Templates** page opens, as shown below.

My Workspaces COI Setup Board Letter Templates Back

Add a New Template Delete Selected Template(s)

List of letter templates

4 result(s) found...

<input type="checkbox"/>	Edit	Title	Letter Type	Last Modified by	Date Modified
<input type="checkbox"/>		Assigned Analyst for further investigation	Submission	Admin Admin admin	08/16/2019
<input type="checkbox"/>		Conflict Approved	Submission	Admin Admin admin	07/08/2019
<input type="checkbox"/>		Conflict Requires Management Plan	Submission	Admin Admin admin	08/16/2019
<input type="checkbox"/>		Outcome General Letter	Outcome - General	Admin Admin admin	08/16/2019

Click the **Add a New Template** button. As shown below, the **Add a letter template** panel opens for creation of the new letter.

My Workspaces COI Setup Board Letter Templates Back

Validate Mergecode Formatting Insert Merge Codes Save the Letter Template

Add a letter template.

*Title:

Letter Type: Outcome - General

Comments:

HTML Content Check In/Out

B I U x₂ x² Font Family 12

Enter the desired **Title** and **Comments**, then click in the **Letter Type** field and click to select an item in the dropdown list. As shown below, the list includes two default entries:

- **Outcome - General:** letter templates of this type appear as options available for selection on the Outcome Letter tab of submission processing screens
- **Submission:** letter templates of this type appear as options available for selection on the Submission Received Notification Letter tab of submission processing screens

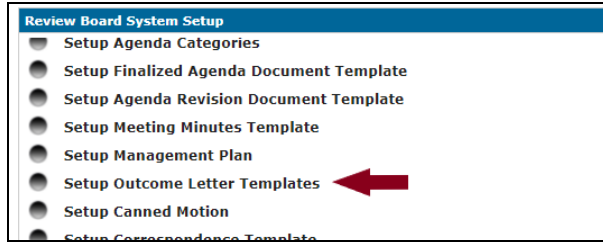
Enter desired text and Merge Codes in the main text editor window. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

Apply any desired formatting, then click the **Save the Letter Template** button.

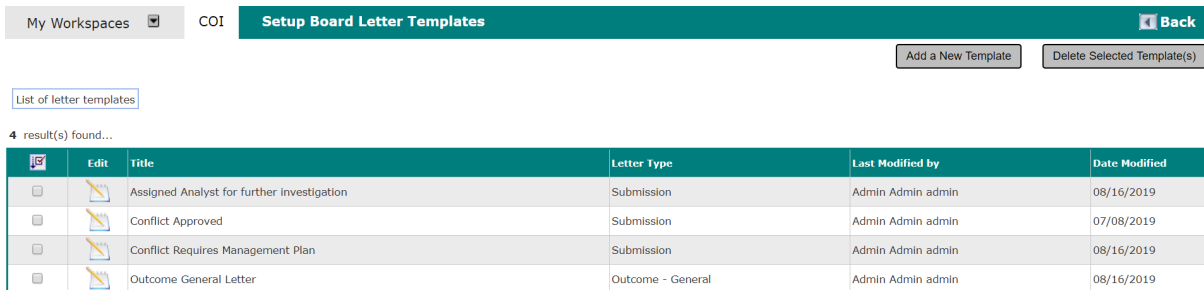
The template is added on the **Setup Board Letter Templates** page.

Edit Outcome Letter Template

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



The **Setup Board Letter Templates** page opens, as shown below. Click the icon in the **Edit** column for the applicable template.



As demonstrated in the example below, the template is opened for editing in an **Edit a letter template** panel.



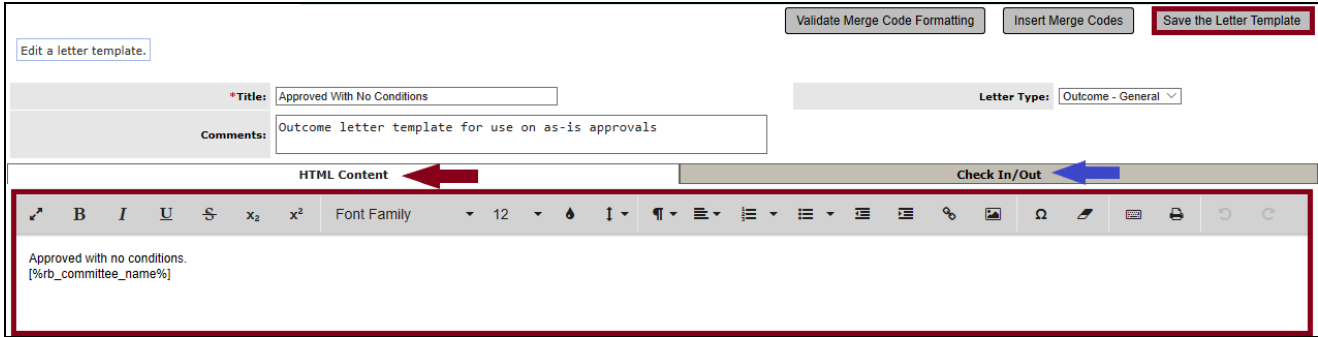
Make desired changes to the **Title**, **Comments** and **Letter Type** fields. The **Letter Type** list includes two default entries:

- **Outcome - General**: letter templates of this type appear as options available for selection on the Outcome Letter tab of submission processing screens
- **Submission**: letter templates of this type appear as options available for selection on the Submission Received Notification Letter tab of submission processing screens

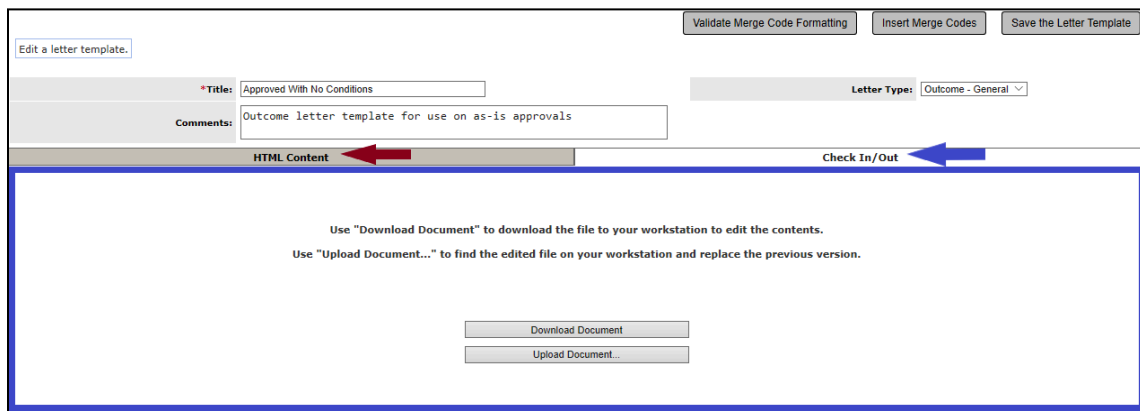
The two tabs in the lower part of the edit panel offer two different methods for revising the template’s content.

The **HTML Content** tab allows for direct editing in the text editor window.

When all desired revisions are complete using the **HTML Content** tab, click the **Save the Letter Template** button to save changes and close the edit panel.




Click the **Check In/Out** tab (blue arrow in screenshot above) to access the second editing method. As shown below, the **Check In/Out** tab is opened.



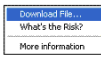
As per the instructions provided on this tab, click the **Download Document** button to download a copy of the letter template in RTF format. The **Download the RB Template Letter Content** page opens, as shown below.

INSTRUCTIONS

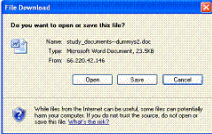
Step 1:
If your browser blocks pop - ups, then after a few moments a bar similar to the one shown below may appear in your browser.

 To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options...

Simply click on the bar and a small drop down list will appear. Click **Download File** from the list of options.

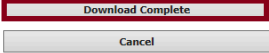


Step 2:
In a few moments, your browser will prompt you to either **Open** or **Save** the file (see example below).
Note: this is not the actual File Download box, it is only a picture. In order to Check - out the document and edit it, you will need to **Save** it to your workstation.




To do so, click **Save**. This will open up a window similar to the one shown below that allows you to choose where in your workstation you would like to save the document.

Once you've selected where you will save the document, click **Save**. After this, the Download Complete box will appear as shown below. From here you can choose to open the document to edit it, open the folder that contains the document, or Close the Download Complete box to edit the document later.



