



## IACUC ASSISTANT

---

*Review Board Administration*

Version 10.03.02

## Contents

Introduction.....	5
System Setup.....	5
Copy Configurations.....	6
Board Definition.....	8
Board Configuration Options.....	9
Broadcast Notice.....	9
Setup Committee List.....	12
Setup Review Board Roles.....	13
Setup Role Access.....	15
Setup Electronic Document Stamp.....	17
Setup Study Numbering.....	20
Setup Agenda Categories.....	21
Setup Finalized Agenda Document Template.....	26
Validate MergeCode Formatting.....	30
Setup Agenda Revision Document Template.....	31
Setup Expedite Report Template.....	35
Setup Meeting Minutes Template.....	37
Setup Outcome Letter Groups.....	40
Setup Outcome Letter Templates.....	43
Setup Canned Motion.....	44
Setup Template Language.....	46
Setup Correspondence Templates.....	48
Setup Review Cycle.....	50
Available to Purge.....	51
Review Board Notification Setup.....	52
Submission Notification Setup.....	54
Submission Types.....	54
Response Pending Notification.....	55
Continuing Review Notification Setup.....	55
Expiring Study Notification.....	55
Renewal Notification.....	55

Board Members Notification Setup.....	55
Reviewers Notification Setup.....	57
Reviewers Complete Notification.....	57
Reviewer Assignment Notifications.....	57
Internal Routing Notification.....	58
Internal Routing Assignment Notification.....	58
Internal Routing Complete Notification.....	58
Pre Review Assignment Notification.....	59
Pre Review Agenda Assignment Notifications.....	59
Pre Review Expedited, Exempt, and Administrative Notifications.....	59
Pre Review Denied Notification.....	59
Meeting Agenda and Minute Notification.....	59
Final Meeting Agenda Notification.....	60
Revised Meeting Agenda Notification.....	60
Final Meeting Minute Notification.....	60
Draft Meeting Minute Notification.....	60
Meeting Attendance Notification.....	60
Meeting Attendance Notifications.....	61
Member Attendance Change Notification.....	61
Designated Review to be placed on the Agenda Notification.....	61
Outcome Letter Notification.....	62
Outcome Letter Notification.....	62
Outcome Signoff Letter Notification.....	62
Outcome Signoff Complete Notification.....	62
Outstanding Stipulations Notification.....	62
Internal Documents Notification.....	63
List Maintenance Setup.....	64
Animal Species Configuration List.....	64
Merge Species.....	65
Adding Species to the Master List.....	66
Functionality.....	66
Animal Species Category Configuration List.....	67

Animal Species Sex Configuration List.....	68
Animal Procedure Type Configuration List.....	69
Animal Procedure Configuration List.....	70
Animal Service Type Configuration List.....	73
Animal Service Configuration List.....	74
Animal Study Type Configuration List.....	75
Anesthetic Configuration List.....	76
Analgesia Configuration List.....	78
Stipulation Category.....	80
Device Configuration List.....	81
Add a New Device.....	81
Download/Upload Device.....	82
Merge Device Records.....	82
Restraint Device Configuration List.....	84
Add a New Restraint Device.....	84
Merge Restraint Device Records.....	85
Restraint Device Functionality.....	86
Drug Configuration List.....	86
Add a New Drug.....	87
Download/Upload Drug.....	87
Merge Drug Records.....	88
Drug Functionality.....	89
Euthanasia Method Configuration List.....	90
Fluid Extract Configuration List.....	92
Internal Document Category.....	94
Internal Routing User Roles.....	95
Member Specialty Configuration List.....	96
Paralyzing Agent Configuration List.....	97
Predefined Stipulations.....	100
Review Outcome/Outcome Configuration List.....	101
Reviewer Rank Configuration List.....	103
Setup Review Board Stipulation Actions.....	104

Setup Training Courses..... 105

Business Associate List.....106

Sponsor Type..... 109

Study Document Outcome/Outcome Configuration List..... 110

Study Status Configuration List..... 112

Substance Configuration List..... 117

Strain Configuration List..... 119

IACUC Drug Configuration List..... 120

    Add a New IACUC Drug..... 121

    Merge IACUC Drug Records..... 121

    IACUC Drug Functionality..... 122

Tranquilizing Drug Configuration List..... 123

USDA Class Configuration List..... 125

Vaccination Configuration List..... 127

Issue Reporting Types..... 127

Clean-up..... 129

    Transfer Outstanding Tasks..... 129

    Document Management..... 129

# IACUC Assistant - Review Board Administration

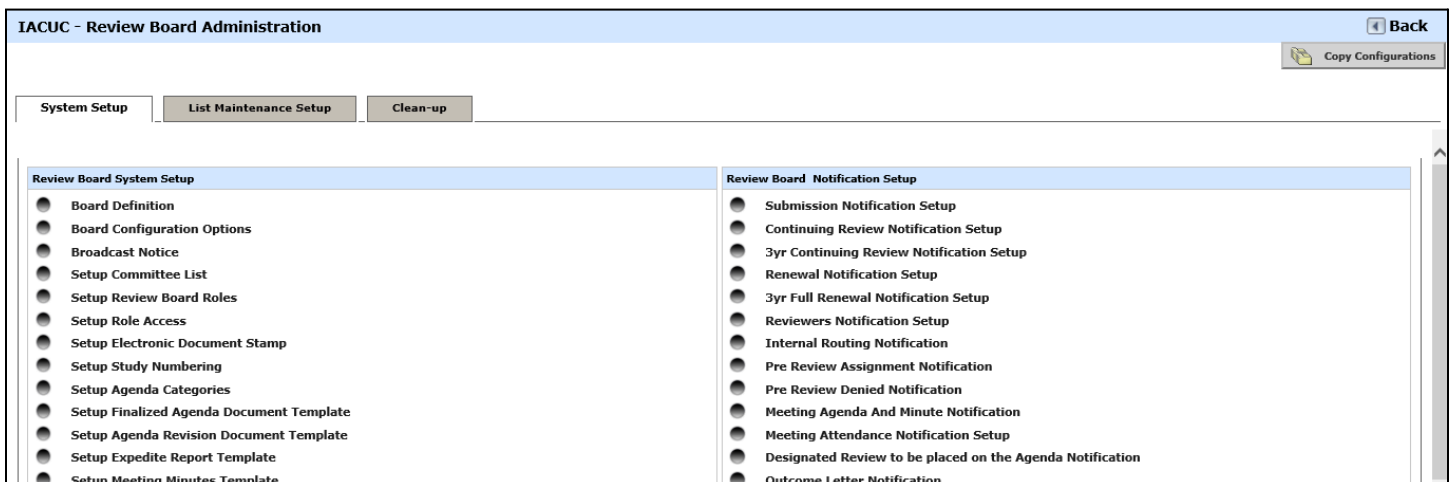
## Introduction

Within IACUC Review Board Administration you can set up configuration lists, define Outcome Letters, define Meeting Agenda and Minutes templates, and setup automatic review board related notifications. Due to this high level of control, the Review Board Administration section of the IACUC Assistant module is typically reserved for Review Board Administrators.



## System Setup

The first section of Review Board Administration is the System Setup tab. This section allows review board administrators to manage the general setup for the IACUC Assistant module. As a Review Board Administrator, you can define review board details, setup review board roles, and define board member access in iRIS. You can also create the templates for Outcome Letters, Minutes, and Agendas, as well as set up system-generated notices that will send to study or board users based on certain events in the system.

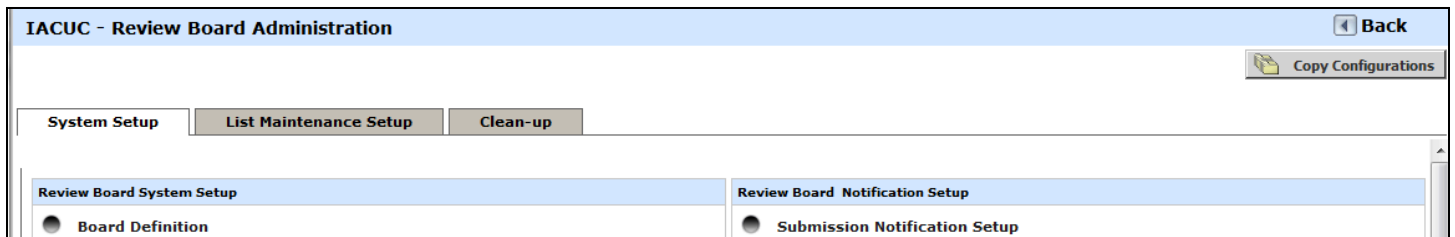


## Copy Configurations

Note: This is a tool designed to help with the initial setup of iRIS. It is not recommended that this be used once your review boards are set up or once your system is live. This also must be used in conjunction with other IACUC review board modules. Configurations cannot be copied from review boards that are different types (IRB to IBC, IRB to IACUC) but can only be copied to review boards that are the same type (IRB to IRB, IBC to IBC, IACUC to IACUC).

If you have two review boards that have similar configurations, you can copy configurations that are set in one review board to another review board of the same type.

Click on the **Copy Configurations** button to get started.

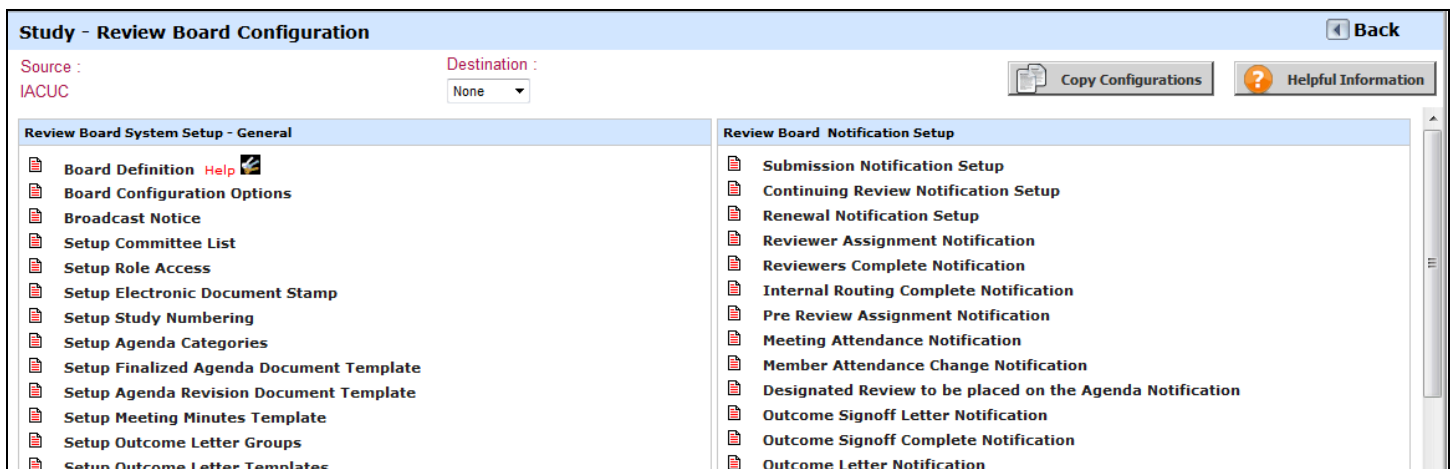


A new screen will open, displaying the available configurations that can be copied to the other review board.

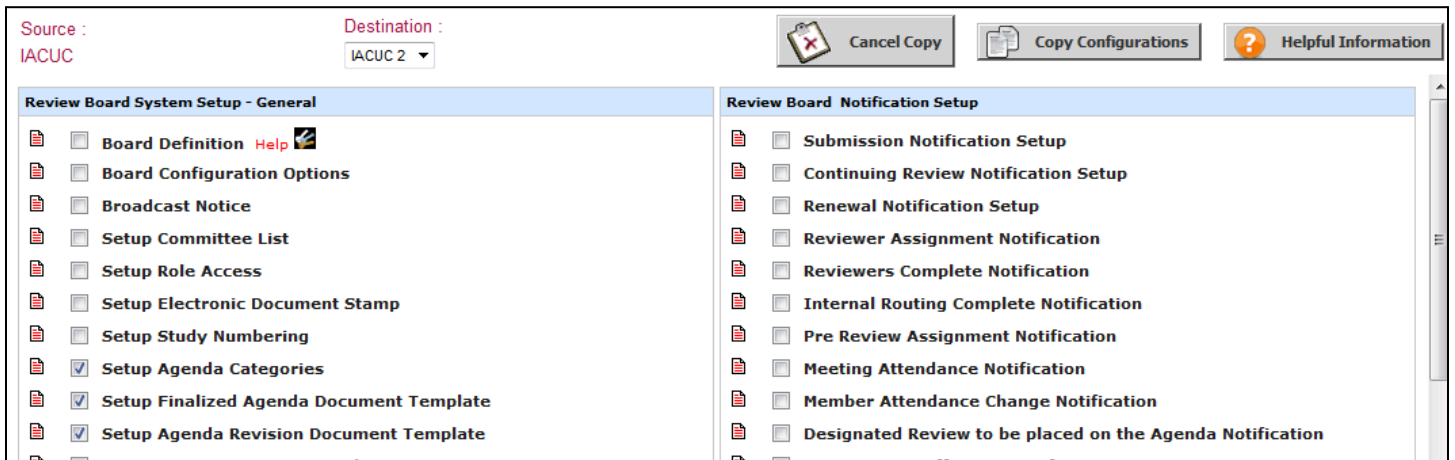
At the top of the page, the source is listed. This is the review board you are currently working in. You will need to select a Destination review board. Only review boards of the same type will populate in the Destination drop down list. When a destination is selected, checkboxes will populate next to each configuration option.

\*Note: certain configurations of the IACUC cannot be copied:

- Board Definition
- Setup Review Board Roles
- Role Access
- Setup Correspondence Template
- Review Cycle
- Study Status Configuration List

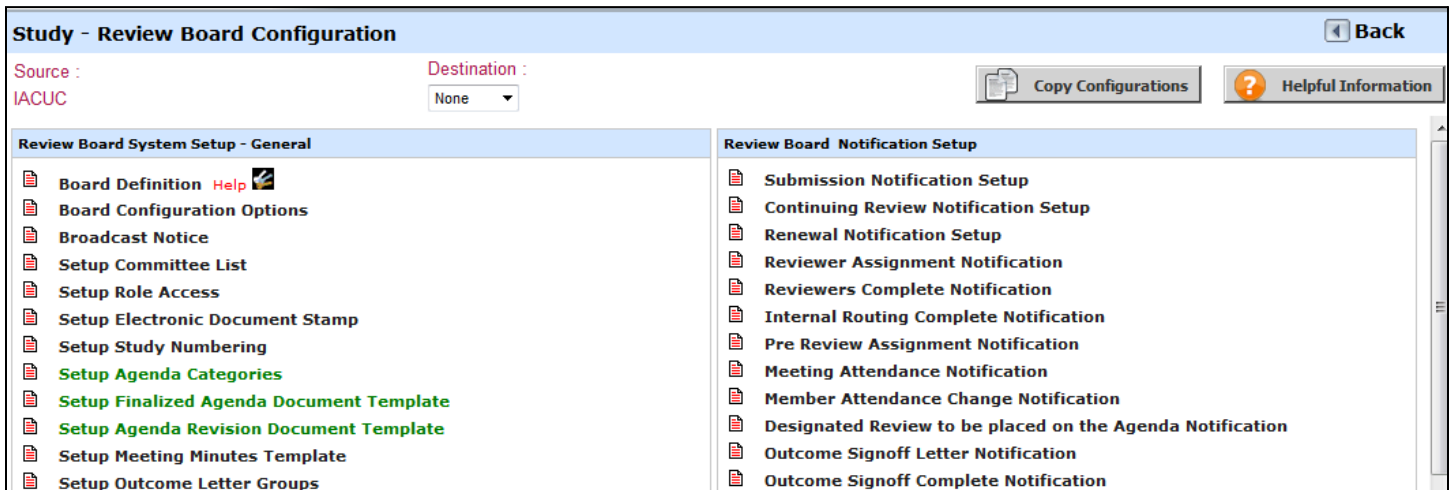


Select the checkbox next to the configuration items that you would like to copy to the other review board. If you do not wish to proceed, click the **Cancel Copy** button to return to the Review Board Administration list. To proceed with the copy, click the **Copy Configuration** button.



The screen will refresh and update. Any item successfully copied will turn green, and items that did not copy successfully will turn red. An item may not copy over if there is no data in the first place or if that field is not turned on in the destination review board.

Note: when performing a copy from one board to another, if any field is populated in the destination board, it will be overwritten.



Good practice for successful copying is to have each item in the source review board completely configured and ready to copy so you only copy one time. iMedRIS recommends only performing the copy one time to the destination review board.

Source : IACUC Destination : IACUC 2

Cancel Copy Copy Configurations Helpful Information

Review Board System Setup - General	Review Board Notification Setup
<input type="checkbox"/> Board Definition <a href="#">Help</a>	<input type="checkbox"/> Submission Notification Setup
<input type="checkbox"/> Board Configuration Options	<input type="checkbox"/> Continuing Review Notification Setup
<input type="checkbox"/> Broadcast Notice	<input type="checkbox"/> Renewal Notification Setup
<input type="checkbox"/> Setup Committee List	<input type="checkbox"/> Reviewer Assignment Notification
<input type="checkbox"/> Setup Role Access	<input type="checkbox"/> Reviewers Complete Notification
<input type="checkbox"/> Setup Electronic Document Stamp	<input type="checkbox"/> Internal Routing Complete Notification
<input type="checkbox"/> Setup Study Numbering	<input type="checkbox"/> Pre Review Assignment Notification
<input checked="" type="checkbox"/> Setup Agenda Categories	<input type="checkbox"/> Meeting Attendance Notification
<input checked="" type="checkbox"/> Setup Finalized Agenda Document Template	<input type="checkbox"/> Member Attendance Change Notification
<input checked="" type="checkbox"/> Setup Agenda Revision Document Template	<input type="checkbox"/> Designated Review to be placed on the Agenda Notification

## Board Definition

The first item in the Review Board System Setup list is the Board Definition.

This page allows you to specify details regarding the review board. There are two required information fields: **Review Board Name** and **Review Board Type**. The **Review Board Type** is a list of predefined board types as specified in your contract with iMedRIS Data Corporation. For more information on the different types of available review boards, please contact iMedRIS. This list will be grayed out on this page, as the review board type has already been defined.

You can enter or edit information about the Assurance Number and Assurance Expiration, any Comments, and contact information for the review board. After updating or changing this information, click the **Save Definition** button on the top right of the page.