Step 3:
IT IS VERY IMPORTANT that after you've saved the file to your workstation and closed the Download Complete box that you click the **Download Complete** button in iRIS. This allows you to check the document (or upload the document) back into iRIS once you've finished editing it. To cancel the Document Check - Out, click **Cancel**. Note: If you've already saved the file to your computer, the file will remain in your computer, however you will simply lose the option of checking the document back in.



IMPORTANT: READ AND FOLLOW THE DIRECTIONS PROVIDED ON THE PAGE TO ENSURE UPLOAD OF THE REVISED DOCUMENT WILL BE ENABLED. See items boxed in red in the screenshot above.

Make desired changes to the downloaded copy of the letter template in any rich text editor and save the file under the same name as the original download.

Return to the **Setup Board Letter Templates** page and click the icon in the **Edit** column for the applicable template. Click the **Check In/Out** tab (shown below) and click the **Upload Document** button.

Validate Merge Code Formatting Insert Merge Codes Save the Letter Template

Edit a letter template.

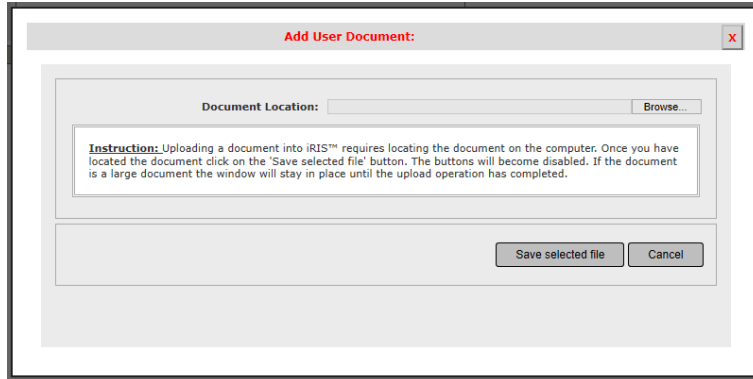
*Title: Letter Type:

Comments:

HTML Content **Check In/Out**

Use "Download Document" to download the file to your workstation to edit the contents.
Use "Upload Document..." to find the edited file on your workstation and replace the previous version.

An **Add User Document** popup opens, as shown below.



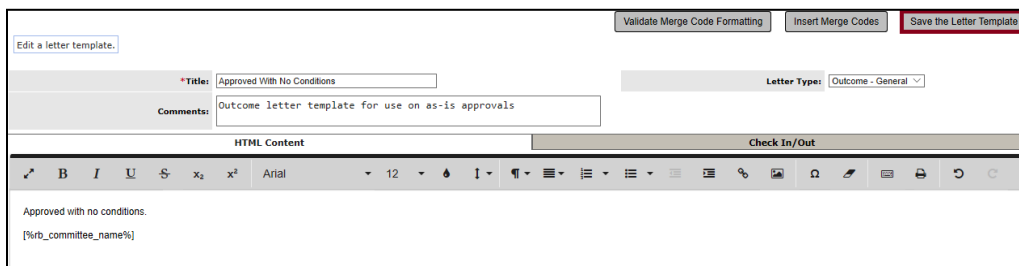
Follow the directions in the popup to navigate to the revised file on the local computer and upload it to the iRIS™ system. As shown below, a countdown popup briefly appears as the upload is processed.

Please Wait ...



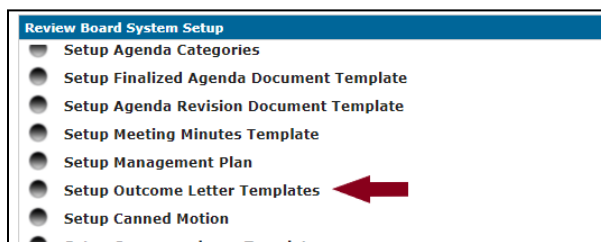
iRIS is uploading the file to the server.
This operation may take a moment.

When the popup closes, back in the Edit a letter template panel, click the **Save the Letter Template** button to save changes and close the edit panel.



Delete Outcome Letter Template

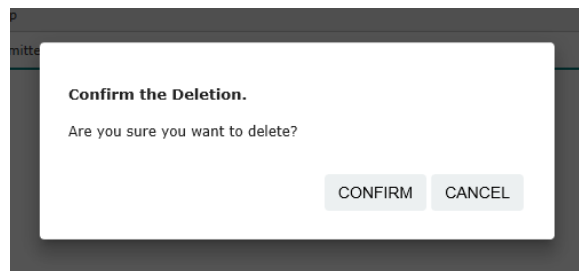
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



The **Setup Board Letter Templates** page opens, as shown below. Select the checkbox(es) in the far-left column for the template(s) to be deleted, then click the **Delete Selected Template(s)** button.

<input type="checkbox"/>	Edit	Title	Letter Type	Last Modified by	Date Modified
<input type="checkbox"/>		Assigned Analyst for further Investigation	Submission	Admin Admin admin	08/16/2019
<input type="checkbox"/>		Conflict Approved	Submission	Admin Admin admin	07/08/2019
<input type="checkbox"/>		Conflict Requires Management Plan	Submission	Admin Admin admin	08/16/2019
<input type="checkbox"/>		Outcome General Letter	Outcome - General	Admin Admin admin	08/16/2019

A confirmation popup displays.



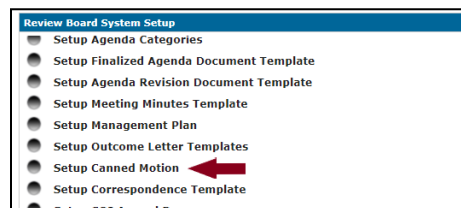
Click the **CANCEL** button to return to the **Setup Board Letter Templates** page without deleting the selected template(s).

Click the **CONFIRM** button to confirm the deletion and return to the **Setup Board Letter Templates** page.

Setup Canned Motion

The iRIS™ system provides the ability for institutions to configure a list of predefined (“canned”) motions for use in review board meetings. There is no limit to the number of canned motions that can be configured in this list.

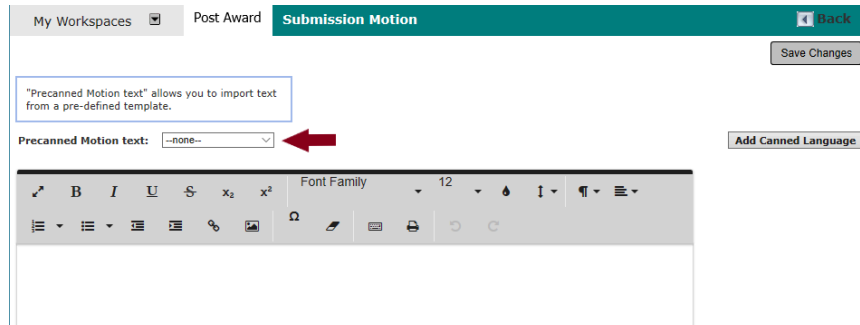
To access the list, click the **Setup Canned Motion** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Setup Canned Motion List** page opens.

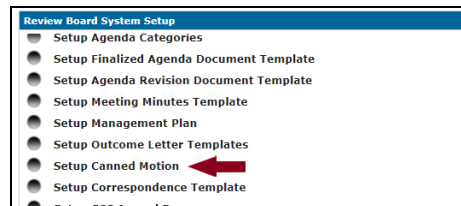


Any canned motion configured here is added to the **Precanned Motion text** dropdown list on the Vote tab of Submission processing screens.

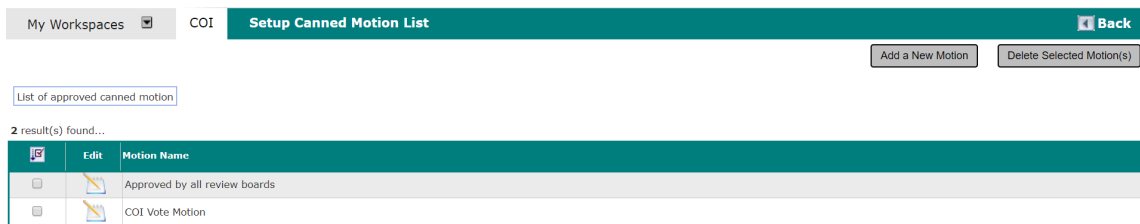


Add Canned Motion

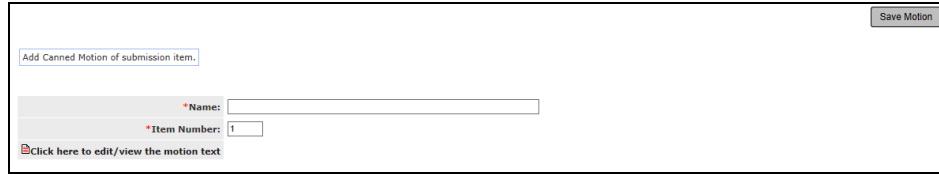
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



The **Setup Canned Motion List** page opens.