**IACUC - Review Board Definition** Back

[Save Definition](#)

\*Review Board Name:

\*Review Board Type:

Assurance Number:

Assurance Expiration:

Comments:

**Primary Address:**

Street:

City:

State:

Zip/Postal Code:

Country:

**Primary Phone:**

Phone Number:

**Primary E-mail:**

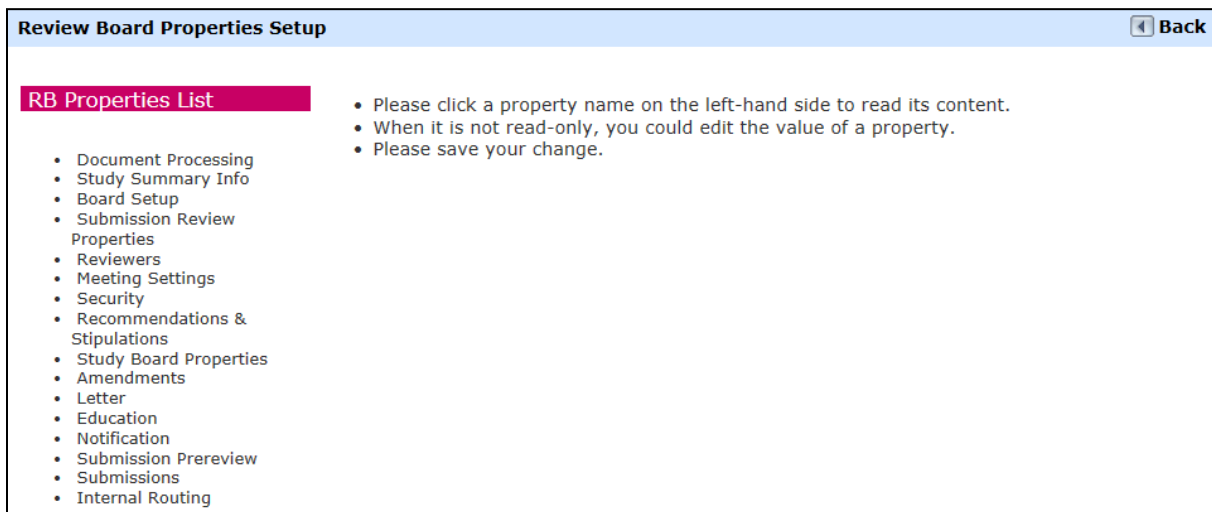
E-mail:

## Board Configuration Options

This page lists some of the features that you can set within the Review Board. Before changing these properties it is a good idea to have a working knowledge of your system and of any potential changes. It is also good to verify changes with iMedRIS personnel before applying them to a live system.

The properties are divided into categories and these categories are displayed on the left panel of the screen. To view the properties in a category, click the category in the left panel, and all the properties related to that category will display. The 'Yes' and 'No' radio buttons indicate that the properties are on/off. Any other value indicates that the property is a variable.

Please see the IACUC Properties manual for specific information related to each property.



**Review Board Properties Setup** Back

**RB Properties List**

- Document Processing
- Study Summary Info
- Board Setup
- Submission Review Properties
- Reviewers
- Meeting Settings
- Security
- Recommendations & Stipulations
- Study Board Properties
- Amendments
- Letter
- Education
- Notification
- Submission Prereview
- Submissions
- Internal Routing

- Please click a property name on the left-hand side to read its content.
- When it is not read-only, you could edit the value of a property.
- Please save your change.

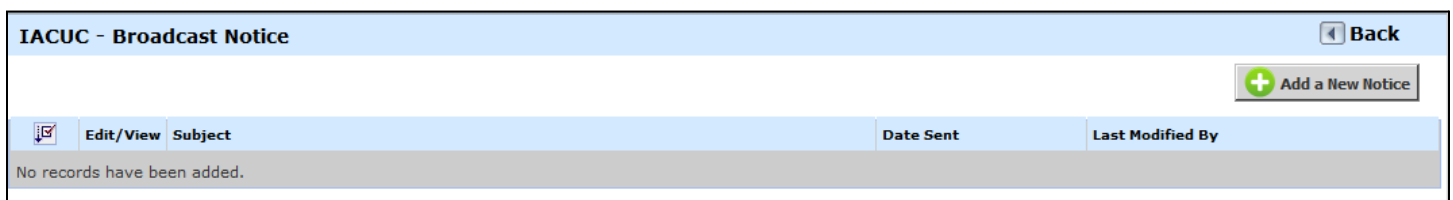
You can use the **Download Properties Script** button to download a .sql script containing the configurations for the review board properties, which can be used to import the configurations into another iRIS system.

## Broadcast Notice

Broadcast Notice is a tool that will allow you to send an email to review board members and users associated to the review board (users on studies that are associated to the review board). Use this tool from within the review board to send out alerts and messages that pertain to this group of users. There is another Broadcast Notice that can be set up and sent from System Administration, however, this will send to all users in iRIS.

When you open the Broadcast Notice page, the system will display any broadcasts previously set up/sent out. The first time you open this page, the page will be empty.

Click on the **Add a New Notice** button.



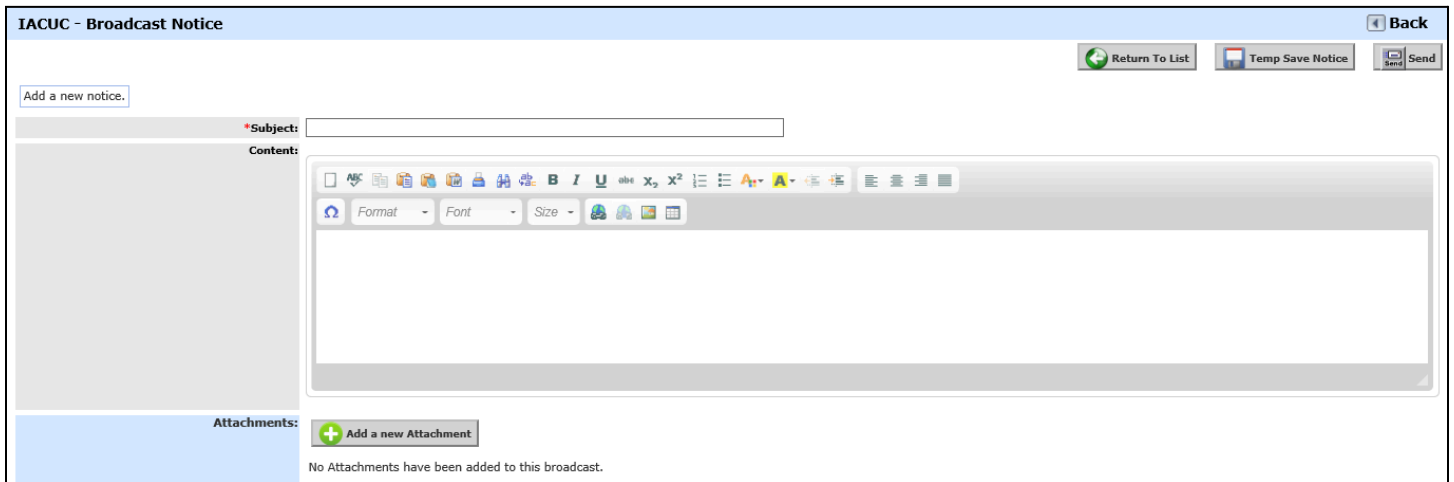
**IACUC - Broadcast Notice** Back

[+ Add a New Notice](#)

<input type="checkbox"/>	Edit/View	Subject	Date Sent	Last Modified By
No records have been added.				

A new page will open, allowing you to provide a Subject for the notice, enter the Content, and attach any documents, if necessary.

Click on the **Return to List** button to cancel and return to the list of broadcast notices.



IACUC - Broadcast Notice

Return To List Temp Save Notice Send

Add a new notice.

\*Subject:

Content:

Attachments: [+ Add a new Attachment](#)

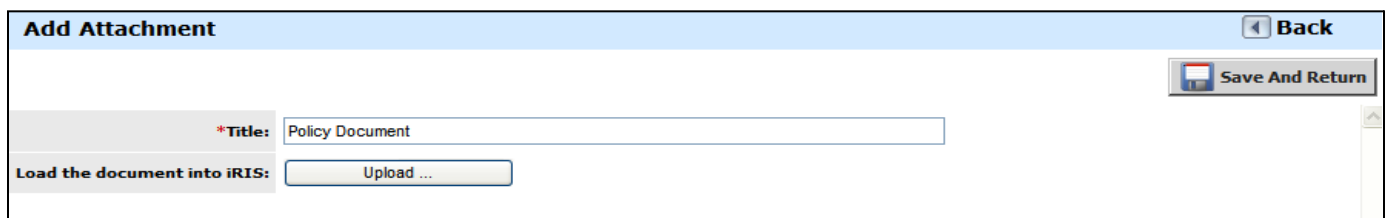
No Attachments have been added to this broadcast.

If you have started the broadcast notice but are not ready to send it as an email yet, you can save the notice without sending by clicking on the **Temp Save Notice** button. Doing this will save the notice and return you to the list of broadcast notices. You can return to the notice by locating it in the list of notices and then clicking on the **Edit/View** icon.

Within the detail of the notice, only the Subject line is required. This is so that you can temporarily save your notice without any detail provided in the Content section. You can type in the Content, or copy and paste.

If you need to attach a document to the notice, click on the **Add a new Attachment** button.

A new page will open. Enter the Title of the document and click the **Upload** button to search your computer for the document you wish to upload.



Add Attachment

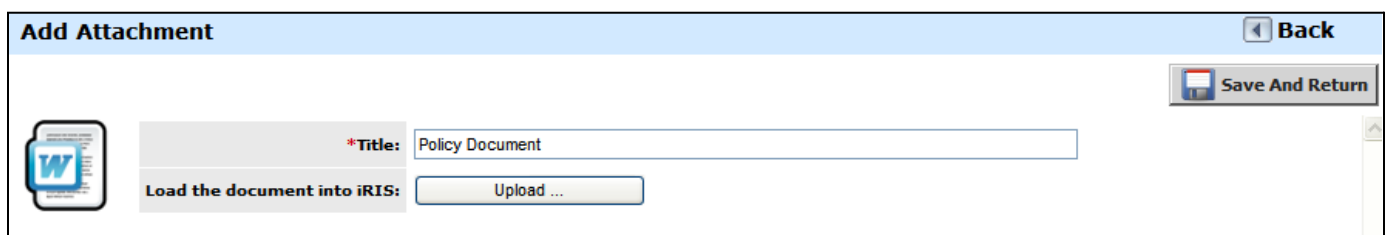
Back

Save And Return

\*Title: Policy Document

Load the document into iRIS: Upload ...


Once you upload a document, the page will refresh and display an icon to the left of the Title. Click the **Save and Return** button to associate the document to the notice.



Add Attachment

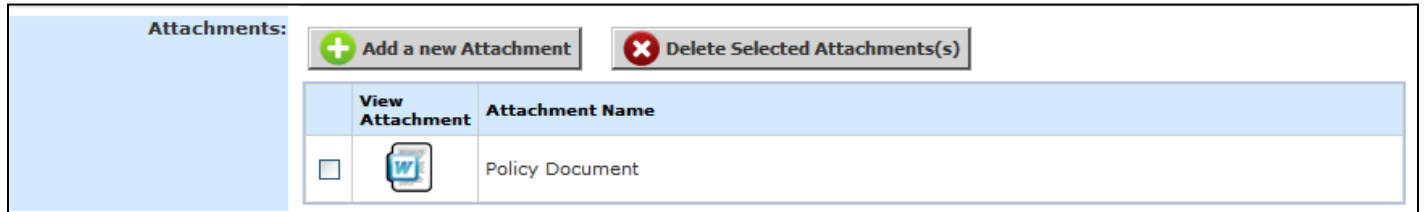
Back

Save And Return

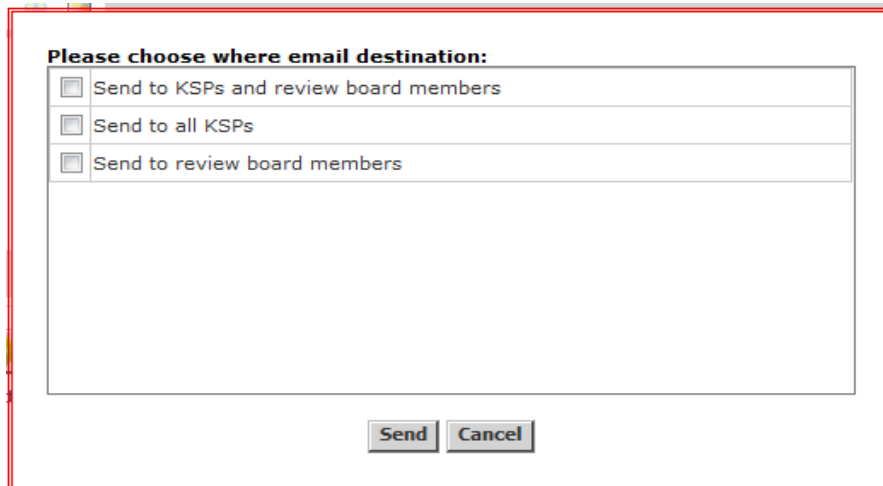
Load the document into iRIS:  \*Title: Policy Document

Upload ...

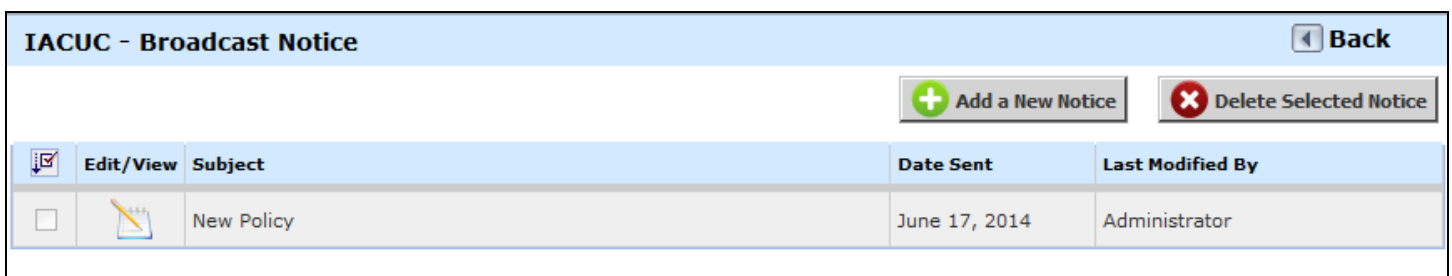
The associated document will display in a table in the Attachments area. You can add multiple attachments to the broadcast; however, your email server may have a restriction on the max file size for documents attached to outgoing emails. You may want to check with your email administrator on any limitations before sending large documents through the broadcast. You can remove an associated document by selecting the checkbox next to the document and then click the **Delete Selected Attachment(s)** button.



Once you have defined the Subject, entered Content, associated any necessary documents, and are ready to send the broadcast notice, click on the **Send** button. A small popup window will open, allowing you to choose the recipients of the broadcast notice. \*Note, when you click **Send**, and the popup displays, iRIS defaults the first selection, "Send to KSPs and review board members". To change the recipients of the email, uncheck this option, and the two other options will display. Make your selection and click **Send** within the popup window, or click **Cancel** to exit without sending.



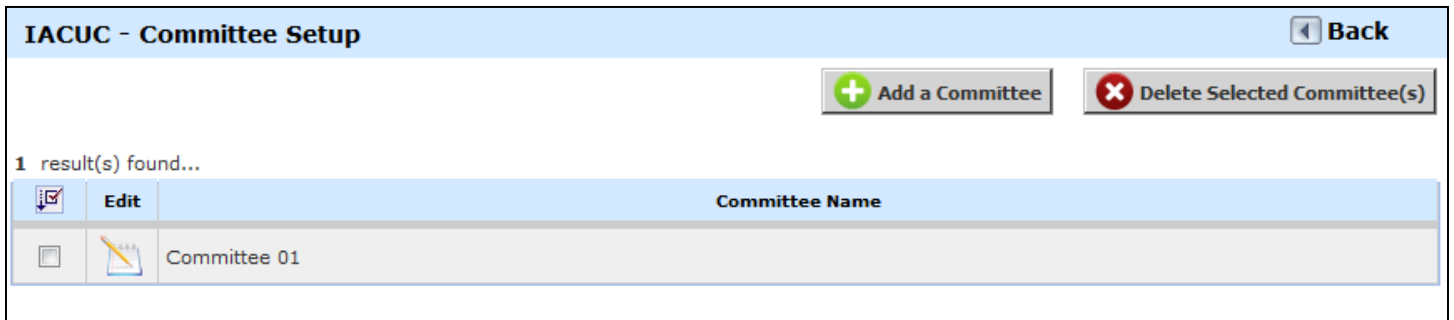
You will then be returned to the list of broadcast notices. Your broadcast notice will populate in the list. The Date Sent column will update with the date you sent the notice. You can view the notice to see the content, but you will not be able to edit or delete sent notices. You are only able to edit/delete notices that have not been sent out.



## Setup Committee List

Committee Setup lists the current committees for the review board. From the committee setup list page you can add new committees and edit/delete existing committees.

Opening the Committee List page will display a list of current committees in your review board. This is a list of the committees only. Access to committees is defined in a user's account. Once a committee is set up, you will be able to associate users to the committee through user access in the system.

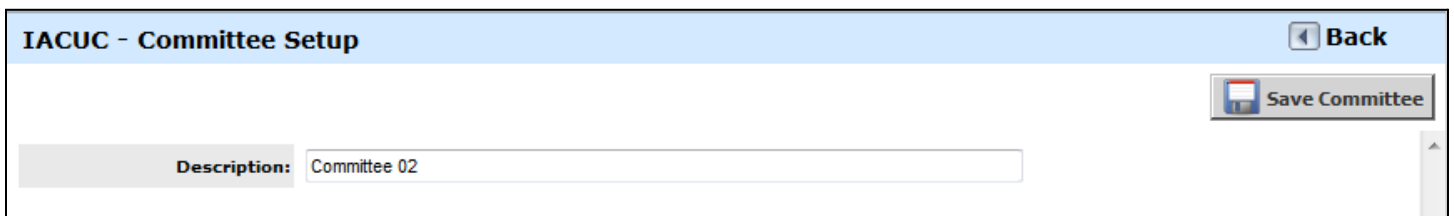


If your review board is set up for Committee Submissions (property `rb.use_submission_by_committee` set to "Yes"), the system will be setup to route submissions to individual committees and not the review board as a whole. The committees in this list are the committees that will receive the submissions. When your review board is set up for Committee Submissions, members of one committee will not be able to access submissions that were not sent to their committee.

Most systems are not setup for Committee Submissions; rather, all submissions arrive in the review board submission queue. When the submission is processed it will be placed on the appropriate committee's meeting date. Each committee will have its own set of meeting dates.

Committees can be added, removed, and renamed from this area.

Click the **Add a Committee** button, enter the committee name in the Description, then click the **Save Committee** button.

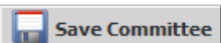


To delete a committee, select the checkbox next to the committee name, and then click on the **Delete Selected Committee(s)** button.

To rename a committee, click on the **Edit** icon next to the committee name.

A new page will open. You can modify the name by changing the Description. Click the **Save Committee** button to save your changes.

**IACUC - Committee Setup** ◀ Back



**Description:**

The changes will display in the list of committees.

If your account has been assigned to more than one committee within the review board, you will be able to flip between the committees by selecting the appropriate committee from the review board assistant menu.

Each committee will have its own unique information. Switching committees will show you details for that committee when you click on certain screens in the review board assistant menu: Meeting Agenda, Meeting Minutes, and Meeting Manager will all display information only for the committee you are currently in.

If your system is setup for Committee Submissions, the submissions queue will only contain forms sent to the committee you are currently in.



## Setup Review Board Roles

Your review board will be preset with review board roles that you can associate to users within your review board. These roles are listed in Setup Review Board Roles. From here you can rename certain roles or add new roles as needed. Each role you define in this list can then be configured in the Setup Role Access area to have access to only certain screens within the review board. This is covered in Setup Role Access, below this section.

Opening the page will list all the current roles for your review board. These are iRIS predefined review board roles and you can rename these as needed (if you want to call a role something else). However, you will not be able to delete the iRIS predefined review board roles. These predefined iRIS roles will say “Yes” in the **Reserved** column and you will not see a Delete icon next to the role name.

IACUC - Setup Roles								Back
Filter By In Use:		<input checked="" type="radio"/> Yes <input type="radio"/> No		Find				Add a New Board Role
13 result(s) found...								1 - 10
Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	
		1	Voting Board Member	Yes	Yes	Yes	Yes	
		2	Coordinator	Yes	Yes	No	Yes	
		3	Chairperson	Yes	Yes	Yes	Yes	
		4	Data Entry Member	Yes	Yes	No	Yes	
		5	Non-Voting Member	Yes	Yes	No	Yes	
		6	Alternate Member	Yes	Yes	No	Yes	
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	
		8	Expediting Board Member	Yes	Yes	Yes	Yes	
		9	Administrative Assistant	Yes	Yes	No	Yes	
		10	Ex-Officio Member	Yes	Yes	No	Yes	

To change an existing role name or change the order in which it is displayed, click the **Edit** icon.

A new page will open. From here you can change the Order Number and Role Name. When you are finished making changes, click the **Save** button. To return to the list of roles without making changes, click on the **Back to List** button.

IACUC - Setup Roles		Back
		Back To List  Save
Edit a Board Role.		
*Order Number:	<input type="text" value="1"/>	
*Role Name:	<input type="text" value="Board Member"/>	
*Allow Alternate for Meetings:	<input checked="" type="radio"/> Yes	

To add a new role, click on the **Add a New Board Role** button.

Enter the Order Number and Role Name.

IACUC - Setup Roles		Back
		Back To List  Save
Add a Board Role.		
*Order Number:	<input type="text" value="12"/>	
*In Use:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
*Role Name:	<input type="text" value="Temporary Role"/>	<input type="button" value="x"/>
*Allow Alternate for Meetings:	<input type="radio"/> Yes <input checked="" type="radio"/> No	

**In Use** - When adding a brand new role to the review board, you will also be able to specify if the role is in use. This tells the system whether to activate the role or not. If In Use is set to "Yes," then you will be able to assign a user this role. If In Use is set to "No," then you won't be able to assign a user this role. The reason for this function is to discourage deleting a role that has been used and is assigned to users. Rather than deleting the role, you can set In Use to "No," which will

preserve the history of this role and will remove the role from future use. If a role that has been used in the past is deleted, links and historical records associated to the role may not display properly.

**Allow Alternate for Meetings** – Set this flag to “Yes” to allow members assigned this role to be assigned an alternate at a meeting. Any user given the Alternate Member role or a role with this flag set to “Yes” will be included in the Alternate For list within Grant User Access & Define Roles as shown in the screenshot below.

**IACUC - Grant User Access & Define Roles** Back

Save Member Info

<b>Name:</b> Member, Jane, PhD	<input type="checkbox"/> Grant IACUC Administrative rights
<b>Highest Degree Earned:</b> PhD	<input type="checkbox"/> Grant IACUC Junior Administrative rights
<b>Gender:</b> Female	
<b>Specialty:</b> Microbiology	
<b>Relationship to the Institution:</b> Affiliated	
<b>Affiliations:</b> ABC Clinic	
<b>Representational Capacity:</b> Scientist	
<b>Representative of Specific Entity:</b>	
<b>Address:</b>	
1234 Main Street Redlands, CA 92374	
<b>Primary Number:</b> (909) 555-1234	
<b>Cell Number:</b> (909) 555-1235	
<b>Pager Number:</b> (909) 555-1236	
<b>Fax Number:</b> (909) 555-1237	
<b>Primary Email:</b> jmmember2@hgimedris.com	

Committee Access	Committee Name	Voting Member
<input checked="" type="checkbox"/>	Committee 1	<input checked="" type="checkbox"/>

**Roles**

<input type="radio"/> Board Member	<input type="radio"/> Vice-Chairperson
<input type="radio"/> Coordinator	<input type="radio"/> Expediting Board Member
<input type="radio"/> Chairperson	<input type="radio"/> Administrative Assistant
<input type="radio"/> Data Entry Member	<input type="radio"/> Ex-Officio Member
<input type="radio"/> Non-Voting Member	<input type="radio"/> Consultant/Ad Hoc Reviewer
<input checked="" type="radio"/> <b>Alternate Member</b>	
For: <input checked="" type="checkbox"/> Member, Edward	
<input checked="" type="checkbox"/> Member, Frank	

When you are finished adding the details for the new role, click on the **Save** button.

If there are more than ten roles in the list, you will need to use the page navigation to see the role you added. At the top right of the table is a list 1-10 with a green arrow. Click on the green arrow to view the next page.

+ Add a New Board Role

Filter By In Use:  Yes  No Find

13 result(s) found...

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda
		1	Voting Board Member	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes
		3	Chairperson	Yes	Yes	Yes	Yes

1 - 10

Any role added outside of the existing roles will read “No” in the **Reserved** column.

IACUC - Setup Roles							
Filter By In Use: <input checked="" type="radio"/> Yes <input type="radio"/> No							Find
12 result(s) found...							11 - 12
Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda
		11	Consultant/Ad Hoc Reviewer	Yes	Yes	No	Yes
		13	Test Role	No	Yes	No	Yes

## Setup Role Access

Setup Role Access gives you the ability to allow user(s), by role on the review board, read/write privileges within certain screens.

This page will list available screens on the left side of the matrix. The top of the page displays a list of current review board roles. Within each role are checkboxes for Read and Write. Each of these cells represents access for that user to the screen name on the left.

If the Read and Write checkboxes are both selected, that means the user has been granted full access to that page in the system – to view the page and update records on the page.

If “Read” is selected, but “Write” is not selected, that means the user has been granted read-only access to that page in the system – to view the page but not modify records on the page.

You cannot give a user Write access to a page without first giving them Read access.

The first set of Read and Write columns are to turn on/off a screen in general. If you remove Read and Write access at the top level, none of the roles on the review board will have access to that screen. This is recommended for use if you do not want to see a particular screen within your review board.

IACUC - Define Role Access											Back
											Save Changes
Screen Name			Board Member		Coordinator		Chairperson		Data Entry Member		
	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	
<b>Review Board Assistant</b>	<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 type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Submissions Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Submissions Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Submissions Agenda	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Submission General Tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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"/>	
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"/>	
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"/>	
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"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

There are vertical and horizontal scroll bars at the bottom and right of the screen so you can navigate to the other roles and screens available on the page.

If you had set up a role in Setup Review Board Roles, you would need to setup that role’s access in the Role Matrix. Any new role added to Review Board Roles will populate in a column in the Role Matrix (at the end of the list of roles). iRIS will default all Read and Write cells to be unchecked for the new role. You would need to review the role within the matrix and setup the appropriate Read and Write access for that role.

IACUC - Define Role Access											Back
											Save Changes
Screen Name			Administrative Assistant		Ex-Officio Member		Consultant/Ad Hoc Reviewer		New Board Role		
	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	
<b>Review Board Assistant</b>	<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"/>	
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"/>	
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 type="checkbox"/>	<input 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 type="checkbox"/>	<input 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 type="checkbox"/>	<input 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 type="checkbox"/>	<input 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 type="checkbox"/>	<input 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"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Be sure to click the **Save Changes** button after making any changes to this screen.

Note: This page may take a few moments to save. After clicking on the **Save Changes** button it is recommended that you wait for the page to finish loading before navigating away.

### Setup Electronic Document Stamp

The Document Stamp Setup page is used to setup the document stamp details. The document stamp is applied to documents that have been approved by the review board.

The Document Stamp Setup page can be used to set up different document stamps.

IACUC - Document Stamp Setup <span style="float: right;">Back</span>				
			<span style="border: 1px solid gray; padding: 2px;">+ Add a New Stamp</span> <span style="border: 1px solid gray; padding: 2px; margin-left: 10px;">x Delete Stamp(s)</span>	
	Edit	Title	Type	Document Category
<input type="checkbox"/>		IACUC Approval Stamp	General Purpose	N/A

The document stamp is used on Study Documents that require approval of the IACUC. Required fields are marked with red asterisks (\*).

To add a new stamp, click the **Add a New Stamp** button.

The following screen will display:

IACUC - Document Stamp Setup
Back

Preview Stamp Layout
Save Stamp Details

**\*Title:**

**Type:** General Purpose

**Comments:**

**Show Stamp On:**  Last Page Only  All Pages

**Use placeable stamp:**

**\*Stamp Position On Page:**

Top Left    Top Center    Top Right  
 Bottom Left    Bottom Center    Bottom Right

**Font Type:** Verdana

**Font Size:** 10

**Font Color:** Black

**Opacity:** 1.00

**Scale Image To Fit:**  Scale To Fit

Image file must be in .jpg format.

x No image has been uploaded.

**Stamp name**

Stamp name  
 IACUC NUMBER: IS-300GS  
 IACUC APPROVAL DATE: 01/01/2001  
 IACUC EXPIRATION DATE: 12/31/2002

**Title** – Indicate the Title of the stamp by filling out the **Title** text box.

**Type** – Choose the type of stamp. Types available are General Purpose (used for all documents, consent and other study document alike), Informed Consent (used only on consent forms), and Study Document (used only for other study documents). \*Consent form is not an option for IACUC modules.

**Category** – When the Study Document Type is selected, the user will need to select a category.

The screenshot shows a form with the following fields:

- Type:** Study Document (dropdown)
- Category:** --none-- (dropdown menu open with options: --none--, Flyer, Investigator brochure, Other, Protocol, Questionnaire, Survey)
- Comments:** (text area)
- Show Stamp On:**
  - Last Page Only
  - All Pages
- Use Placeable Stamp:**  (checkbox)

**Comments** – Add any necessary comments in the **Comments** text area.

**Show Stamp On** –Specify if the stamp appears on all pages or the last page only

**Use Placeable Stamp** – Checking this box will allow you to place the stamp on the document using exact coordinates.

The screenshot shows the 'Use placeable stamp' section with the following elements:

- Use placeable stamp:**  (checkbox)
- Coordinate (from bottom left):** X (0 - 600): 0 Y (0 - 850): 0 [Drag/drop]

**Stamp Position On Page** – When the exact coordinates are not known, checking the desired position can be done in this field.

**Font Type** – You can change the font type of the words appearing in the stamp. The preview at the top right will adjust to the selected font.

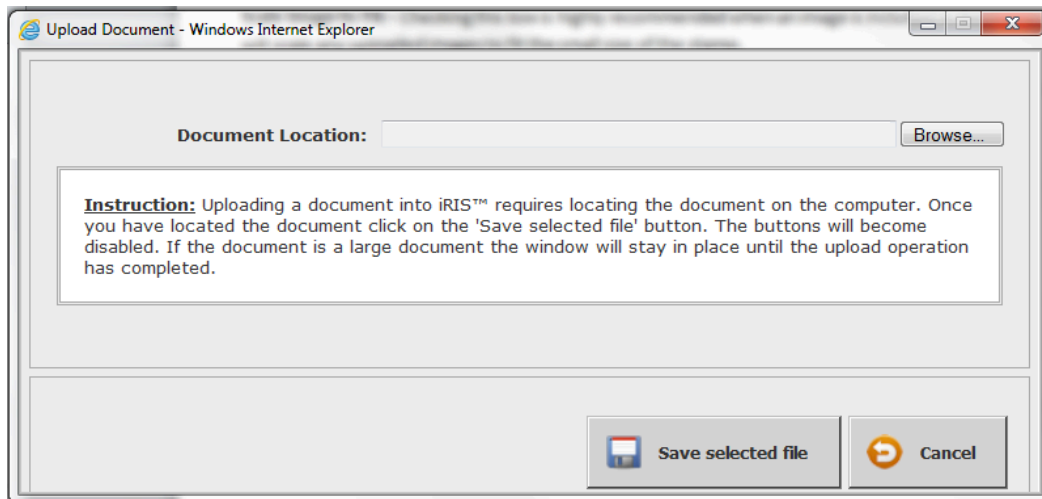
**Font Size** – You can change the font size of the words appearing in the stamp. The preview at the top right will adjust to the selected font size.

**Font Color** – You can change the font color of the words appearing in the stamp. The preview at the top right will adjust to the selected font color.

**Opacity** – You can change the opacity of the stamp. The preview at the top right will adjust to the selected opacity.

**Scale Image to Fit** – Checking this box is highly recommended when an image is included in the stamp. This checkbox will scale any uploaded images to fit the small size of the stamp.


**Upload** – Click the **Upload** button to browse your computer for the image that will be used with the stamp.





After clicking the **Upload** button, a dialog box displays. If the location of the image is known, type it into the **Document Location** text box. Or, click the **Browse** button to search for the image. When finished locating the image, click the **Save selected file** button to upload the image, or click the **Cancel** button to cancel out of uploading an image.

**Preview Stamp Layout** – When all the options are set as desired, you can click this button and a new window will pop up containing a preview of how the stamp will look in a document. It is highly recommended that you do this because some fonts might be too big and words might get cut off.

When you are finished setting the details of the document stamp and uploading an image, click the **Save Stamp Details** button to save all changes made.

Additionally, you can edit or delete existing stamps. To delete existing stamps, check the boxes next to the desired stamps. There is an option to select or deselect all by clicking the  icon. Click the **Delete Stamp(s)** button.

IACUC - Document Stamp Setup <span style="float: right;">Back</span>				
<span style="border: 1px solid gray; padding: 2px;">+ Add a New Stamp</span> <span style="border: 1px solid gray; padding: 2px; margin-left: 10px;">X Delete Stamp(s)</span>				
<input checked="" type="checkbox"/>	Edit	Title	Type	Document Category
<input type="checkbox"/>		New Stamp	Study Document	Other
<input checked="" type="checkbox"/>		IACUC stamp	General Purpose	N/A

## Setup Study Numbering

This feature is used to set up automated IACUC numbers. From this area you can set up the configuration for that auto-numbering.

To use this feature, select “Yes” to **Use Sequence for IACUC Number**. Even if the numbering is configured, the system will not use the numbering without this option being set to “Yes.”

To set up variables in automated IACUC numbers, click the checkbox in the **Use in Number** column to indicate use in the number. In this case, Constant Prefix, Calendar Year, and System Generated Number are being used to create the IACUC number. These are listed in the second column, **Description of Number Part**. The next column, **Number Part Information**, is where data values are given to the auto generated number. The last column specifies which separator to use between the chosen number parts.

IACUC - Auto Generated Numbering Setup			
			Back
			Save Numbering
Use Sequence for IACUC Number: <input checked="" type="radio"/> Yes <input type="radio"/> No			
Use in Number	Description of Number Part	Number Part Information	Separator
<input checked="" type="checkbox"/>	Constant Prefix	GH	-
<input type="checkbox"/>	School Code		
<input checked="" type="checkbox"/>	Calendar Year	<input type="radio"/> All 4 digits <input checked="" type="radio"/> Last 2 digits	
<input checked="" type="checkbox"/>	System Generated Number	1 <input checked="" type="checkbox"/> Zero Pad the Sequence Number Number of Digits 3	

The Constant Prefix will begin all IACUC numbers with the prefix as specified in **Number Part Information**. It will be followed by a separator (-), as indicated in the **Separator** column. A School Code can also be used. This code is added when setting up the department list in System Administration (See System Administration manual). The school code will be pulled from the primary department listed on the study. The Calendar Year will use the year, displaying either all four digits, or only the last two, depending on which is selected. The last row indicates that a System Generated Number will be used. The first text box is used to specify where the number should begin. In this example, the auto-generated number will start at 1 and then increase each time a new IACUC number is created. The Number of Digits specified indicates how many digits will be used. In this case, the auto generated number will start at GH-14-001, and increase one digit each time it is assigned to a study, e.g. GH-14-002, GH-14-003, GH-14-004, etc.

If you make any changes to this screen, be sure to click the **Save Numbering** button.

## Setup Agenda Categories

You can create agenda categories to use in the Finalized Agenda and Agenda Revision templates. These categories will be created using assigned unique merge codes that identify each category. You will be able to associate submission types to each category. This allows you to create agendas for each type in either the Finalized Agenda Document Template section or the Agenda Revision Document Template section (see screenshot below).

This is where you define the categories that will be included in the agendas (finalized and revision) and in the meeting minutes templates. The categories are for the different types of submission that will be made to the review board and will come up on an agenda or meeting. After you create a category, you can go into **Setup Finalized Agenda Document Template**, **Setup Agenda Revision Document Template** or **Setup Meeting Minutes Template** to create the template for this category. For more information on creating these templates refer to that section of the manual.

This section is only available if rb.use\_meeting is set to "Yes" (See **Board Configuration Options**).

IACUC - Set-up Agenda Categories					Back
<input type="button" value="+ Add Agenda Filter"/> <input type="button" value="+ Add Group"/> <input type="button" value="X Delete Group(s)"/>					
<input type="checkbox"/>	Edit	Group Name	Merge Code	Group Display Order	
<input type="checkbox"/>		New Protocols	NEW	10	
<input type="checkbox"/>		Full Renewals	RENEWAL	20	
<input type="checkbox"/>		Incident Reports	INCIDENTS	30	
<input type="checkbox"/>		Designated Member Review	DESIGNATED	40	
<input type="checkbox"/>		Adverse Events	AES	50	
<input type="checkbox"/>		Amendments	AMENDMENTS	60	

The name of the group will be displayed under **Group Name**. The code that will be used to reference this group will be displayed under **Merge Code**. The order in which the sections will appear in the **Setup Finalized Agenda Document Template**, **Setup Agenda Revision Document Template**, and **Setup Meeting Minutes Template** sections will be displayed under **Group Display Order**. Two groups may have the same group number – the most recently added will be listed after the older group.

Before creating a new group, you must add the appropriate filters to the agenda. To do so, select the **Add Agenda Filter** button.

IACUC - Set-up Agenda Filter				Back
<input type="button" value="+ Add Filter"/> <input type="button" value="X Delete Filter(s)"/>				
<input type="checkbox"/>	Edit	Filter Type	Filter Name	
<input type="checkbox"/>		Expedited Filter	Expedited Filter	

A new page will be displayed with a list of filter types (if already defined). To delete one or more filters, select the checkbox next to the filter(s) to be deleted. Select the **Delete Filter(s)** button. A confirmation dialog will appear; select **OK** button to complete the deletion or select the **Cancel** button to cancel the deletion. To edit a filter, click the **Edit** icon next to the appropriate filter. Make the necessary changes. When you are finished editing the filter, click the **Save All Changes** button.

This column displaying the type of the filter will be displayed under **Filter Type**. The name of the filter will be displayed under **Filter Name**. To add a new filter, select the **Add Filter** button.

A new page will be displayed, prompting you to enter the **Filter Type** and **Filter Name** (both are required fields). The **Filter Types** that can be added are Designated Reviewer, Expedited, Exempt, Processed Administratively, Previously Reviewed, Conflict of Interest, Board Chair COI filter, and User Defined. The **Filter Name** field will be auto-populated when a type is selected unless the Filter User Defined is selected. In that case, the name will have to be entered manually and rules for this filter will have to be defined (see below).

Order	What to Filter	Data Value	Join by, if any
1	Applic. Form all columns	What Application? --none--	--none--

Value:

The checkbox will be used to delete a clause. If there is more than one clause to a filter, they can be ordered in a sequence of which **Order** they will be run by the system. Order number 1 will run first, then 2 and so on. The first dropdown menu under the **What to Filter** column contains the items that may be selected for the system to check.

1. **Applic. Form all columns** – This will allow you to select the desired application if you have multiple applications in your system, and will list all of the data values for the selected application in the **Data Value** column.

2. **Submission Form all columns** – This will list all of the submission forms in a drop down list. When a form is selected, all the data values in that form will populate in the Data Value column.

The Data Value column will populate depending on whether you select application form or submission form from the dropdown list in the What to Filter column. The What Form? dropdown menu allows you to select the specific form that you would like to base your filter off of. The What Form Column? menu allows you to select the data value from the form, identified by its database column name. Once you have selected a form and a column, a space will appear to enter your needed value to create the filter. In the example below, the data value is a Yes/No selection. In other cases, you will have a text box in which you can type your needed value (see the above screenshot for an example).