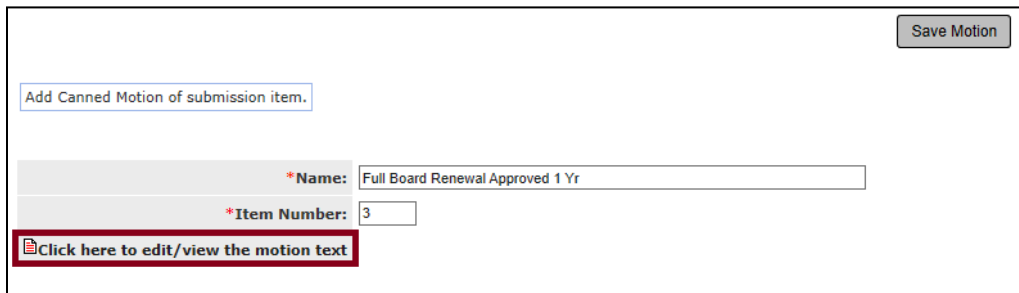
As shown below, an **Add Canned Motion of submission item** panel opens for configuration of the motion.



A screenshot of a web form titled "Add Canned Motion of submission item." in a light blue box. The form includes a "Save Motion" button in the top right corner. Below the title, there are two input fields: "*Name:" followed by an empty text box, and "*Item Number:" followed by a text box containing the number "1". At the bottom left of the form, there is a link that says "Click here to edit/view the motion text" with a small document icon.

Enter the desired **Name** and **Item Number**. **Item Number** dictates the order in which canned motions appear on the Setup Canned Motion List page and in the Precanned Motion text dropdown list on the Vote tab of Submission processing screens.

Click the **Click here to edit/view the motion text** link to enter desired motion text.



A screenshot of the same "Add Canned Motion" form. The "*Name:" field is now filled with the text "Full Board Renewal Approved 1 Yr". The "*Item Number:" field is filled with the number "3". The link "Click here to edit/view the motion text" at the bottom left is highlighted with a red rectangular border.

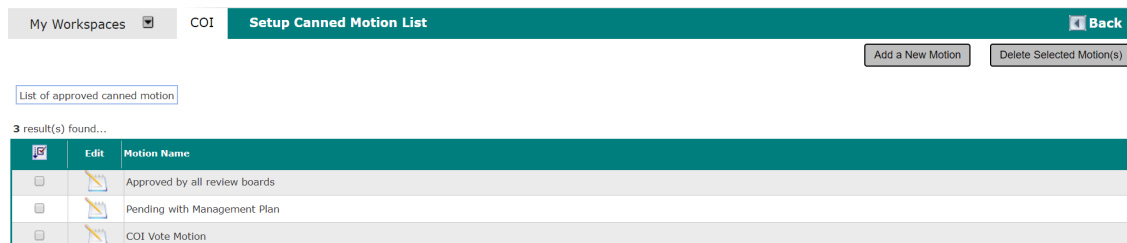
As shown below, a **Canned Motion text** page with a text editor for creation and formatting of the motion text opens.



A screenshot of the "Canned Motion text" editor interface. The top navigation bar shows "My Workspaces" with a dropdown arrow, "COI", and "COI - Canned Motion text" in a teal bar, with a "Back" button on the right. Below the navigation bar, the title "Canned Motion text" is displayed. The main area contains a rich text editor with a toolbar featuring icons for bold, italic, underline, strikethrough, subscript, superscript, font color, text color, bulleted list, numbered list, link, unlink, image, link icon, unlink icon, undo, and redo. The editor's content area contains the text "Motion for Approval of Conflict Match". A "Save" button is located in the top right corner of the editor area.

Enter desired motion text and apply any desired formatting, then click the **Save** button.

The text editor closes and the text is added to the add panel. Click the **Save Motion** button. As shown below, the motion is added on the **Setup Canned Motion List** page.

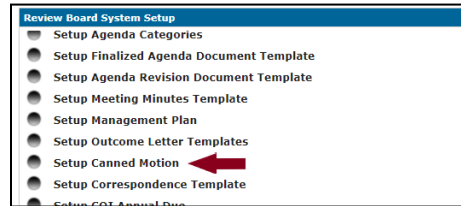


A screenshot of the "Setup Canned Motion List" page. The top navigation bar shows "My Workspaces" with a dropdown arrow, "COI", and "Setup Canned Motion List" in a teal bar, with a "Back" button on the right. Below the navigation bar, there are two buttons: "Add a New Motion" and "Delete Selected Motion(s)". Below these buttons, there is a link "List of approved canned motion". Underneath, it says "3 result(s) found...". A table with three columns is displayed: a checkbox, an "Edit" button with a pencil icon, and the "Motion Name".

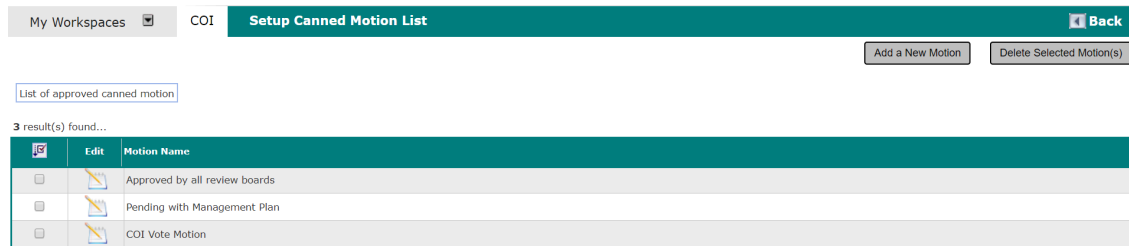
	Edit	Motion Name
<input type="checkbox"/>		Approved by all review boards
<input type="checkbox"/>		Pending with Management Plan
<input type="checkbox"/>		COI Vote Motion

Edit Canned Motion

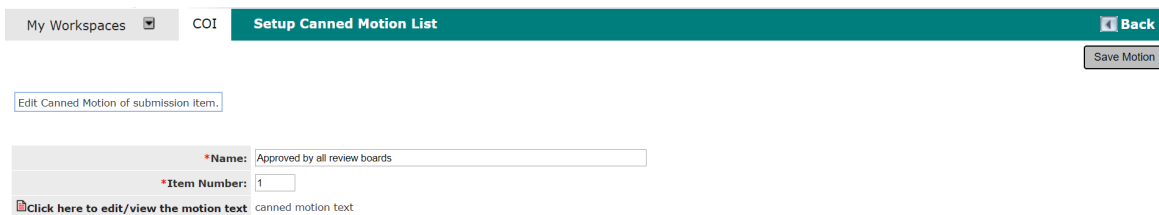
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



The **Setup Canned Motion List** page opens. Click the icon in the **Edit** column for the applicable motion.

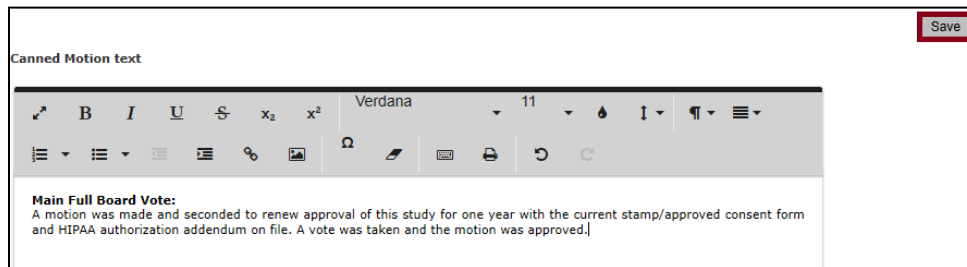


As shown below, an **Edit Canned Motion of submission item** panel opens for configuration of the motion.



Revise the **Name** and **Item Number** fields as desired. **Item Number** dictates the order in which canned motions appear on the Setup Canned Motion List page and in the Precanned Motion text dropdown list on the Vote tab of Submission processing screens.

Click the **Click here to edit/view the motion text** link to revise the motion text. As shown below, the motion is opened in a **Canned Motion text** page with a text editor for revision and formatting of the motion text.