The second row in the What to Filter column is the comparator for the filtering item selected. You can select **EQUAL** to indicate that the response in the form for the chosen data value should equal the value you select, or **NOT EQUAL** to indicate that the answer given in the form should not equal the value you select.

The “Join by, if any” dropdown menu is used when you wish to define more than one clause. The AND value signifies that all clauses have to be true for the filter to be true. The OR value signifies that only one clause has to be true for the filter to be true. Select –none- when there is only one clause in the filter.

A new clause can be created by selecting **Add a new Clause** button. To delete a clause, select the box(es) next to the appropriate clause(s) and select the **Delete Clause(s)** button.

After all values for the filter have been defined, click the **Save All Changes** button. This will return you to the filter list screen with the new filter listed. Add new filters as needed, or select the **Back** button to go back to the agenda group list.

To create a new group, click the **Add Group** button.

**IRB - Set-up Agenda Categories** Back

Save All Changes

Group Name\*:

Group Order\*:

Group Merge Code\*:

+ Add    - Remove

<input type="checkbox"/>	Form Name
No record found	

The 3 required fields are:

1. **Group Name** –This is what will be displayed in the **Setup Finalized Agenda Document Template**, **Setup Agenda Revision Document Template** and **Setup Meeting Minutes Template** sections, and within the **Agenda** page.
2. **Group Order** - This determines in which place in the list of groups this will appear. It must be a positive integer.
3. **Group Merge Code** - This is the code that the system will use to refer to this group when inserting it into the master template for the **Setup Finalized Agenda Document Template**, **Setup Agenda Revision Document Template**, and **Setup Meeting Minutes Template** sections.

There is a table underneath these fields. This is used to add submission types to this group. This means that any type of submission that is categorized with this group will pull into the section that uses the Merge Code created for this group. This will not display the entire form that is submitted, but only the information (e.g., PI, Study Title) that is specified in the **Setup Finalized Agenda Document Template**, **Setup Agenda Revision Document Template**, and **Setup Meeting Minutes Template** sections.

To add a submission type, click the **Add** button found above the right side of the table. A pop-up will open. This lists all of the available submission forms defined in your system. You may add one or more by checking the box(es) next to the form(s) that you would like to select. Click the **Select** button to add these forms to the group. Click the **Cancel** button to close the pop up without adding any forms.

Select    Cancel

<input type="checkbox"/>	Form Name
No record found	
<input type="checkbox"/>	Initial Review Submission Form
<input type="checkbox"/>	Pre-Review Correction Form - IACUC
<input type="checkbox"/>	Review Response Form - IACUC
<input type="checkbox"/>	IACUC Annual Review of Animal Use
<input type="checkbox"/>	IACUC Animal Incident Report
<input type="checkbox"/>	IACUC Amendment Submission Form

The added form(s) will appear in the table with the filters created previously listed under it. Each filter will have a drop down menu with three selectable options: “No Match Required,” “Include if this Type is found,” and “Not Included if this Type is found.”

**IRB - Set-up Agenda Categories** Back

Save All Changes

**Group Name\*:**

**Group Order\*:**

**Group Merge Code\*:**

+ Add
 x Remove

<input type="checkbox"/>		Form Name	
<input type="checkbox"/>		Amendment Form	
		Expedited Filter	<input type="text" value="No Match Required"/>
		Exempt Filter	<input type="text" value="Include if this Type is found"/>
		Application Filter	<input type="text" value="Not Included if this Type is found"/>

**No Match Required** – Select this option to indicate that you want this submission status filter to be included in this group.

**Not Included if this Type is found** – Select this option to indicate you do not want any submissions with this status filter to be included with this group.

**Include if this Type is found** – Select this option to indicate that you want submission types with this status to be included in the group, and also exclude all undefined status filters from the group. It will also exclude the status filters that are defined as No Match Required.

When you are finished adding the form definitions for the group, click the **Save All Changes** button to add this group to the agenda categories list. To remove a form from the group, check the box next to the form to be deleted and click **Remove**.

After returning to the main Agenda Category screen, if you wish to delete one or more groups, check the boxes next to the group(s) to be deleted. There is an option to select or deselect all by clicking the icon. Click the **Delete Group(s)** button. A confirmation dialog box appears; click the **OK** button to complete the deletion. To cancel, click the **Cancel** button.

To edit a group, click the icon next to the appropriate group. Make the necessary changes. When you are finished editing the group, click the **Save All Changes** button.

This list will be viewable on the Meeting Agenda screen.

<input type="checkbox"/> <b>Initial Reviews</b> - 0 Submissions 0 Items for review in this category.
<input type="checkbox"/> <b>Continuing Reviews</b> - 0 Submissions 0 Items for review in this category.
<input type="checkbox"/> <b>Expedited Items</b> - 0 Submissions 0 Items for review in this category.
<input type="checkbox"/> <b>Amendments</b> - 0 Submissions 0 Items for review in this category.

## Setup Finalized Agenda Document Template

You can create a master template for your Meeting Agenda document. This template will store your meeting agenda outline. You can use merge codes to pull in submission information as well as other key study elements into the agenda. (See the IACUC Assistant – Meetings manual for instructions on how to generate the agenda for a specific meeting).

**IACUC - Finalized Agenda Templates** ◀ Back

**1. Setup the Agenda Template Master which describes the layout of the minutes document**

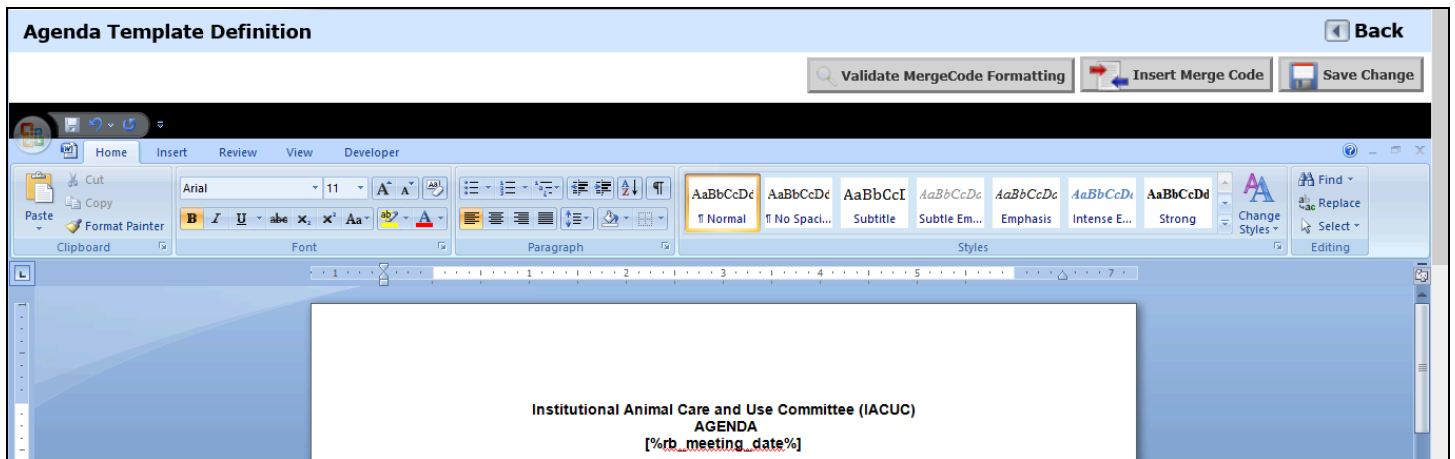
Agenda Template Master Setup Agenda Template

**2. Setup the Agenda Template Section which will merge the data from each Agenda submission**

Submission Type	Edit Template
New Protocols	Setup Section Information
Full Renewals	Setup Section Information
Incident Reports	Setup Section Information
Designated Member Review	Setup Section Information
Adverse Events	Setup Section Information
Amendments	Setup Section Information

The Finalized Agenda Templates page lists the Agenda Template Master, which is used to describe the general layout of the agenda document, and the different sections that can be added to the master template. You can setup the template for these sections, which will merge data from each submission into the Master Agenda Template.

You will first define the content of the Agenda Template Master. To do so, click on the **Setup Agenda Template** button.

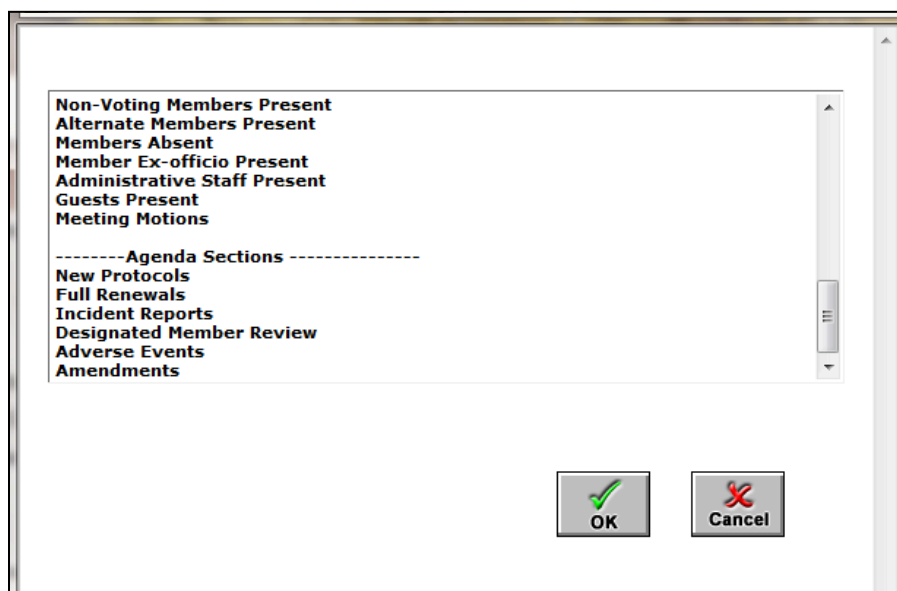


A new page will open, containing an embedded Word editor. If the template master has already been created, it will be displayed similar to the example above. If the master was not created, this is where it can be created using the features of the text editor and inserting merge codes. To insert a merge code, click the **Insert Merge Code** button. A window will pop up listing the available merge codes. Select the merge code to insert, and then click the **OK** button.

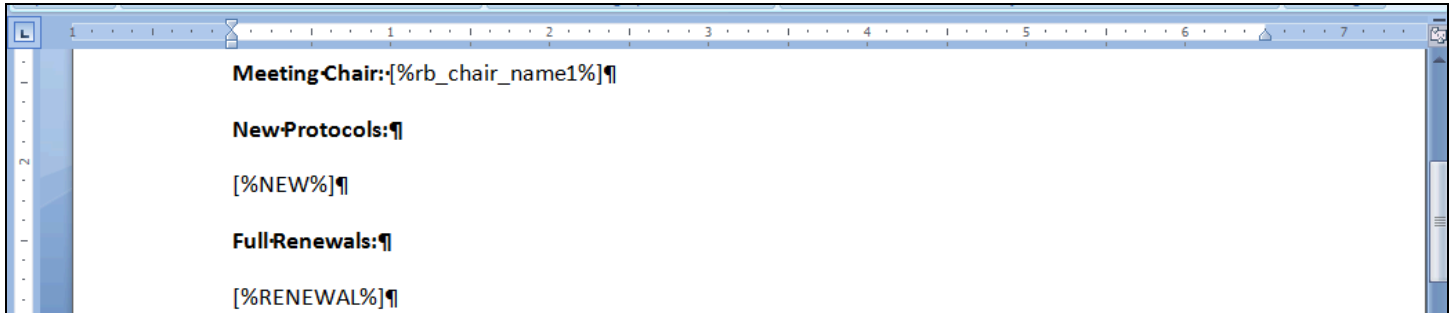
A merge code is a programmed label that will pull information into the document when the document is generated. In the example above, when the Agenda is generated for a specific meeting date, the merge code for the meeting date will populate with the date of the meeting.

You can set up your Agenda template in any way, using the tools available in Word and with the use of the merge codes.

You will want to pull your agenda sections into the Agenda Master Template, which are found towards the bottom of the list of merge codes.

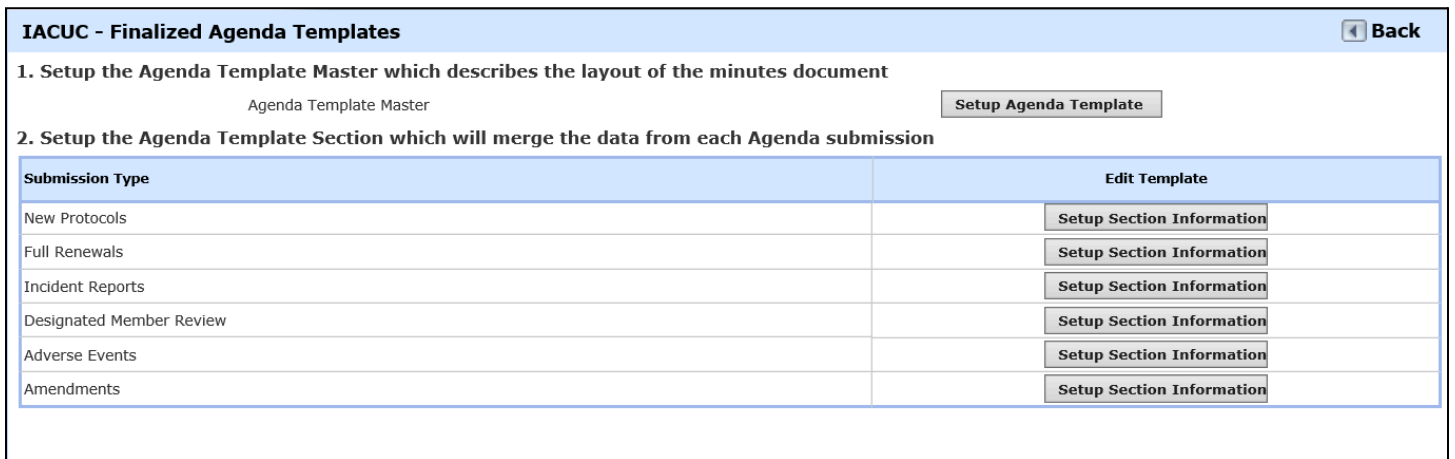


Merge codes are used to tell the Agenda Template Master to pull in specific information about the submissions being reviewed at a particular meeting.



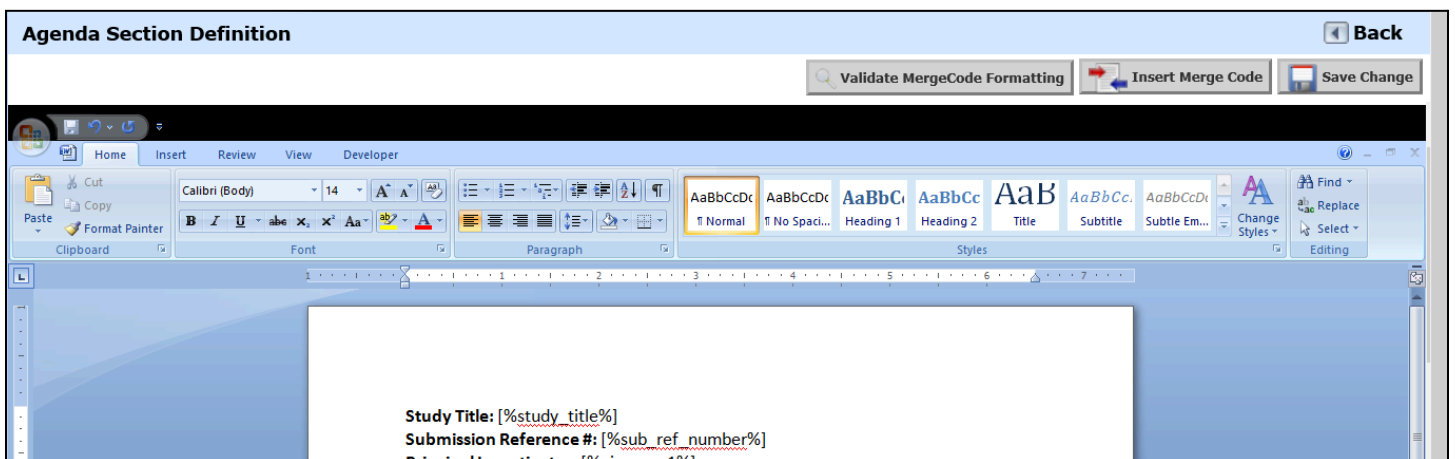
These merge codes are setup in the Agenda Master Template and will pull in information from the sections set up in the Section Information.

When you are finished editing or creating the template master, click the **Save Changes** button (top of the screen).

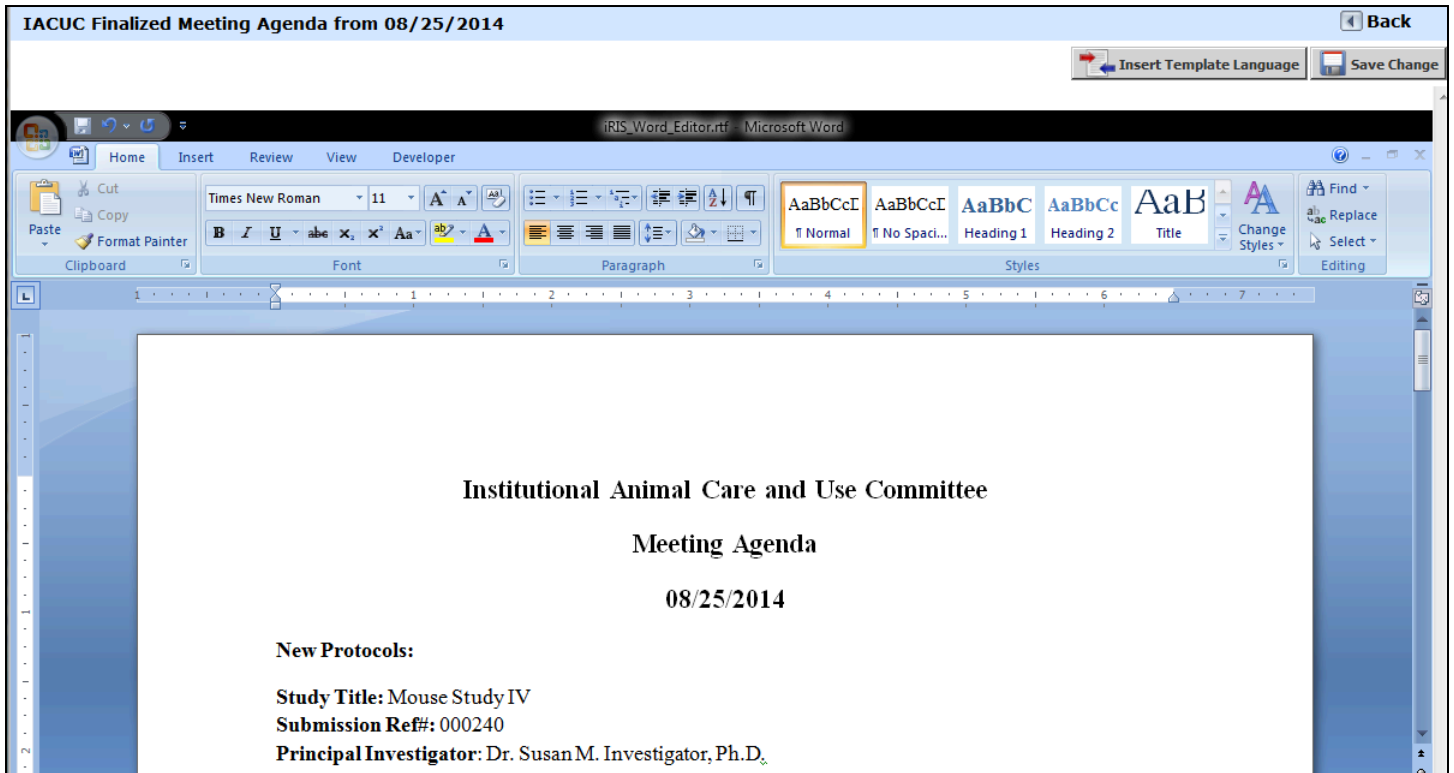


When a Meeting Agenda is generated for the review board, the general information listed in the Agenda Template Master will display. Then, the agenda will list each of the submissions assigned to the meeting based on the section merge codes set up in the Agenda Template Master.

You will set up what the Agenda Template Master should display for each type of submission in the appropriate Section Information. To edit a submission type template, click on the **Setup Section Information** button.



Edit or create this section as explained in creating/editing the Agenda Template Master, except this information will be specific to the type of submission, not the general Meeting Agenda information.

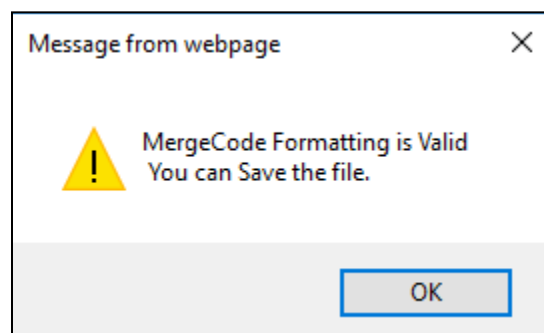


When you generate a Meeting Agenda for a specific meeting date, the system will generate one document using the Agenda Template Master and the Agenda Template subsections.

### Validate MergeCode Formatting

Validate MergeCode Formatting is a functionality that allows you to test whether the merge codes in your template contain invalid RTF content that will prevent them from populating correctly in your documents. For example, if the text in part of a merge code, but not the entire merge code, is bolded, this is the type of error that Validate Merge Code Formatting will correct.

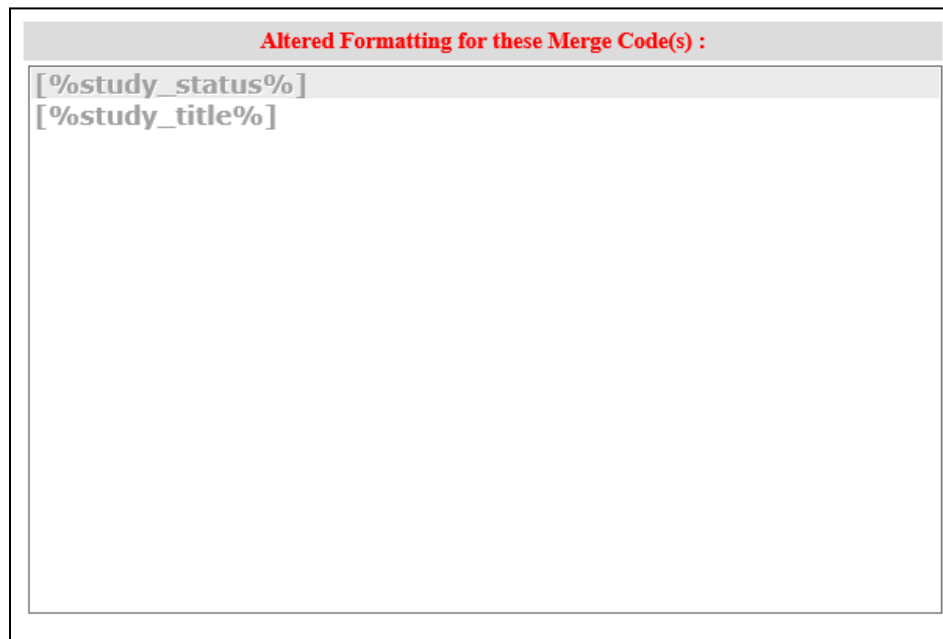
When you click Validate MergeCode Formatting, one of three things will occur. If all the merge code formatting in your template is valid, you will see the following message:



If any of your merge codes contain invalid content, as seen below, you will get a popup message displaying the merge codes that the system could correct for you.

Study Title: [%**study\_title**%]  
Study Status: [%*study\_status*%]

In the example given, you can see that part of one merge code is bolded and the other is partially italicized. When you click Validate MergeCode Formatting, you will see the following popup:



When you look at the document again, the merge codes are corrected. If you need to, you can click the **Undo Changes** button to revert to the previous version of the merge codes.

If there is an incorrect merge code that cannot be validated, the system will return an error message. For example, if “[%” or “%]” is entered in the template with no other associated merge code content, you will receive the following error:

 **There was error while clearing merge code formatting. Please manually clear formatting of each merge code. 1. Select a merge code. 2. Go to 'Home' > 'Styles' > Click 'More' > Click 'Clear Formatting'.**

You can go in and remove any incorrect merge code data as described above or follow the instructions in the error message to manually clear merge code formatting.

When you have finished editing the template, click **Save Change**, or click **Back** to return to the main setup screen without changes. On the Consent Template Master Setup screen, click **Save Template** to finish completing your template and return to the main list of templates.

## Setup Agenda Revision Document Template

This has the same concept as the Finalized Agenda Document Template page. It has an Agenda Revision Master Template and subsections to set up details for different submissions. The Revision Agenda Template is used to generate an addendum in the case that a new submission is placed on the agenda after the main Agenda has been published for the meeting date.

**IACUC - Agenda Revision Templates** ← Back

**1. Setup the Revision Template Master which describes the layout of the minutes document**

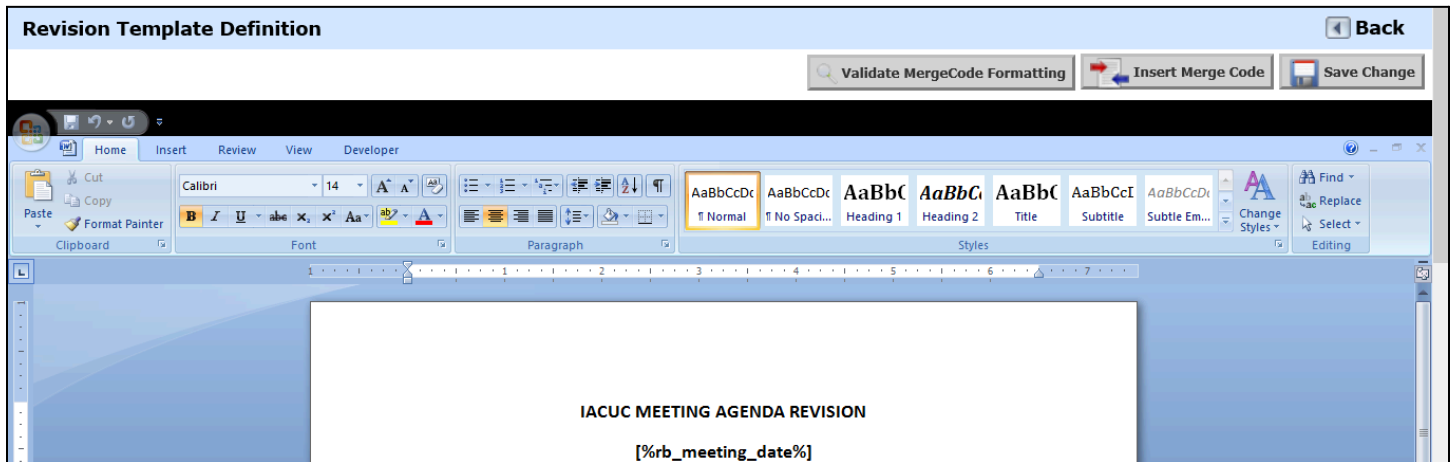
Revision Template Master Setup Revision Template

**2. Setup the Revision Template Section which will merge the data from each Revision submission**

Submission Type	Edit Template
New Protocols	Setup Section Information
Full Renewals	Setup Section Information
Incident Reports	Setup Section Information
Designated Member Review	Setup Section Information
Adverse Events	Setup Section Information
Amendments	Setup Section Information
Expedited	Setup Section Information

The Agenda Revision Templates page lists the Revision Master Template (describes the general layout of the agenda’s document) and the different sections that can be added to the master template. You can set up the template for these sections individually, which will merge data from each submission into the Master Agenda RevisionTemplate.

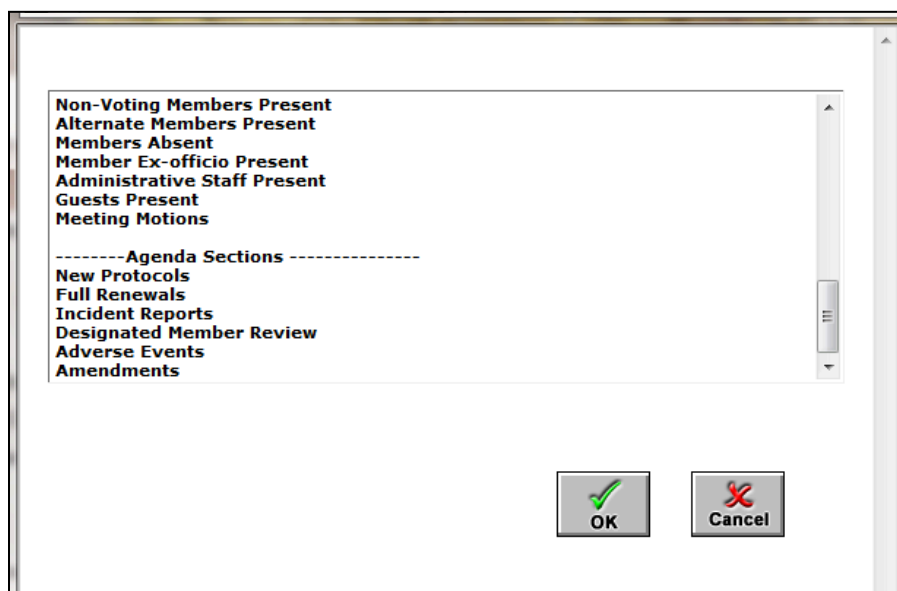
You will first define the content of the Agenda Revision Template Master. Click on the **Setup Revision Template** button.



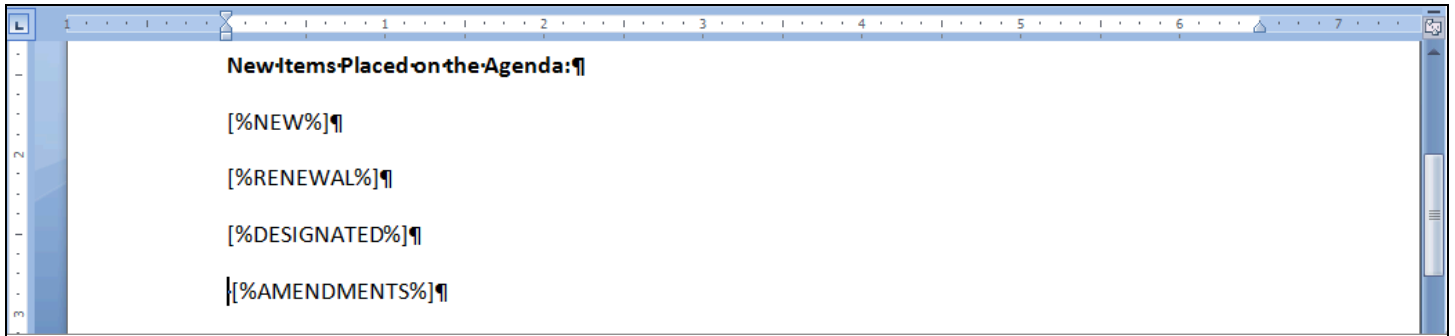
A new page will open, containing an embedded Word editor. If the template master has already been created, it will be displayed similar to the example above. If the master was not created, this is where it can be created by using the features of the text editor and inserting merge codes. To insert a merge code, click the **Insert Merge Code** button. A window will pop up listing the available merge codes. Select the merge code to insert, and then click the **OK** button.

A merge code is a programmed label that will pull information into the document when the document is generated. When the Agenda is generated for a specific meeting date, the merge code for the meeting date will populate with the date of the meeting.

You will want to pull your agenda sections into the Agenda Revision Template Master, which are found at the bottom of the list of merge codes.



Merge codes are used to tell the Agenda Revision Template Master to pull in specific information about the submissions being reviewed at a particular meeting.



Merge codes are entered in the Agenda Revision Master Template, and will pull in information from the sections set up in the Section Information.

When you are finished editing or creating the template master, click the **Save Changes** button.

**IACUC - Agenda Revision Templates** ◀ Back

1. Setup the Revision Template Master which describes the layout of the minutes document

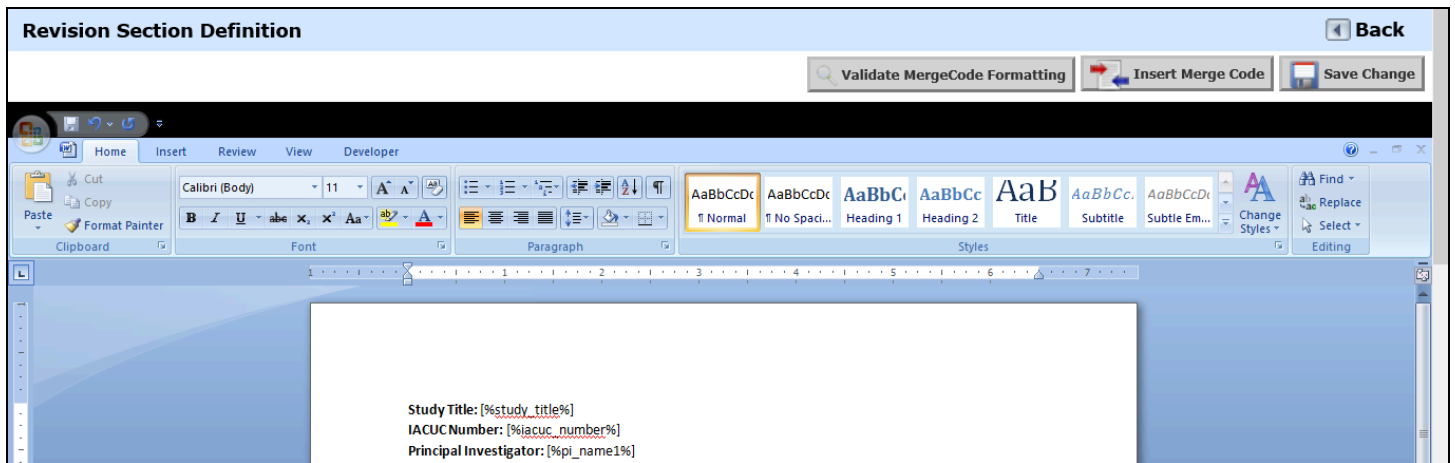
Revision Template Master Setup Revision Template

2. Setup the Revision Template Section which will merge the data from each Revision submission

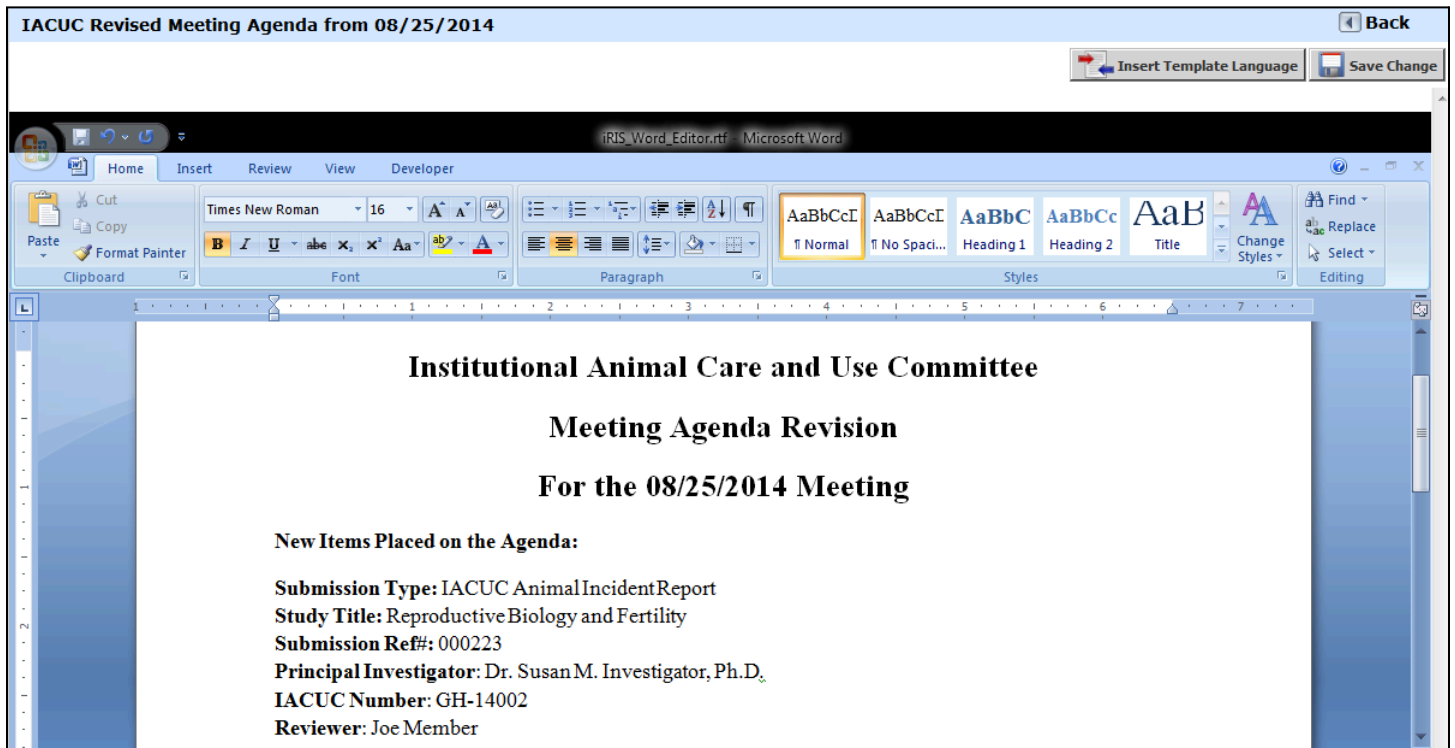
Submission Type	Edit Template
New Protocols	Setup Section Information
Full Renewals	Setup Section Information
Incident Reports	Setup Section Information
Designated Member Review	Setup Section Information
Adverse Events	Setup Section Information
Amendments	Setup Section Information
Expedited	Setup Section Information

When a Meeting Agenda Revision is generated for the review board, the general information from the master template will display. Then, the agenda will list each of the submissions assigned to the meeting based on the section merge codes set up in the Agenda Revision Template Master.

You will setup what the Agenda Template Master should display for each Submission in the appropriate Section Information. To edit a submission type template, click on the **Setup Section Information** button.



Edit or create this section as explained in creating/editing the Revision Agenda Template Master, except this information will be specific to the submission, not the general Meeting Agenda information.