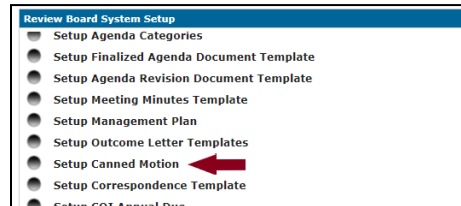


When changes are complete click the **Save** button. The text is added to the edit panel. Click the **Save Motion** button.

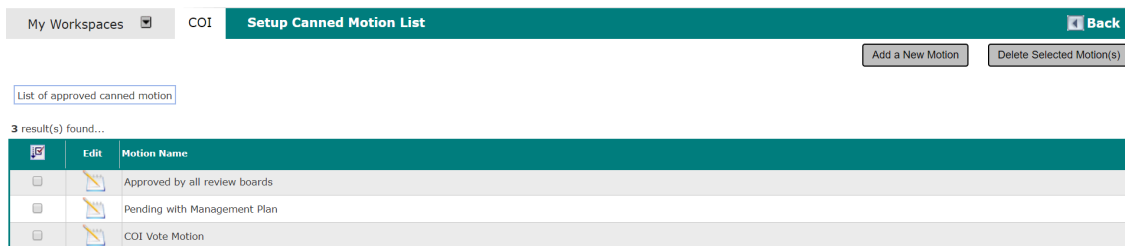
The motion is revised on the **Setup Canned Motion List** page.

Delete Canned Motion

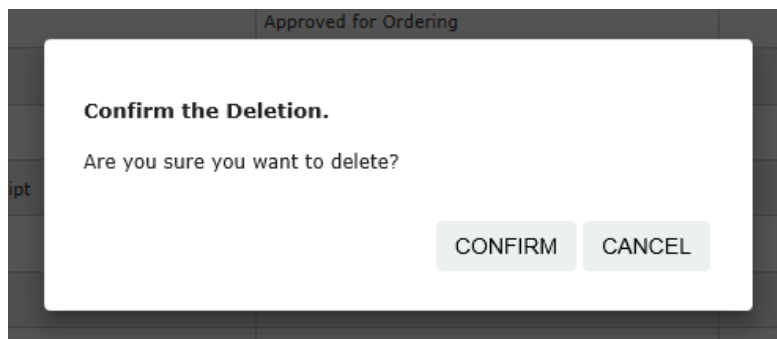
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



The **Setup Canned Motion List** page opens. Select the checkbox(es) in the far-left column for the motion(s) to be deleted, then click the **Delete Selected Motion(s)** button.



A confirmation popup window displays.



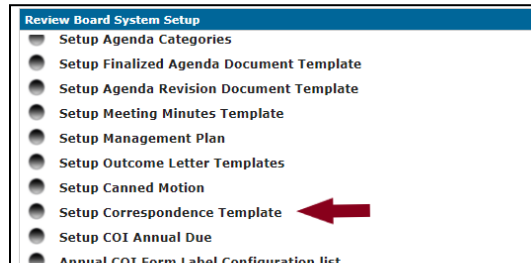
Click **CANCEL** to return to the **Setup Canned Motion List** page without deleting the motion(s).

Click **CONFIRM** to delete the motion(s) and return to the **Setup Canned Motion List** page. The motion(s) is(are) deleted.

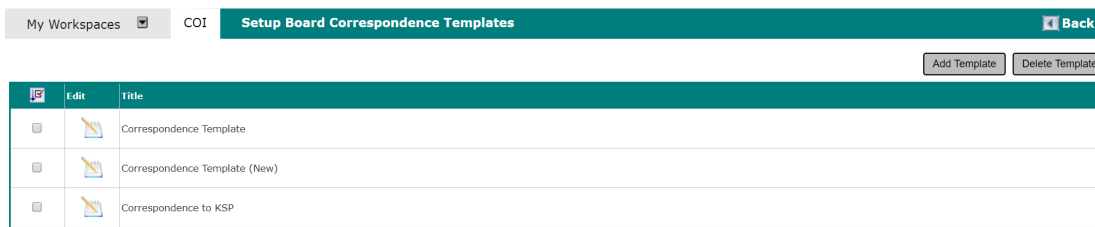
Setup Correspondence Templates

The iRIS™ system provides the ability to configure standardized correspondence templates that include commonly used boilerplate text and can automatically pull a variety of system data into the correspondence when it is generated.

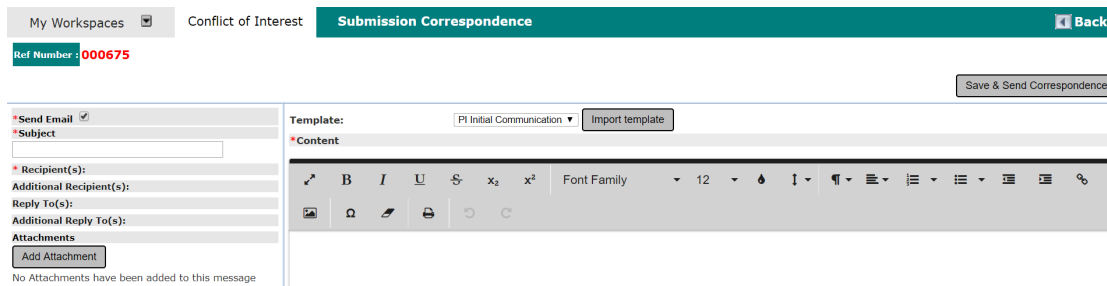
This functionality is provided on the **Setup Board Correspondence Templates** page. To access the page, click the **Setup Correspondence Template** link under Conflict of Interest Assistant > Review Board Administration > System Setup tab.



The **Setup Board Correspondence Templates** page opens, as shown below.



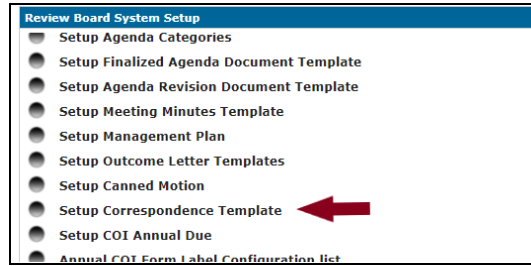
Correspondence Templates are used when creating a correspondence record for a Conflict Match in the Conflict Match processing screens. A drop down pick list of available templates is provided above the embedded text editor.



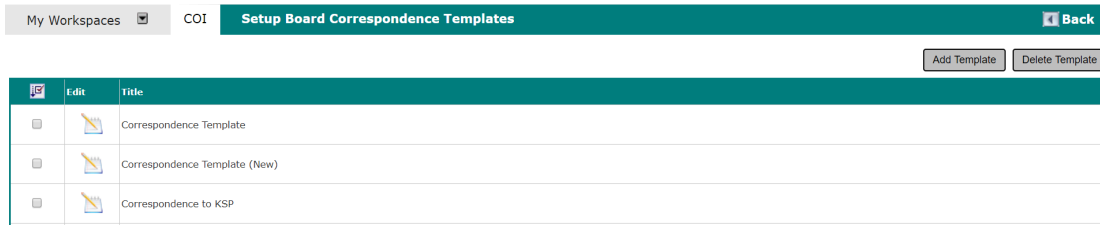
The desired template is selected from the drop down pick list and when the **Import template** button is clicked, the template's content is pulled into the text editor.

Add Correspondence Template

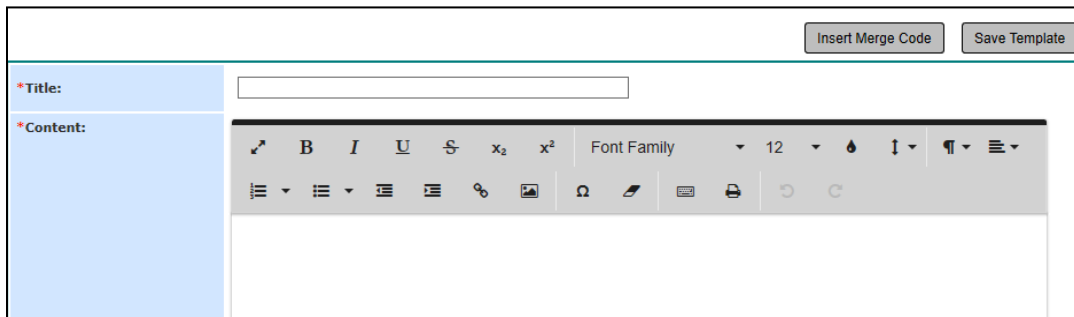
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



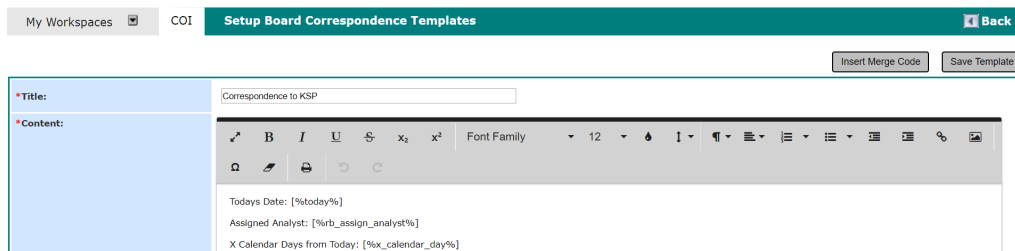
The **Setup Board Correspondence Templates** page opens, as shown below.



Click the **Add Template** button. As shown below, an add panel opens for creation of the correspondence.



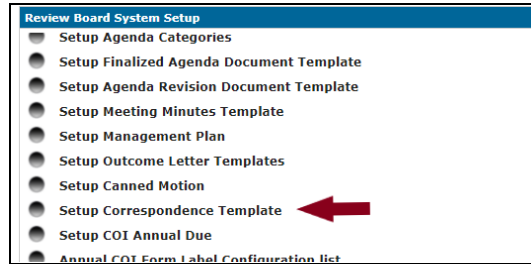
Enter desired text and Merge Codes in the main text editor window. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.



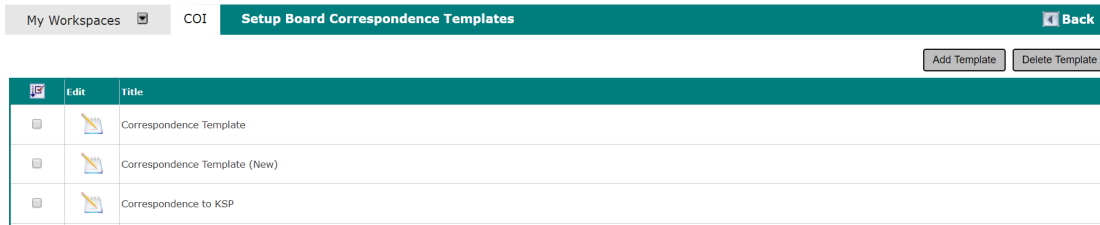
Apply any desired formatting, then click the **Save Template** button. The template is added on the **Setup Board Correspondence Templates** page.

Edit Correspondence Template

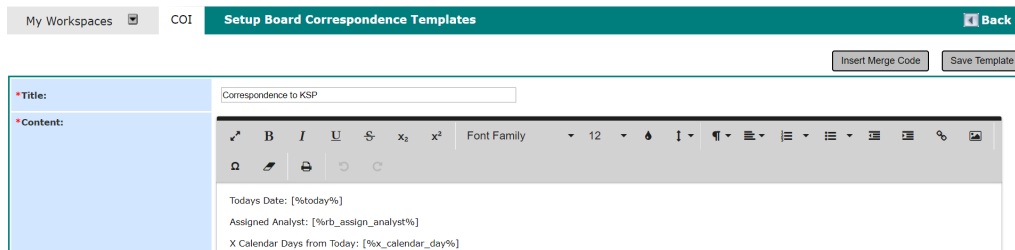
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



The **Setup Board Correspondence Templates** page opens, as shown below.



Click the icon in the **Edit** column for the applicable item. As shown below, the correspondence is opened in an edit panel. Make desired changes in the **Title** and **Content** fields.

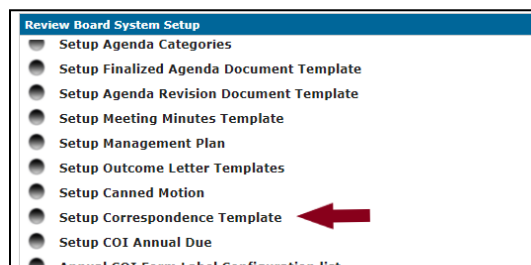


See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

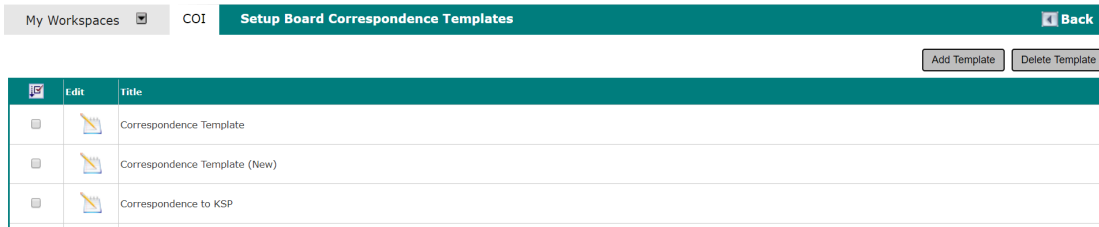
When all desired changes are complete, click the **Save Template** button. The template is revised on the **Setup Board Correspondence Templates** page.

Delete Correspondence Template

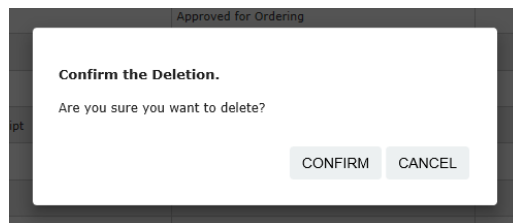
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



The **Setup Board Correspondence Templates** page opens. Select the checkbox(es) in the far-left column for the template(s) to be deleted, then click the **Delete Template** button.



A confirmation popup window displays.

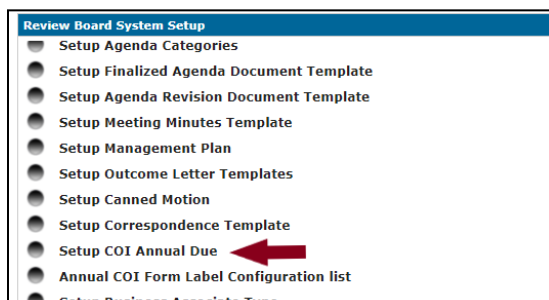


Click **CANCEL** to return to the **Setup Board Correspondence Templates** page without deleting the template(s).

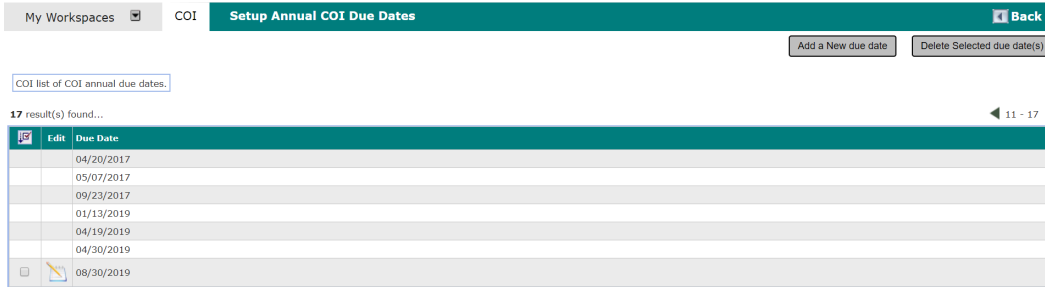
Click **CONFIRM** to delete the item(s) and return to the **Setup Board Correspondence Templates** page. The template(s) is(are) deleted.

Setup COI Annual Due

The iRIS™ system provides a **Setup Annual COI Due Dates** page for entry and tracking of each institution's due date for receiving the Annual COI Form from Covered Persons in the system. To access the page, navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup COI Annual Due** link.



The **Setup Annual COI Due Dates** page opens, as shown below.

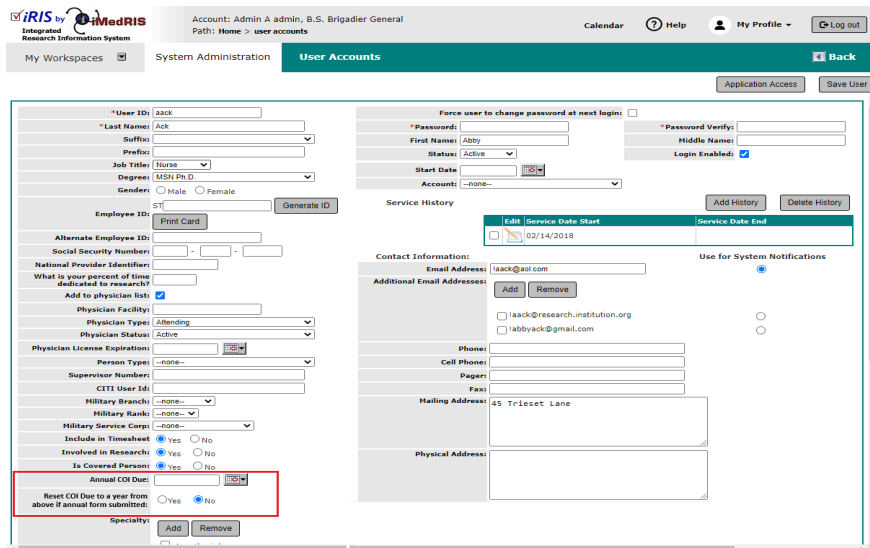


The page lists any annual COI due dates configured previously. Note that due dates in the past cannot be edited or deleted, and are retained for archive purposes. Future due dates can be modified or deleted.