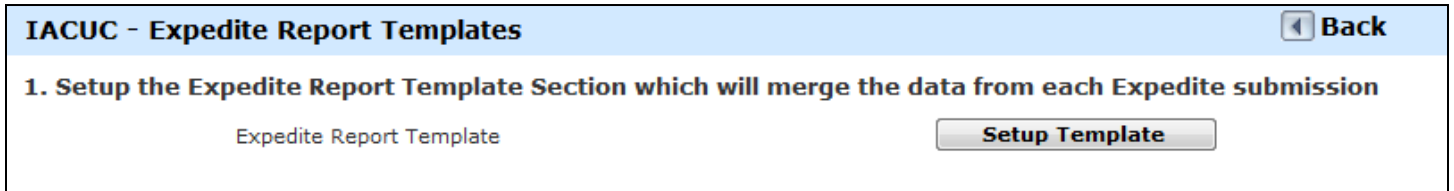
When you generate a Meeting Agenda Revision on a specific meeting date, the system will generate one document using the Revision Template Master and Agenda Template subsections.

## Setup Expedite Report Template

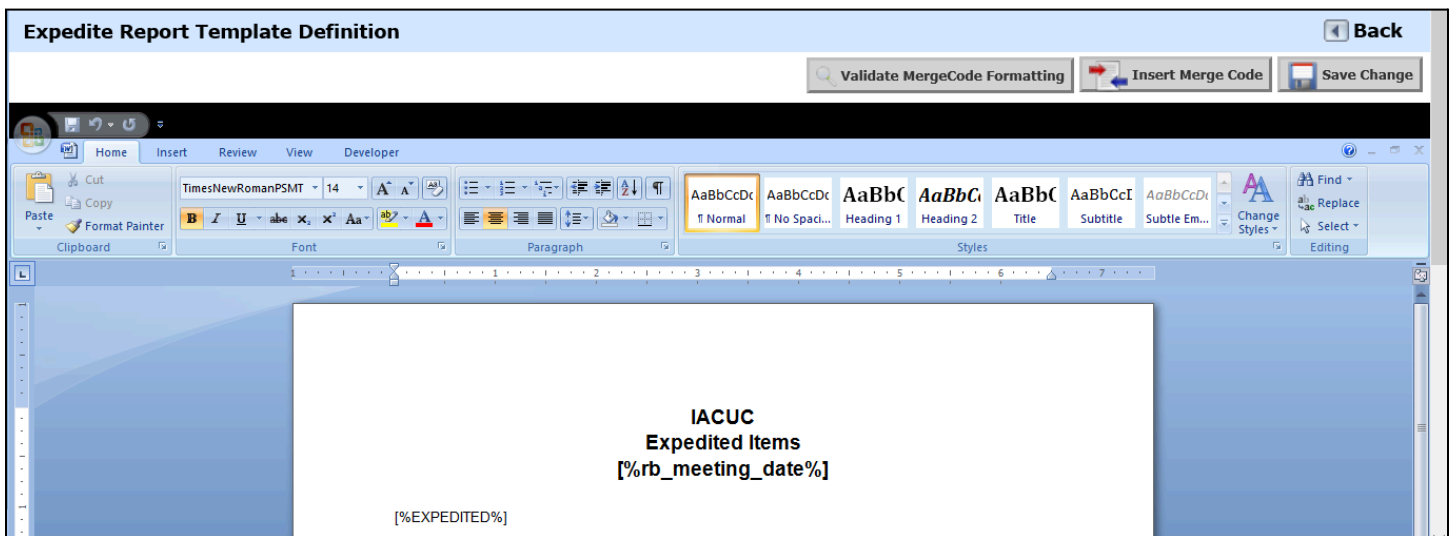
Generate a report to attach to a meeting date that will summarize Expedited Reports. This feature is only available if the review board property `rb.use_expedited_report` is set to "Yes" within the Meeting Settings group.

The Expedite Report Template works similar to the Meeting Agenda and Minutes Templates. You can define text and merge codes within an embedded Word document. The Expedited Report Template does not contain sections like the

Agenda and Minutes templates. The Expedited Report Template will contain one section to set up, as shown in the screenshot below. Click the **Setup Template** button.



This will open the embedded Word document. Click on **Insert Merge Codes** to add the Expedited Group merge code. Your Expedited submission information must be set up in the Expedited section when you are setting up the Finalized Agenda. Click on **Save Changes** when you are done.



To generate an Expedited Report, you must go to a finalized meeting agenda within Review Board Assistant > Meeting Manager. Start by clicking **Generate an Expedite Report** under the Expedite Report group. The system will generate a document based on any Expedited submission placed on this particular meeting date. (Note: The system will identify Expedited submissions based on the rules set up when creating agenda categories.) You can edit the document before publishing by checking out the document to your desktop (**Check-Out the Expedite Report For Editing In Word**) or you can make your changes within the browser (**Edit the Expedite Report Within The Browser**). When you are finished, click **Publish the Expedite Report** to convert the Word document to a PDF document.

**IACUC Meeting Minutes from 08/25/2014**

---

Meeting Agenda Options -> Current Agenda Status

**Click To Open The Meeting Agenda**

**Meeting Status:**  Draft  Finalized

**Enable Reviewer Notifications?**  Yes  No

**Finalized Agenda**

**Send The Finalized Agenda Document To All Members**

**Unpublish The Finalized Agenda**

**View The Finalized Agenda Document**

**Expedite Report**

**Generate An Expedite Report**

**Check-Out The Expedite Report For Editing In Word**

**Edit The Expedite Report Within The Browser**

**Publish The Expedite Report**

Once you publish the Expedited Report, a PDF file will populate on the Meeting Agenda in the **Expedite Reports** section. This table will also contain the number of Expedited submissions included in the report.

**IACUC - Review Board Meeting Agenda** Back

---

Items to be Reviewed at Committee One Meeting held on December 02, 2016 Agenda State: **Finalized**  
Reviewer Notifications: **Disabled** Save Changes

<ul style="list-style-type: none"> <li> Meeting Attendance</li> <li> Call to Order</li> <li> Old Business</li> <li> New Business</li> <li> Miscellaneous</li> <li> Closing Comments</li> <li> Meeting Motions</li> <li> Review Documents</li> <li> Expedite Reports</li> </ul>	<p><b>Voting Members Absent</b> Susan Investigator</p>
--	--

View File	Title
No documents have been associated with this agenda	

View File	Number of Expedite Reviews
	1

### Setup Meeting Minutes Template

You can create a master template for your Meeting Minutes document. This template will store your meeting minutes outline. With the use of merge codes you can pull in specific information regarding the meeting when you generate the minutes for that meeting (see documentation on the Meeting Manager for instructions on how to generate the minutes for a specific meeting).

**IACUC - Minute Templates** ← Back

1. Setup the Minutes Template Master which describes the layout of the minutes document

Minutes Template Master Setup Minutes Template

2. Setup the Minutes Template Section which will merge the data from each Agenda submission

Submission Type	Edit Template
New Protocols	Setup Section Information
Full Renewals	Setup Section Information
Incident Reports	Setup Section Information
Designated Member Review	Setup Section Information
Adverse Events	Setup Section Information
Amendments	Setup Section Information
Expedited	Setup Section Information

The Minute Templates page lists the Minutes Template Master and the different sections that can be added to the master template. You can set up the template for these sections, which will merge data from each Submission into the Master Minutes Template.

You will first define the content of the Minutes Template Master. Click on the **Setup Minutes Template** button.

**Minutes Template Definition** ← Back

Validate MergeCode Formatting   Insert Merge Code   Save Change

Institutional Animal Care and Use Committee (IACUC)  
Minutes  
[%rb\_meeting\_date%]

Voting Members Present: [%vote\_members\_present%]

Voting Members Absent: [%members\_absent%]

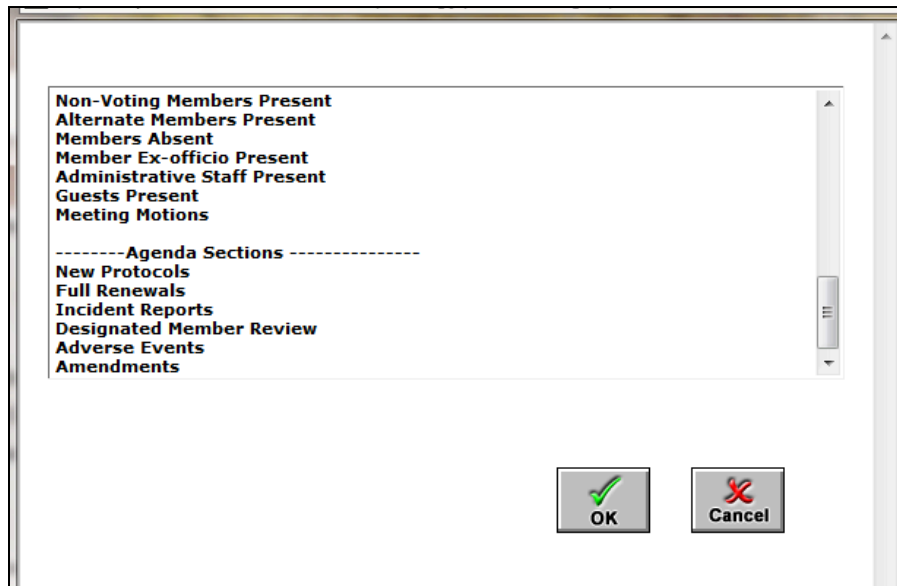
Non-voting Members Present: [%non\_vote\_members\_present%]

A new page will open, containing an embedded Word editor. If the template master has already been created, it will be displayed like the example in the above screenshot. If the master was not created, this is where it can be created by using the features of the text editor and inserting merge codes. To insert a merge code, click the **Insert Merge Code** button. A window will pop up listing the available merge codes. Highlight the merge code to insert, and then click the **OK** button.

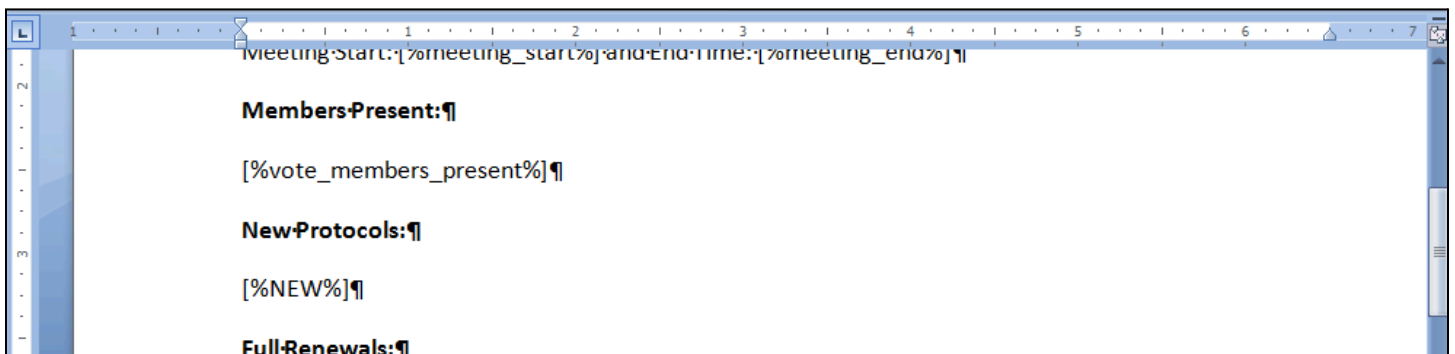
A merge code is a programmed label that will pull information into the document when the document is generated. In the example above, when the Minutes document is generated for a specific meeting date, the merge code for the meeting date will populate with the date of the meeting.

You can set up your Minutes template using the tools available in Word and the available merge codes.

You will want to pull your agenda sections into the Minutes Master Template, which are found at the bottom of the list of merge codes.



Merge codes are used to tell the Minutes Template Master to pull in specific information about the submissions being reviewed at a particular meeting.



The section merge codes entered into the Minutes Master Template will pull in information from the sections set up in the Section Information.

When finished editing or creating the template master, click the **Save Changes** button.

**IACUC - Minute Templates** Back

1. Setup the Minutes Template Master which describes the layout of the minutes document

Minutes Template Master Setup Minutes Template

2. Setup the Minutes Template Section which will merge the data from each Agenda submission

Submission Type	Edit Template
New Protocols	Setup Section Information
Full Renewals	Setup Section Information
Incident Reports	Setup Section Information
Designated Member Review	Setup Section Information
Adverse Events	Setup Section Information
Amendments	Setup Section Information
Expedited	Setup Section Information

When Meeting Minutes are generated for the review board, the general information will display in the Minutes Template Master. Then, the document will list each of the submissions assigned to the meeting based on the section merge codes set up in the Minutes Template Master.

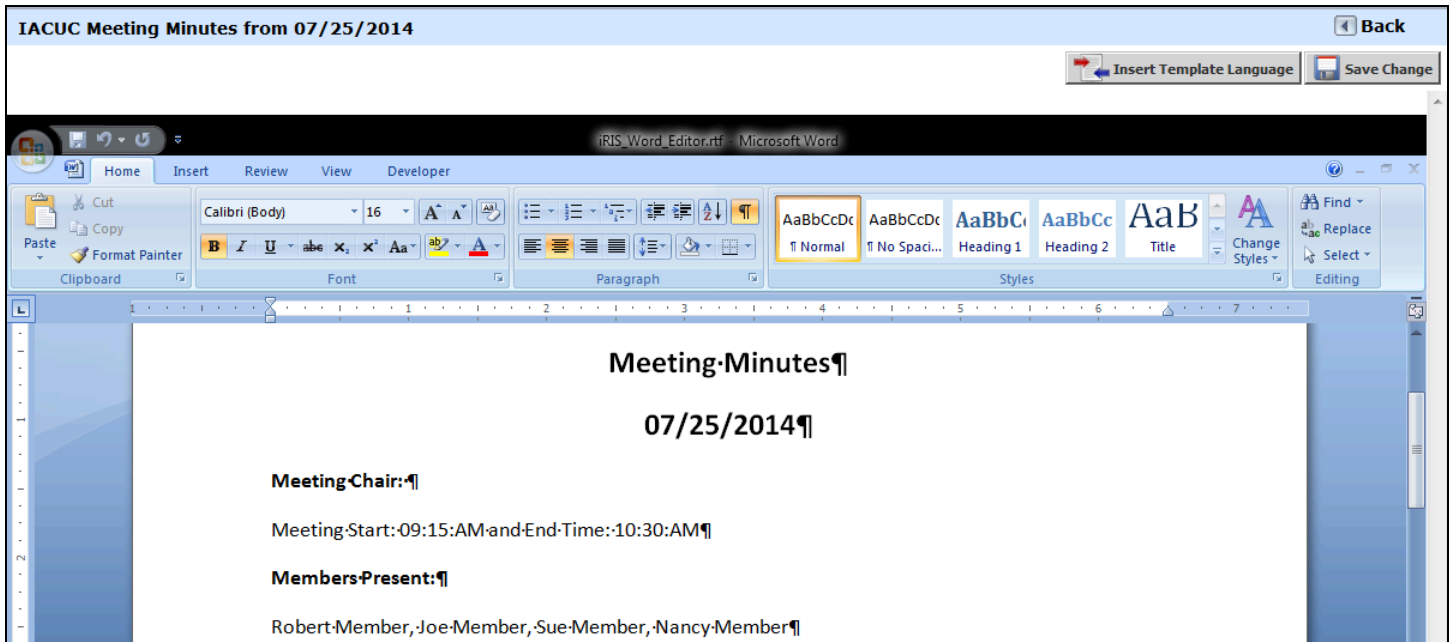
You will set up what the Minutes Template Master should display for each submission in the appropriate Section Information. To edit a submission type template, click on the **Setup Section Information** button.

**Minutes Section Definition** Back

Validate MergeCode Formatting   Insert Merge Code   Save Change

Study Title: [%study\_title%]  
Principal Investigator: [%pi\_name1%]

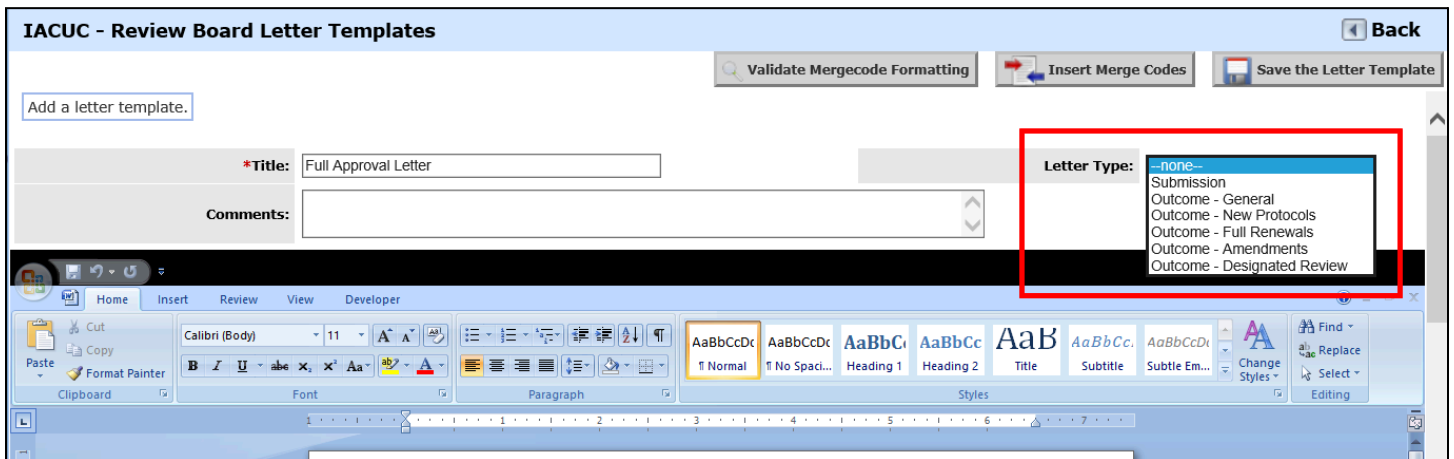
Edit or create this section as explained in creating/editing the Minutes Template Master, except this information will be specific to the submission, not the general meeting information.



When you generate Meeting Minutes on a specific meeting date, the system will generate one document using the Minutes Template Master as well as the subsections.

### Setup Outcome Letter Groups

The Outcome Letter Groups are defined and listed in this screen. The groups created here will be listed in the Letter Types dropdown list on the Setup Outcome Letter Templates screen, as shown below.



The list of Outcome Letter Groups will be similar to this screen below.

The screenshot shows the 'IACUC - Set-up Letter Categories' interface. At the top right, there is a 'Back' button and two buttons: '+ Add Group' and 'X Delete Group(s)'. Below this is a table with a header row containing an 'Edit' icon and the text 'Group Name'. The table lists four categories:

<input type="checkbox"/>	Edit	Group Name
<input type="checkbox"/>		Amendments
<input type="checkbox"/>		Designated Review
<input type="checkbox"/>		Full Renewals
<input type="checkbox"/>		New Protocols

To delete existing groups, check the boxes next to the desired group(s) and click the **Delete Group(s)** button. It is possible to select or deselect all checkboxes by clicking on the icon at the top of the column of checkboxes. To edit a group, click the **Edit** icon.

To add a new group, click the **Add Group** button.

The screenshot shows the 'IACUC - Set-up Letter Categories' interface with the 'Add Group' process. At the top right, there is a 'Back' button and a 'Save All Changes' button. Below this is a text input field labeled 'Group Name\*' with the value 'Incidents'. Below the input field are two buttons: '+ Add' and 'X Remove'. Below these buttons is a table with a header row containing a 'Form Name' column and several outcome categories: 'Expedite', 'Exempt', 'Denied', 'Processed Administrative', and 'Designated Review'. The table currently shows 'No records found'.