Note that COI Due Date Notifications trigger based on the individual user’s assigned COI Due Date and NOT the Annual COI Due Date taken from the **Setup Annual COI Due Dates** page. The **Setup Annual COI Due Dates** page is provided to allow for simultaneous assignment of one due date to multiple Covered Persons.

Annual COI Due Field in the User Profile

Where the user is a Covered Person, **Annual COI Due** and **Reset COI Due to a year from above if annual form submitted** fields (red box in screenshot below) appear in the user profile under System Administration > User Accounts:



As shown in the screenshot above, the **Reset COI Due to a year from above if annual form submitted** field defaults to “No”. When this field is set to “Yes” the system performs the following check and possible update during overnight processing:

- If an annual COI form was submitted for the applicable user on the previous day, the system updates the **Annual COI Due** field for the applicable user to 365 days in the future

- If an annual COI form was not submitted for the applicable user on the previous day, the system makes no changes to the **Annual COI Due** field

If configured, the applicable user receives a task to complete a new annual COI form on the specified **Annual COI Due** date.

Preexisting users in the system automatically update to a future Annual COI Due Date when their existing Annual COI Due Date has passed. For example, if a user has a COI due date of 1/1/2020 and the next Annual COI Due Date in the system is scheduled for 1/1/2021, after 1/1/2020 has passed, the system updates the user account with the COI due date of 1/1/2021, in anticipation of the next year’s Annual COI Due Date.

New hires to the institution receive a separate Annual COI Due Date, set to five days after the new hire’s iRIS™ account is created. When that date passes the system updates the new hire’s account with the next upcoming Annual COI Due Date, as defined in the **Setup Annual COI Due Date** page.

Annual COI Due Column in Search Conflict Matches Page

The **Annual COI Due** field column on the **Search Conflict Matches** page (shown in screenshot below) is populated from the **Annual COI Due** field. This field is editable and any changes made to it post to the same column in the database whether revised in this location or the User Profile.

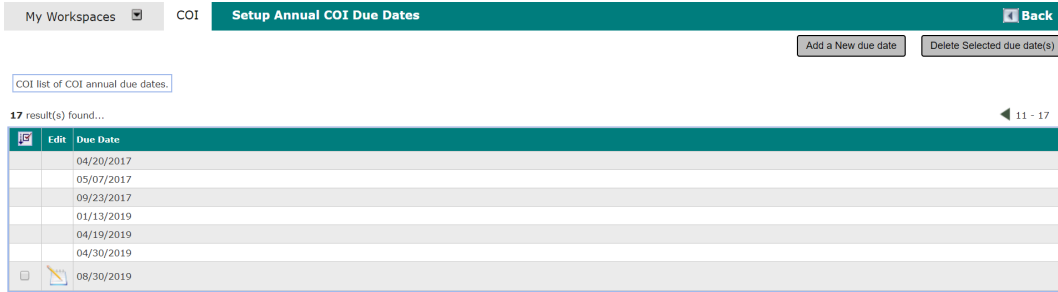
The screenshot shows the 'Search Conflict Matches' interface. At the top, there are search filters for 'Last Name', 'First Names', 'Employee ID', 'User ID', and 'Status'. Below these are checkboxes for 'Annual COI Lapsed', 'Annual COI Due in next 120 Days', 'No Annual COI Submitted', and 'By Outcome'. A 'Find' button is present. On the right, there are buttons for 'Download COI Due Date Template', 'Upload COI Due Date', 'Download Institutional Roles Template', and 'Upload Institutional Roles'. Below the search area, a table displays search results. The table has columns: 'Open User COI Profile', 'User Name', 'Primary Department', 'Annual COI Due', 'Manually Completed COI Filing Log', 'Status', 'COI Submission History', 'Internal Documents', 'Management Plan', and 'Conflict Matches'. One result is shown for 'McMurray, Sean' with a primary department of 'Admin - Redlands' and an 'Annual COI Due' date of '06/08/2019'. The 'Annual COI Due' cell is highlighted with a red box.

Add COI Annual Due

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup COI Annual Due** link.

The screenshot shows a 'Review Board System Setup' menu. The menu items are: 'Setup Agenda Categories', 'Setup Finalized Agenda Document Template', 'Setup Agenda Revision Document Template', 'Setup Meeting Minutes Template', 'Setup Management Plan', 'Setup Outcome Letter Templates', 'Setup Canned Motion', 'Setup Correspondence Template', 'Setup COI Annual Due', and 'Annual COI Form Label Configuration list'. A red arrow points to the 'Setup COI Annual Due' item.

The **Setup Annual COI Due Dates** page opens, as shown below.



Click the **Add a New due date** button. A panel opens for selection of the date from a calendar widget, as shown below.



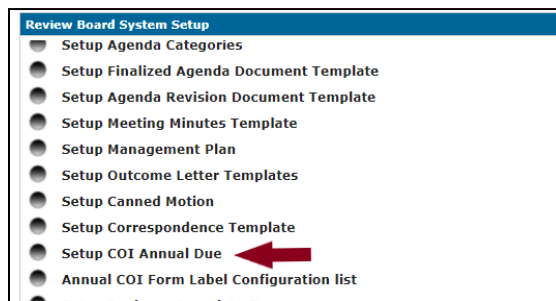
Click the calendar widget to open it. Navigate to the desired date and click to select it.

Click the **Save due date** button to close the add panel and save changes.

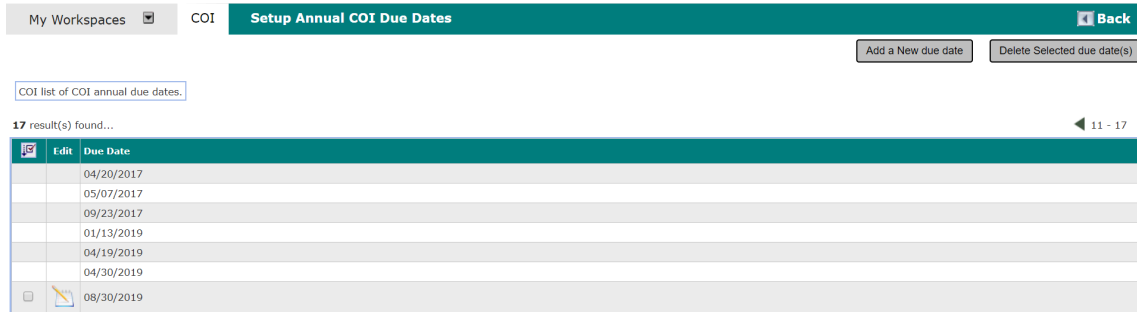
The date is added on the **Setup Annual COI Due Dates** page.

Edit Annual COI Due

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup COI Annual Due** link.



The **Setup Annual COI Due Dates** page opens, as shown below.



Click the icon in the **Edit** column for the applicable date. The selected date is opened in an edit panel, as demonstrated in the example below.



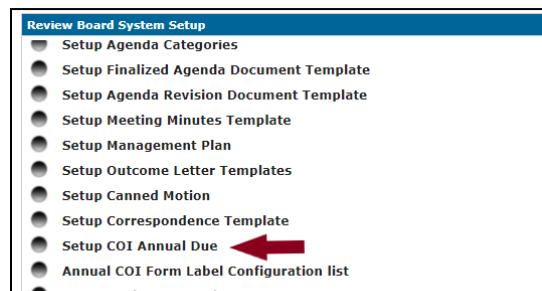
Click the calendar widget to open it. Navigate to the desired date and click to select it.

Click the **Save due date** button to close the edit panel and save changes.