<input type="checkbox"/>	Form Name	Expedite	Exempt	Denied	Processed Administrative	Designated Review
No records found						

Type in the Group Name, as this is a required field. To associate this particular outcome letter type to a submission type, click the **Add** button. The following screen will display:

The screenshot shows a selection dialog box. At the top right, there are 'Select' and 'Cancel' buttons. Below this is a table with a header row containing a 'Form Name' column and a checkbox column. The table lists six submission forms:

<input type="checkbox"/>	Form Name
<input type="checkbox"/>	Initial Review Submission Form
<input type="checkbox"/>	Pre-Review Correction Form - IACUC
<input type="checkbox"/>	Review Response Form - IACUC
<input type="checkbox"/>	IACUC Annual Review of Animal Use
<input type="checkbox"/>	IACUC Animal Incident Report
<input type="checkbox"/>	IACUC Amendment Submission Form

Check the box next to the desired submission form(s) types to include in this category, and then click the **Select** button.

The selected form(s) will be added to the Outcome Letter Group. Listed in columns next to the submission form name will be several columns listing different review processes, depending on your system settings. This allows you to specify which review process any letter associated to this group should display for. If a letter group applies to a Full Board review,

no selection is needed. The form being listed in the group will cause the letter to display. Select the checkbox in the columns that are applicable, then click the **Save All Changes** button.

To remove unwanted forms, check the box next to the desired form in the table and click the **Remove** button.

**IACUC - Set-up Letter Categories** Back

Save All Changes

Group Name\*:

<input type="checkbox"/>	Form Name	Expedite	Exempt	Denied	Processed Administrative	Designated Review
<input type="checkbox"/>	IACUC Animal Incident Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Remove

In the above screenshot, the Group Name is called “Incidents.” In the Setup Outcome Letter Templates screen, outcome letter templates can be created and associated to this letter type by selecting the “Outcome-Incidents Type,” from the dropdown list. Any template that is saved in the Outcome Letter Templates list that is of the type “Incidents” will then appear in the Notification Letter dropdown list when an incident submission (using the submission form listed above) has been assigned to a Full Board review.

Print Friendly Create Letter

Outcome Letter ⓘ

Notification Letter:

Delete/Void	Send	Edit/View	Title	Signature Required	Status	Route Signoff	Copy
No Letters have been created for this submission.							

### Setup Outcome Letter Templates

You can setup your review board’s Outcome Letters here. Letter templates are created using merge codes that will pull information specific to the submission when the letter is generated.

**IACUC - Review Board Letter Templates** Back

Add a New Template Delete Selected Template(s)

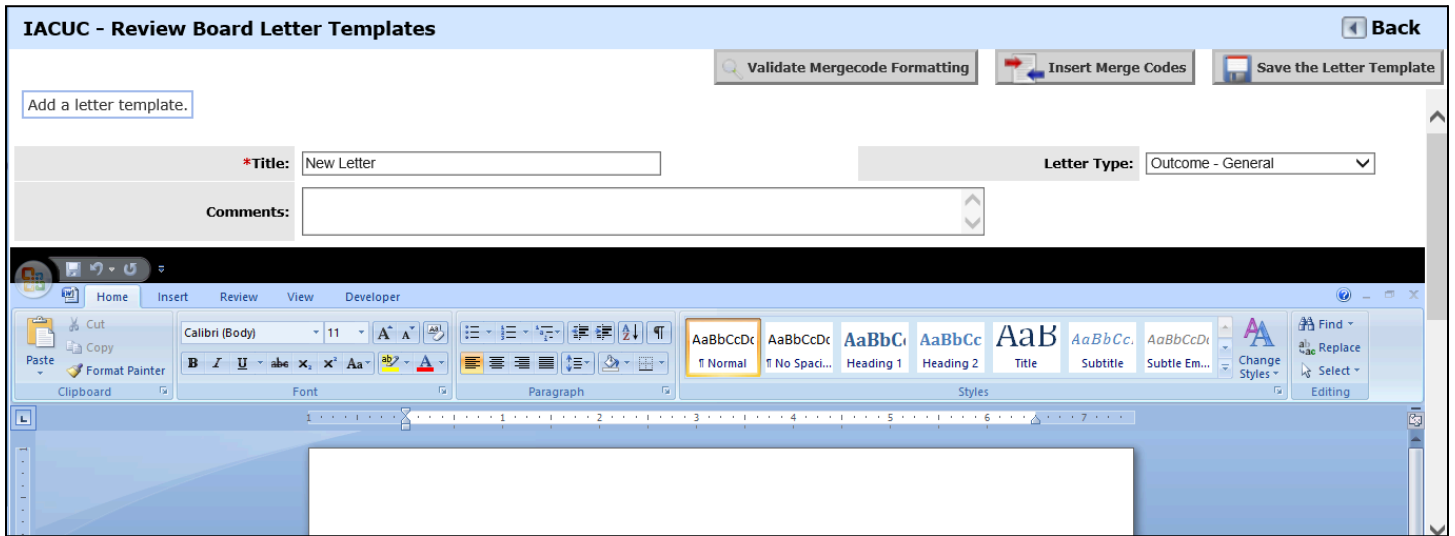
List of letter templates

5 result(s) found...

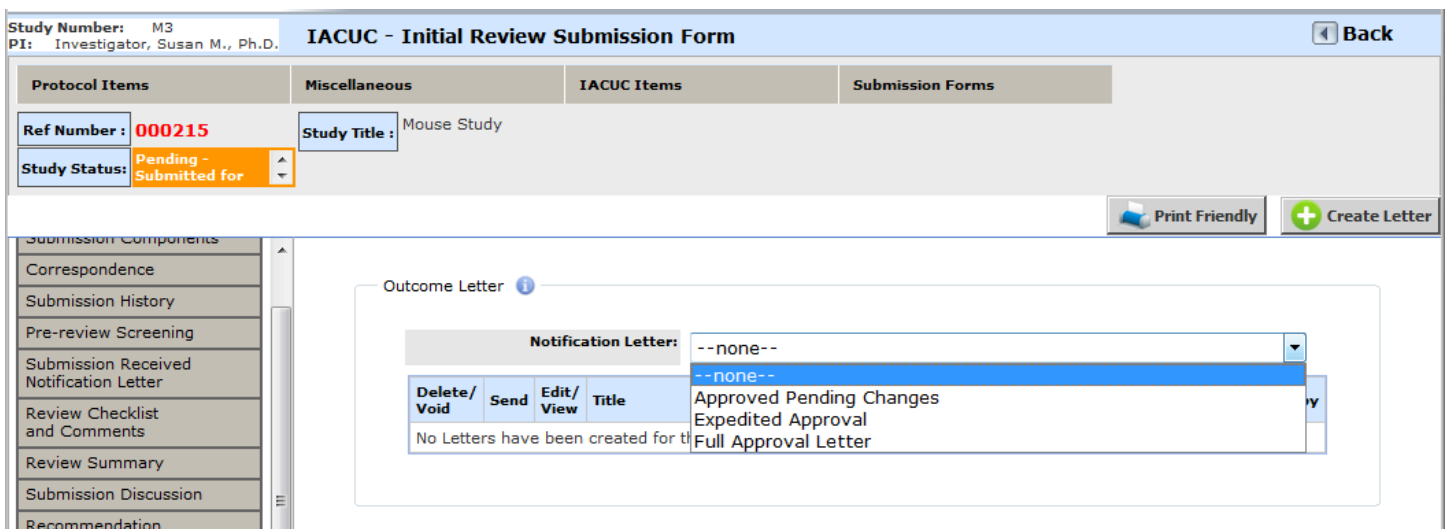
<input type="checkbox"/>	Edit	Title	Letter Type	Last Modified by	Date Modified
<input type="checkbox"/>		Amendment Approved	Outcome - Amendments	Administrator	06/24/2014
<input type="checkbox"/>		Approved Pending Changes	Outcome - General	Administrator	06/24/2014
<input type="checkbox"/>		Expedited Approval	Outcome - General	Administrator	06/24/2014
<input type="checkbox"/>		Full Approval Letter	Outcome - General	Administrator	06/24/2014

When you open the page, any letter already defined for the review board will list on the page, displaying the Title, Letter Type, Last Modified By, and Date Modified information. You can edit an existing letter by clicking on the **Edit** icon or you can add a brand-new letter by clicking on the **Add a New Template** button.

If the number of letter templates exceeds ten results, a small **green arrow** will display on the top right of the letter templates table. Click this arrow to move to the next page of letter templates.



When you add a new letter template, a page will open containing an embedded Word editor. If you had chosen an existing template, the Word editor would contain the content of the letter template. Enter the Title of the template and select a Letter Type from the drop down list. Any of the Outcome Letter Groups created will populate in this list, along with two other standard letter types: Submission and Outcome – General.



Selecting the Letter Type from the dropdown list will cause the letter template to be listed among the templates available in the Outcome tab in the submission processing screens, depending on the submission form and the review process selected.

The other letter types, Outcome – General and any of the custom Outcome Letter Groups created will cause a letter associated to its group to display within the Outcome tab. Filters associated to the custom Outcome Letter Groups will cause a letter to appear or not appear in the dropdown list, but a letter associated to the Outcome – General Group will always be available. For example, a letter associated to the group called “Outcome – Full Renewal Approval” will only be available when a Full Renewal Submission type is being completed, because the filter is associated to the Full Renewal Submission type. If you are processing any other submission type, this letter will not be available.

Add content to the template by inserting merge codes (click the **Insert Merge Code** button) and using features of the embedded Word editor.

When finished creating the template, click the **Save the Letter Template** button to save.

## Setup Canned Motion

You can setup a list of canned motion text that you can use to pull into a motion for a submission. You can have any number of canned motions in this list.

The screenshot shows the 'IACUC - Canned Motion Setup' interface. At the top right, there is a 'Back' button. Below it are two buttons: '+ Add a New Motion' and 'X Delete Selected Motion(s)'. A search bar contains the text 'List of approved canned motion'. Below the search bar, it says '2 result(s) found...'. A table displays the results:

<input type="checkbox"/>	Edit	Motion Name
<input type="checkbox"/>		Approve as is
<input type="checkbox"/>		Approve with Mods

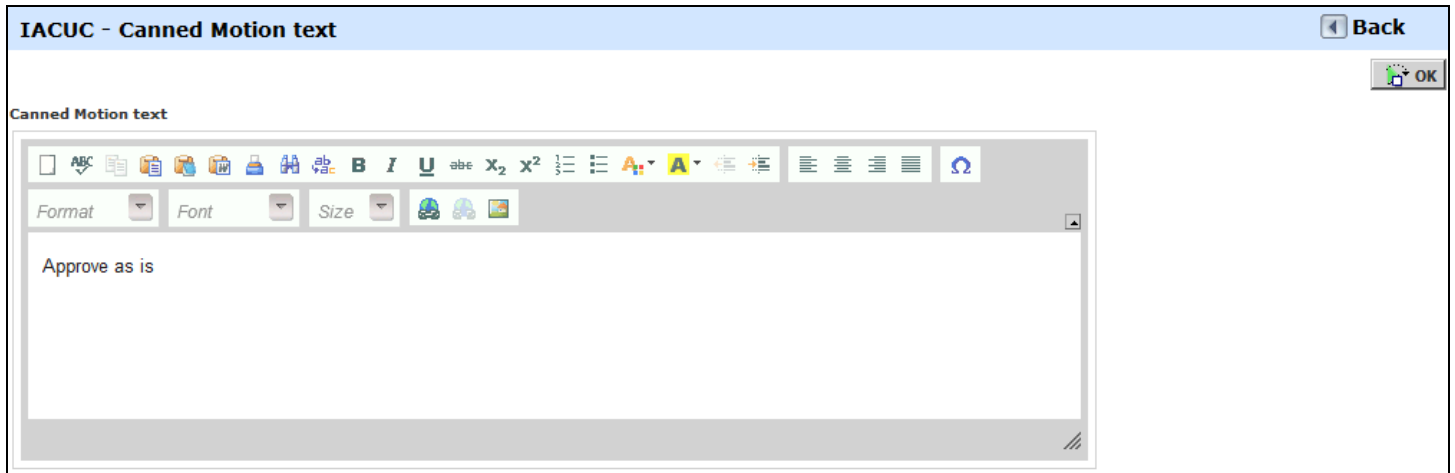
When you open the page, a list of any canned motions will display. If canned motions have not yet been added, this page will not list any records. You can click the **Add a New Motion** to add a new canned motion to the list.

The screenshot shows the 'IACUC - Canned Motion Setup' interface for adding a new motion. At the top right, there is a 'Back' button and a 'Save Motion' button. A text input field contains the placeholder text 'Add Canned Motion of submission item.'. Below this, there are two required fields:

- \*Name:
- \*Item Number:

At the bottom, there is a link: [Click here to edit/view the motion text](#)

When you add a new canned motion, you will need to provide the **Name** of the motion and the **Item Number** (order in which the canned motion is displayed). To add the content of the canned motion, click on the link '[Click here to edit/view the motion text](#)'.

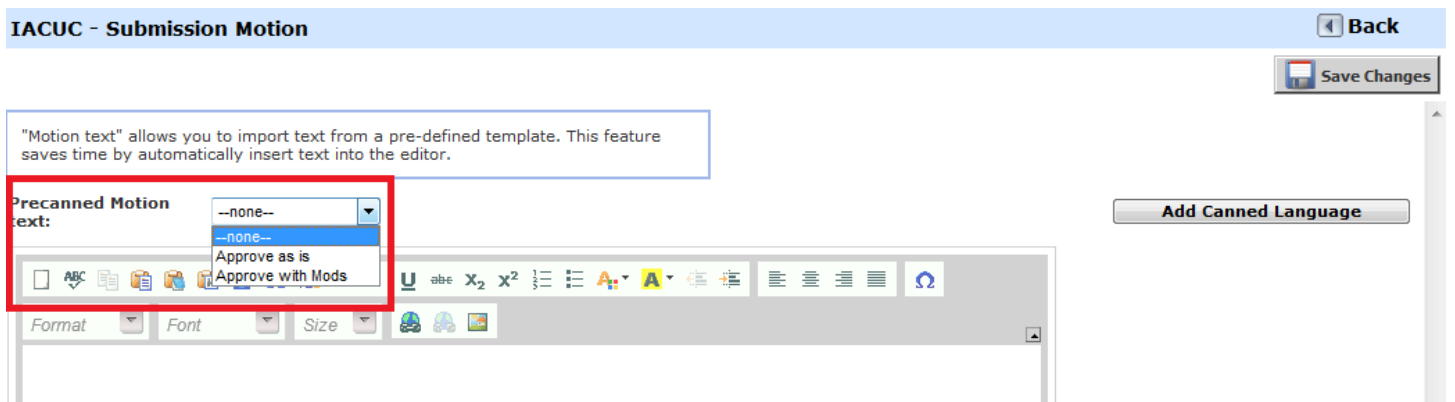


This will open a new page containing an embedded rich text editor. You can copy and paste or type in your canned motion text. Click the **OK** button when you are ready to add the text to your motion.

After adding the Name, Item Number and text for the canned motion, click the **Save Changes** button and the record will be added to the list of canned motions.

Canned motions can be edited by clicking on the **Edit** icon next to the name of the motion. This will open a new page allowing you to modify the Name, Item Number, and text for the canned motion.

You can delete a canned motion by selecting the checkbox next to the appropriate canned motion and clicking on the **Delete Selected Motion(s)** button.



Any canned motion added will display in the **Precanned Motion text** dropdown list when you are adding a motion to a submission on the Vote tab of the Submission processing screens.

## Setup Template Language

When you generate Minutes, Agendas, and Outcome Letters you have the ability to merge in template language. This is in case you have specific language you want to pull into multiple different documents. You can set up a list of template language under Setup Template Language and pull in any template language to your Minutes or Agenda or Outcome Letter as needed.

**IACUC - Template Language Setup** Back

+ Add a New Approved Text
✖ Delete Approved Text

List of template language

1 result(s) found...

	Edit	Name	Merge Code
<input type="checkbox"/>		Language 1	[%language1%]

When you open the page, a list of any template language defined will display. If templates have not yet been added, this page will not list any records.

You can click the **Add a New Approved Text** button to add new template language to the list.

**IACUC - Template Language Setup** Back

Save Approved Text

Add a language item.

\*Name:

\*Code:

[click here to add the language text](#) Approved Template Language

When you add a new template language, you will need to provide the **Name** of the template language and the **Code** (the merge code iRIS uses to insert language into a document). The Code must be alpha-numeric and cannot contain spaces or special characters. To add the content of the template language, click on the link '**Click here to add the language text**'.

**IACUC - Approved Template text** Back

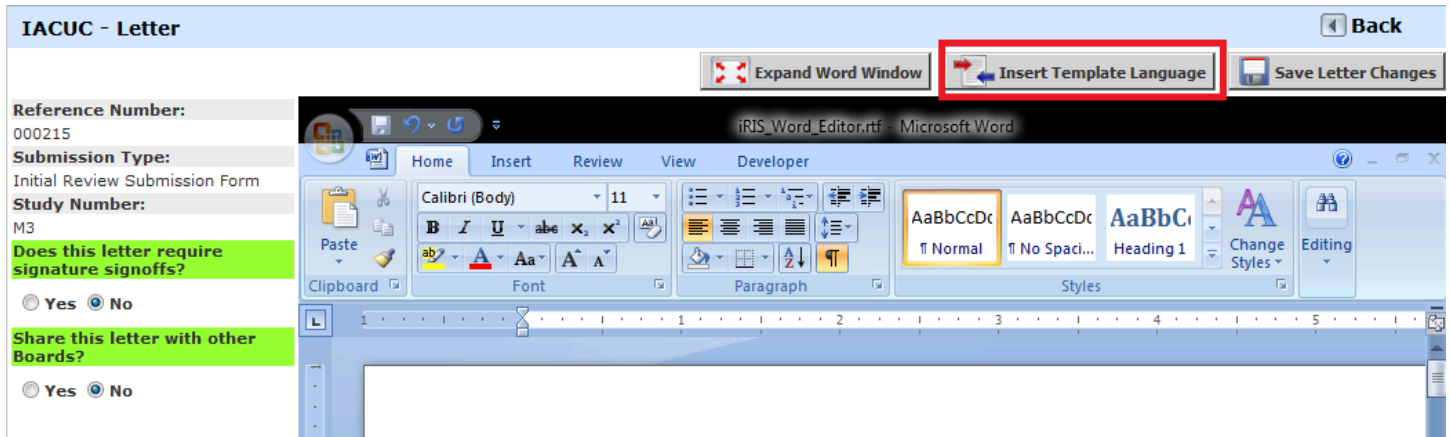
Save Change

The page displays an embedded Microsoft Word editor. The ribbon shows the Home tab with options for Font, Paragraph, and Styles. The main editing area contains the text "Template Language".

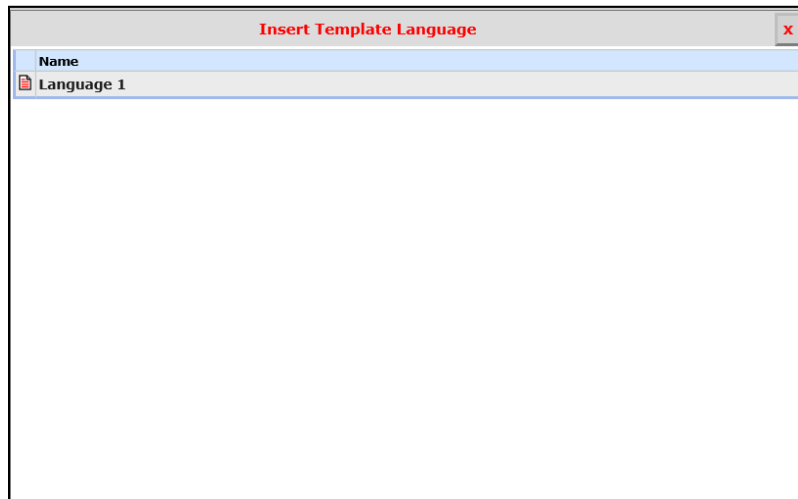
This will open a new page containing an embedded Word editor. You can copy and paste or type in your canned motion text. Click the **Save Changes** button when you are ready to add the text to your template language.