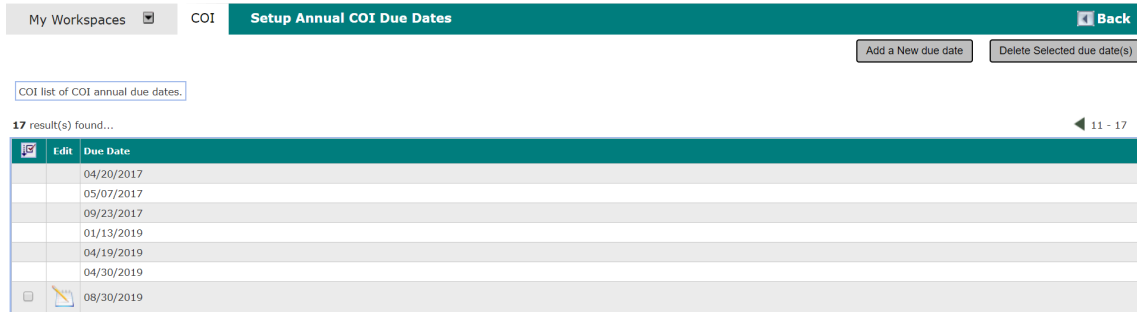
The item is revised on the **Setup Annual COI Due Dates** page.

Delete Annual COI Due

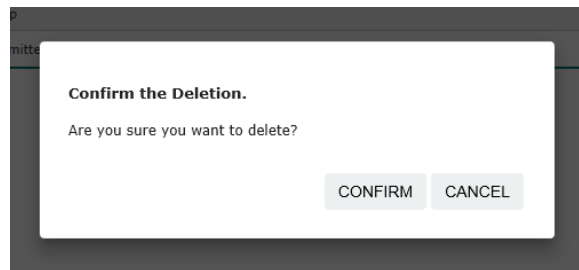
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup COI Annual Due** link.



The **Setup Annual COI Due Dates** page opens, as shown below.



Select the checkbox in the far-left column for the item to be deleted and click the **Delete Selected due date(s)** button. A confirmation popup displays.



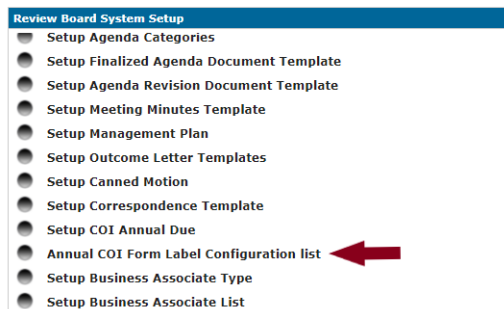
Click the **CANCEL** button to return to the **Setup Annual COI Due Dates** page without deleting the selected template(s).

Click the **CONFIRM** button to confirm the deletion and return to the **Setup Annual COI Due Dates** page.

The item is deleted on the **Setup Annual COI Due Dates** page.

Annual COI Form Label Configuration List

In iRIS™ systems where the Annual COI Form uses predefined data values, the **Setup COI Labels** page is used to configure label data values. To access the page, navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Annual COI Form Label Configuration list** link.



The Setup COI Labels page opens, as shown below. Each collection of COI labels is preceded by an identifying title in bold face text (red box in screenshot below).

List of Labels for Investment BioMedical

Edit	Predefined Name	Alternate Name	Description
	You just indicated that you or a Related Person have an investment interest(s) in a Biomedical third party. Complete a separate entry for every investment you or a Related Person have.	You just indicated that you or a Related Person have an investment interest(s) in a Biomedical third party. Complete a separate entry for every investment you or a Related Person have.	
	Who engaged in the activity?	Who engaged in the activity?	
	Provide the name of the Biomedical third party:	Provide the name of the Biomedical third party:	
	If Other, please enter the name of the Biomedical third party:	If Other, please enter the name of the Biomedical third party:	
	Select the estimated current value of the investment:	Select the estimated current value of the investment:	
	If > \$100,001, please specify the amount of the Investment:	If > \$100,001, please specify the amount of the Investment:	
	Select the current estimated ownership percentage:	Select the current estimated ownership percentage:	
	If > 5.0%, please specify your estimated percentage ownership:	If > 5.0%, please specify your estimated percentage ownership:	

Any of the predefined values listed in the **Setup COI Labels** page can be used in the Forms Designer when constructing an Annual COI Form.

List of Labels for Investment NonBioMedical

Edit	Predefined Name	Alternate Name	Description
	You just indicated that you or a Related Person have an investment interest(s) in a non-Biomedical third party. Complete a separate entry for every investment you or a Related Person have.	You just indicated that you or a Related Person have an investment interest(s) in a non-Biomedical third party. Complete a separate entry for every investment you or a Related Person have.	
	Who engaged in the activity?	Who engaged in the activity?	
	Provide the name of the non-Biomedical third party:	Provide the name of the non-Biomedical third party:	
	Select the estimated current value of the investment:	Select the estimated current value of the investment:	
	If > \$100,001, please specify the estimated current value of the investment:	If > \$100,001, please specify the estimated current value of the investment:	
	Select the current estimated ownership percentage:	Select the current estimated ownership percentage:	
	If > 5.0%, please specify the current estimated ownership percentage:	If > 5.0%, please specify the current estimated ownership percentage:	

To revise a label, click the icon in the **Edit** column for the applicable item. The label is opened in an edit panel, as shown below.

My Workspaces COI **Setup COI Labels** Back Save Label

Predefined Name:	Who engaged in the activity?
Alternate Name:	Persons participating in activity:
Description:	Personnel who are involved and might lead to another COI.

The original label is displayed in the **Predefined Name** field, which is read-only.

Make desired changes to the **Alternate Name** and **Description** fields.

Click the **Save Label** button to save changes and close the edit panel.

Edit	Predefined Name	Alternate Name	Description
	You just indicated that you or a Related Person have an investment interest(s) in a non-Biomedical third party. Complete a separate entry for every investment you or a Related Person have.	You just indicated that you or a Related Person have an investment interest(s) in a non-Biomedical third party. Complete a separate entry for every investment you or a Related Person have.	
	Who engaged in the activity?	Persons participating in activity:	Personnel who are involved and might lead to another COI.

The item is updated on the **Setup COI Labels** page, as shown above.

As shown below, any label change made in the **Setup COI Labels** page updates the corresponding data value in any Annual COI Form where the label is used.

Entry 1

Persons engaging in activity: You Related Person

Provide the name of the Biomedical third party:

Select the estimated current value of the

Setup Business Associate Type

The iRIS™ system provides tools for creation and maintenance of a **Business Associate List**, with business associates (sponsors) classified by **Business Associate Type**. A pick list of types is configured via the Setup Sponsor Type page. To access the page, navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Business Associate Type** link.

- Review Board System Setup
 - Setup Agenda Categories
 - Setup Finalized Agenda Document Template
 - Setup Agenda Revision Document Template
 - Setup Meeting Minutes Template
 - Setup Management Plan
 - Setup Outcome Letter Templates
 - Setup Canned Motion
 - Setup Correspondence Template
 - Setup COI Annual Due
 - Annual COI Form Label Configuration List
 - Setup Business Associate Type
 - Setup Business Associate List

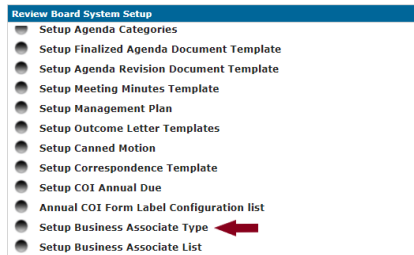
The **Setup Sponsor Type** page opens, as shown below.

13 result(s) found... 1 - 13

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		Department of Veterans Affairs	1	Yes	Use only Administrative Code 02
		Other United States Federal Government Agency	1	Yes	
		Private Proprietary Company	1	Yes	
		Voluntary Agency/Foundation	1	Yes	For Local Chapters of National Organizations, use Agency/Foundation code

Add Business Associate Type

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Business Associate Type** link.



The **Setup Sponsor Type** page opens, as shown below.

The screenshot shows the "Setup Sponsor Type" page with a table of 13 results. The table has columns for Delete, Edit, Sponsor Type, Sort Order Number, Include in Disclosure Search, and Description.

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		Department of Veterans Affairs	1	Yes	Use only Administrative Code 02
		Other United States Federal Government Agency	1	Yes	
		Private Proprietary Company	1	Yes	
		Voluntary Agency/Foundation	1	Yes	For Local Chapters of National Organizations, use Agency/Foundation code

Click the **Add a New Category** button. An add/edit panel opens for creation of the type, as shown below.

The screenshot shows the "Add a New Category" form. It includes fields for:

- * Sponsor Type: [text input]
- * Sort Order Number: 1 [text input]
- * Include Sponsors of this group in Disclosure Search: Yes No
- Description: [text area]

 There is a "Save Category" button at the top right.

Complete the form as follows:

Sponsor Type – enter the desired display name for the Sponsor Type record

Sort Order Number – enter the desired order number for sorting, duplicates are allowed; if more than one type is assigned to the same **Sort Order Number**, a secondary sort in alphabetical order is applied

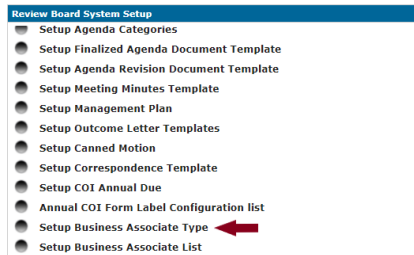
Include Sponsors of this group in Disclosure Search – select “Yes” to include sponsors of this type in the conflict of interest match processing check; if this flag is set to “Yes”, when a Covered Person submits an Annual COI Form containing a conflict match with a sponsor of this type, the system flags a COI match and reports it to the Conflict of Interest board

Description – enter any desired description for the type

Click **Save Category** to close the add panel and save the **Sponsor Type**.

Edit Business Associate Type

Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Business Associate Type** link.



The **Setup Sponsor Type** page opens, as shown below.

The screenshot shows the "Setup Sponsor Type" page. At the top, there is a breadcrumb "My Workspaces > COI" and a "Setup Sponsor Type" header with a "Back" button. Below the header is a table with 13 results. The table has columns: Delete, Edit, Sponsor Type, Sort Order Number, Include in Disclosure Search, and Description.

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		Department of Veterans Affairs	1	Yes	Use only Administrative Code 02
		Other United States Federal Government Agency	1	Yes	
		Private Proprietary Company	1	Yes	
		Voluntary Agency/Foundation	1	Yes	For Local Chapters of National Organizations, use Agency/Foundation code

Click the icon in the **Edit** column for the applicable type. The selected type is opened for revision in an add/edit panel, as shown below (blank example).

The screenshot shows the add/edit panel for a "Sponsor Type" record. It includes a "Save Category" button at the top right. The form fields are: "Sponsor Type:" (text input), "Sort Order Number:" (text input with value "1"), "Include Sponsors of this group in Disclosure Search:" (radio buttons for Yes and No, with Yes selected), and "Description:" (text area).

Make desired revisions to the fields as follows:

Sponsor Type – enter the desired display name for the Sponsor Type record

Sort Order Number – enter the desired order number for sorting, duplicates are allowed; if more than one type is assigned to the same **Sort Order Number**, a secondary sort in alphabetical order is applied

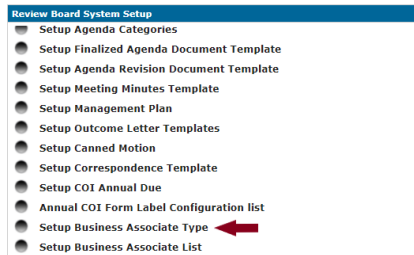
Include Sponsors of this group in Disclosure Search – select “Yes” to include sponsors of this type in the conflict of interest match processing check; if this flag is set to “Yes”, when a Covered Person submits an Annual COI Form containing a conflict match with a sponsor of this type, the system flags a COI match and reports it to the Conflict of Interest board

Description – enter any desired description for the type

Click **Save Category** to close the add/edit panel and save changes.

Delete Business Associate Type

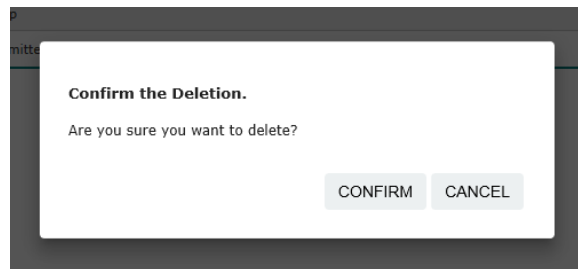
Navigate to Conflict of Interest Assistant > Review Board Administration > System Setup tab > **Setup Business Associate Type** link.



The **Setup Sponsor Type** page opens, as shown below.

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		Department of Veterans Affairs	1	Yes	Use only Administrative Code 02
		Other United States Federal Government Agency	1	Yes	
		Private Proprietary Company	1	Yes	
		Voluntary Agency/Foundation	1	Yes	For Local Chapters of National Organizations, use Agency/Foundation code

Click the icon in the **Delete** column for the applicable type. A confirmation popup displays.



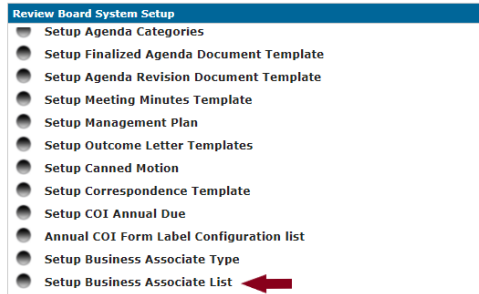
Click the **CANCEL** button to return to the **Setup Sponsor Type** page without deleting the selected template(s).

Click the **CONFIRM** button to confirm the deletion and return to the **Setup Sponsor Type** page.

The item is deleted on the **Setup Sponsor Type** page.

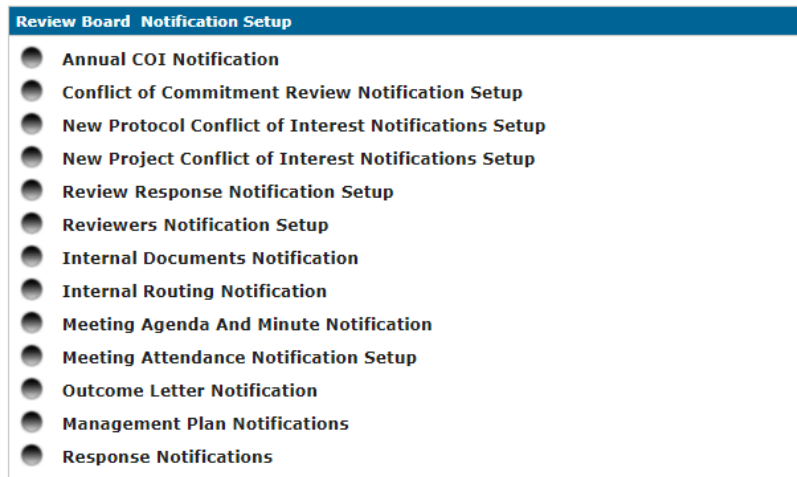
Setup Business Associate List

The iRIS™ system provides tools for creation and maintenance of a **Business Associate List**, with business associates classified by **Business Associate Type**. For more information, see the Conflict of Interest — Business Associate List manual.



Setup Notifications

The iRIS™ system provides tools for creation of editable, boilerplate Review Board Administration and system notifications. For more information about any of the functions shown in the **Review Board Notification Setup** menu (screenshot below), see the Conflict of Interest — Review Board Administration Notifications manual.



List Maintenance Setup Tab

The **List Maintenance Setup** tab under Conflict of Interest > Review Board Administration (screenshot below) contains a list of configurable dropdown lists for use in iRIS™.

My Workspaces ▾ Conflict of Interest **Board Administration** [Back](#)

[Download Board Configurations](#) [Upload Board Configurations ...](#) [Copy Selected Configurations](#)

System Setup | **List Maintenance Setup**

Review Board Lists

- Internal Document Category
- Internal Routing User Roles
- Predefined Strategies
- Review Outcome/Outcome Configuration List
- Reviewer Rank Configuration List
- Setup Review Board Strategy Actions
- Setup Institutional Role Name List

Review Board

- Configure Nature of Activity list
- Configure Business Type list
- Configure Dollar Amount Selection list
- Configure Percent Ownership Selection list
- Configure Compensated Biomedical Service list
- Configure Compensated Non-Biomedical Service list
- Configure UnCompensated Biomedical Service list
- Configure UnCompensated Non-Biomedical Service list
- Configure Intellectual Property list
- Configure Gift Type list
- Configure Gift Amount list
- Configure Related Person list
- Configure Family Member list
- Configure Study Financial Interest list
- Configure Study Associational Interest list
- Configure Study Intellectual Property Interest list
- Configure Study Associational Activity list
- Configure Location list
- Issue Reporting Types

For more information about any of the functions shown in the **List Maintenance Setup** tab, see the Conflict of Interest — List Maintenance manual.