After adding the Name, Code, and text for the template language, click the **Save Approved Text** button and the record will be added to the list of template languages.

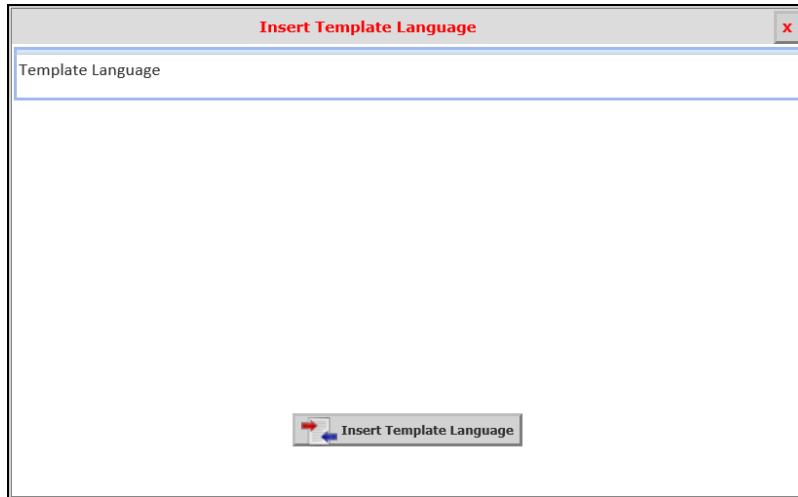
Template Language can be inserted into Outcome Letters, Meeting Minutes, and Meeting Agendas. Above the embedded Word editor of the generated letter, agenda, or minutes you will see an **Insert Template Language** button.



First, position your mouse cursor in the document where you would like to insert the language.



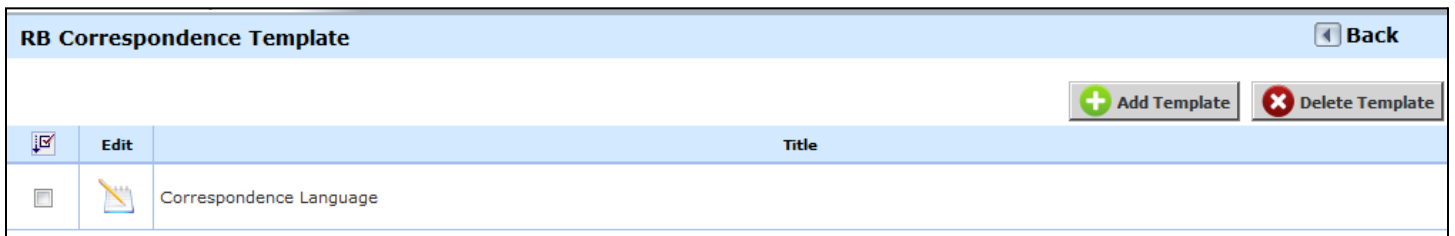
Clicking the **Insert Template Language** button will open a small popup window that will link to your list of template languages. Click on the language you wish to insert into the document.



The popup will refresh, displaying the text of the template language. You can highlight the text of the language and copy and paste it into your document, or you can click the **Insert Template Language** button. Doing this will close the popup window and insert your language into the document.

### Setup Correspondence Templates

You can set up templates that you can pull into correspondence generated for a submission. You can have any number of templates and pull any template into correspondence within the submission processing screens.



When you open the page, a list of any correspondence templates defined will display. If templates have not yet been added, this page will not list any records. You can click **Add Template** to add a new template to the list.

**RB Correspondence Template** Back

Insert Merge Code Save Template

\*Title: Correspondence Language

\*Content:

Normal (...) Font Size

[%today%]  
Correspondence Language 123

When you add a new template language, you will need to provide the **Title** of the template language. Beneath the Title field is an embedded rich text editor where you can copy and paste or type in the content of your correspondence template. You can also insert merge codes that will pull in specific information when the correspondence template is added to a specific submission. Click on the **Insert Merge Code** button for a list of available merge codes. To insert a merge code, position your mouse cursor in the document where you would like the code to be inserted, click the **Insert Merge Code** button, and click the code you want to insert.

When you are finished adding content to the correspondence template, click the **Save Template** button.

Study Number: M3  
PI: Investigator, Susan M., Ph.D.

**Submission Correspondence** Back

Ref Number: **000215** Study Title: Mouse Study

Study Status: Pending - Submitted for Initial Review

Save & Send Correspondence

\*Send Email

\*Subject

\*Recipient(s):

Additional Recipient(s):

Reply To(s):

Additional Reply To(s):

Attachments

Add Attachment

Template: Correspondence Language Import template

\*Content

Normal (...) Font Size

July 08, 2014  
Correspondence Language 123

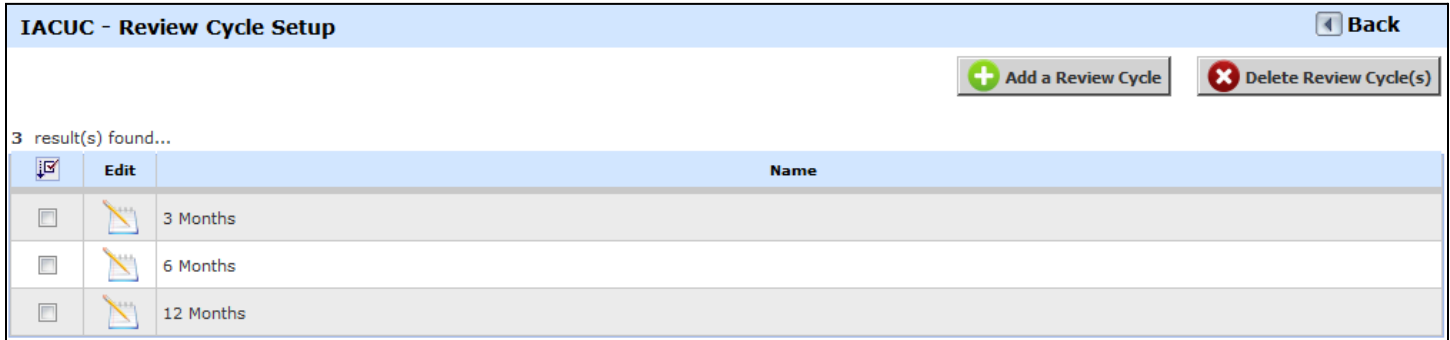
Correspondence Templates are used when you create a correspondence record for a submission within the submission processing screens. Above the embedded rich text editor, a dropdown will contain the available templates.

## Setup Review Cycle

You can create review cycles that can be used to calculate the expiration date on the Outcome tab of the submission processing screens. If you have an IACUC Submission Approval Date, the IACUC Expiration date can be calculated based on your pre-defined review cycles. Please note that the review cycle calculates based on 'x' number of months.

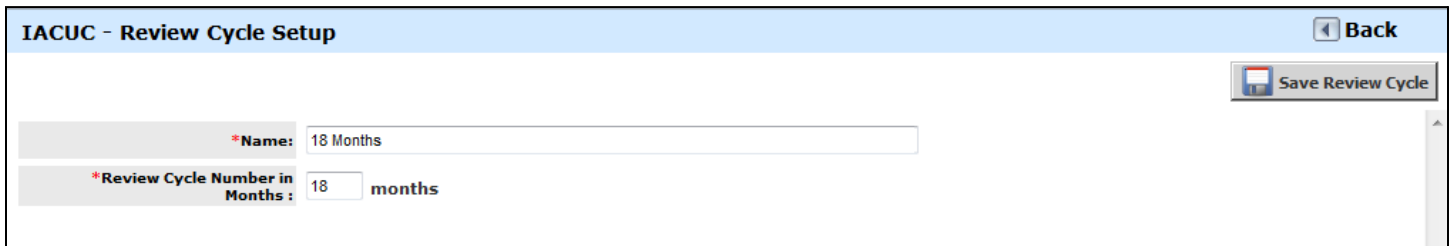
When you open the page, a list of any review cycles defined will display. If review cycles have not yet been added, this page will not list any records.

You can click **Add a Review Cycle** to add a new record to the list.

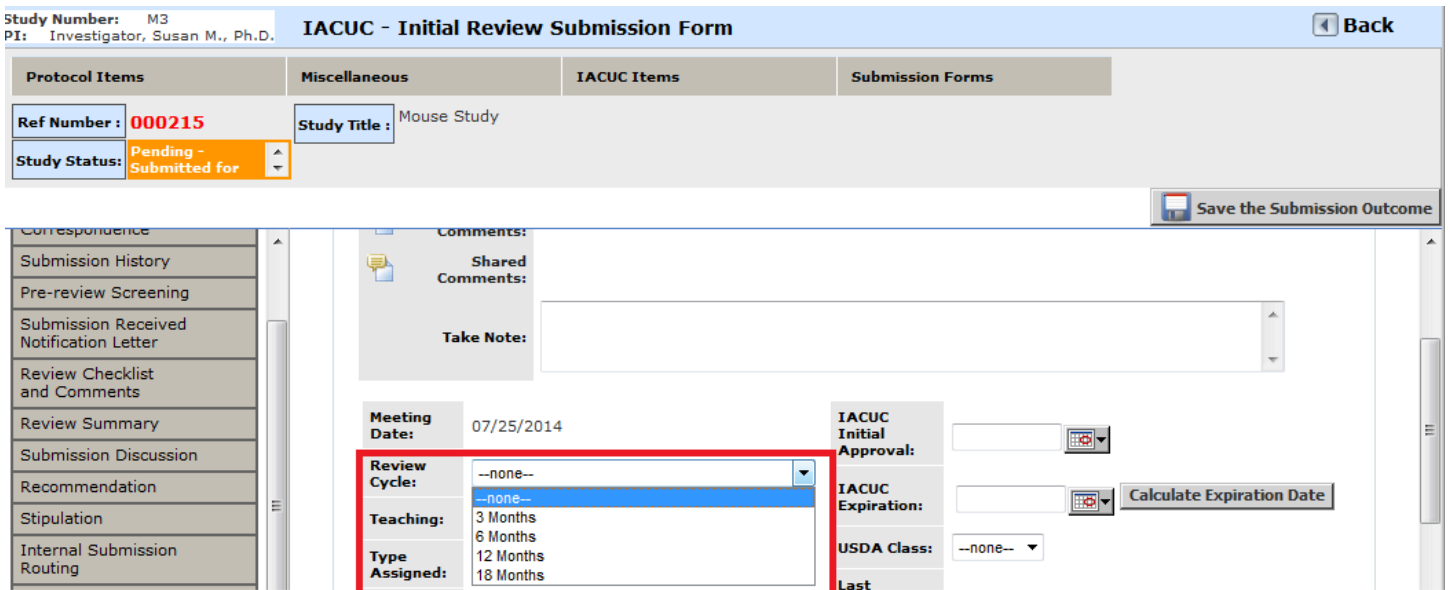


This will open a new page containing information related to the review cycle.

Enter the Name of the Review Cycle and the number of months in the **Review Cycle Number in Months** field. Click the **Save Review Cycle** button and the record will be added to the list of review cycles.



The Review Cycle is available in the Outcome tab within the Submission Processing screens. Once the approval information is entered, you may select a Review Cycle from the drop down list, as shown in the screenshot below.



Based on the Submission Approval date and the number of months associated to the Review Cycle selected, the IACUC Expiration will auto-populate.

**Submission Approval:** 07/01/2014

**Internal Comments:**

**Shared Comments:**

**Take Note:**

**Meeting Date:** 07/25/2014

**Review Cycle:** 12 Months

**Teaching:**  Yes  No

**IACUC Initial Approval:**

**IACUC Expiration:** 6/30/2015

**Calculate Expiration Date**

## Available to Purge

This area of Review Board Administration will populate with study records when they are ready to be archived in the database.

IACUC - Purge Study					
					Back
<b>Purge Selected Studies</b>					
List of studies available to purge					
3 result(s) found...					
<input checked="" type="checkbox"/>	IACUC Number	Study Title	Study Alias	Principal Investigator	Termination Date
<input type="checkbox"/>	1004-2304	10 year Swine Management and Production	Swine Management and Production	Susan M. Investigator	July 01, 2011
<input type="checkbox"/>	2004-2323	Mouse Study	Swine Management and Production	Susan M. Investigator	July 06, 2011
<input type="checkbox"/>	2005-1232	Swine Management and Production Phase IVX	Swine Management and Production	Susan M. Investigator	July 01, 2011

Studies can be archived and hidden from the user interface when certain conditions on the study are present. To archive a study, click the checkbox next to the record, and then click the **Purge Selected Studies** button. A popup box will open asking you to confirm the purge. If you confirm, the study will be removed from the list of studies available for purge. The study will also be removed from all study screens (Find a Study, My Studies, etc.) and will no longer be visible to any user. If you choose not to continue with the purge, the study will remain in the list of studies available to archive.

In order for a study to be available to purge, the following conditions must be in place for the study:

1. The study must belong to the IACUC board.
2. The study must be in a Study status that has the flag "Available to Archive" set.
3. The study must have a Termination Date set in the Study Profile that is 3 years prior to the date the study was set to the Study Status with the "Available to Archive" flag.

Once a study is purged, it will no longer be searchable in iRIS. The study will be kept in the database but will be flagged as deleted/archived.

## Review Board Notification Setup

Review Board Notifications can be set up to send to study personnel as well as to members of the board. These notifications include such notices as Reviewer Assignments and Letter Signoff notifications.

Notifications can all be set up in the same way, by entering the content of the email and using merge codes to pull in specific information. Start by clicking the button to **add a notification**.

**Edit Submission Notice** Back

Insert Merge Code Save Notification

**Title:** Submission Correction

**Send E-Mail Notification:**  Yes  No

**Send To:**  Principal Investigator  Study Contact

**E-mail Content:**

**Pre-Review Corrections Notification**

Study Title: "[%study\_title%]"  
IACUC Number: [%iacuc number%]

All notifications will require a Title. This will be the subject line of the email.

<b>Type of Notification:</b>	Reviewer Assignment Pending Reminder
<b>Title:</b>	Reviewer Assignment Pending Reminder
<b>Notify every ? Days</b>	5 in days.
<b>Send E-Mail Notification:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No

Certain notifications will require a number of days. This is typically how many days prior to a certain date you want the notification to send.



You will also be able to specify whether to send the email notification by selecting “Yes” or “No” in the **Send E-Mail Notification** column. If “Yes” is set, the notification will send to the recipient. If “No” is set, the notification will not send. You would set a notification to “No” if you do not want the notification to be sent by email but you do not want to delete it from the system.



## System Submission Setup



[Back](#)

List of Submission Types

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

List of Response Pending Notifications

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

	Edit	Type	Notification after ? Days	Title	Send E-mail Notification
<input type="checkbox"/>		Response Pending Notification	10 Days	Review Response Pending Notification 10 days	Yes

## Submission Types

These two notifications will generate and send when the review board requests changes. The Submission Correction notification will generate and send when the review board indicates there are pre-review changes. The Review Response notification will generate and send when the review board adds stipulations and sets the Submission Outcome to an outcome that will return to the study.

## Response Pending Notification

The Response Pending notification will send a certain amount of days after a submission has been returned to the study and works with the Review Response Request. This notification will send 'x' amount of days after the Review Response Request has been sent if the study has not responded.




## Continuing Review Notification Setup

The Continuing Review Notification will alert selected users of an upcoming Continuing Review. An e-mail will be sent out as specified in the screenshot below. There are currently three notifications set up: one to be sent 90 days prior to the expiration date, one 60 days prior, and one 30 days prior. These can be modified, deleted, and new notifications can be added.

## Continuing Review Notification Setup

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



List of Continuing Review Notifications

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

The notifications will be sent out in the amount of days specified before the Review Board Expiration Date set for the study by the IACUC in the Outcome Tab.

## Expiring Study Notification

The Expiring Study Notification is sent to selected iRIS users once a study has expired.

RB Expiring Study Notification <span style="float: right;">Back</span>				
Edit	Type	Title	Send E-mail Notification	Action
	Expiring Study Notification	Your Study has Expired [%irb_number%]	Yes	 Delete Notification

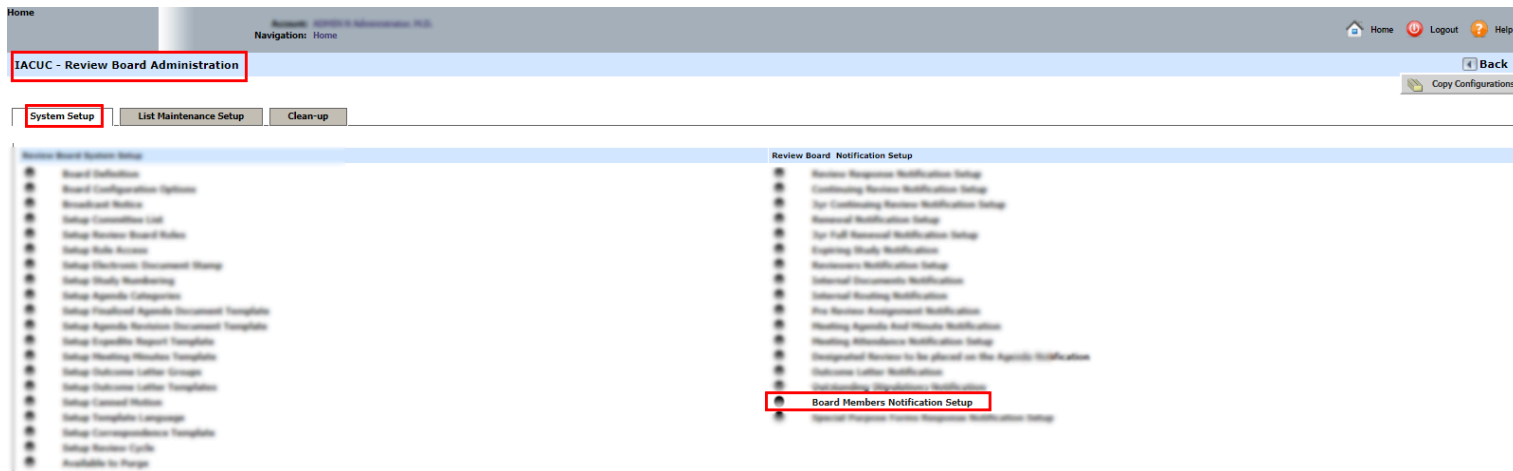
## Renewal Notification

This notification will generate based on your IACUC study expiration date, and it will be sent out when your entire study is about to expire.

## Board Members Notification Setup

IACUC study notifications can be sent to the entire board committee, other than assigned reviewers.

To setup this functionality, System Administrators can navigate to: IACUC Assistant > Review Board Administration > System Setup. There will be a setup configuration called: Board Members Notification Setup. Clicking on the Board Members Notification Setup, then clicking “Edit”, and selecting “Yes” to the field “Send E-mail Notification”, gives board members the ability to send notifications to just the board members added to the submission.



The screenshot shows the IACUC Assistant interface. At the top, there is a navigation bar with 'Home', 'Logout', and 'Help' links. Below this, a breadcrumb trail reads 'IACUC - Review Board Administration'. Underneath, there are three tabs: 'System Setup', 'List Maintenance Setup', and 'Clean-up'. The 'System Setup' tab is active, displaying a list of configuration options. On the right side of this list, 'Board Members Notification Setup' is highlighted with a red box. Other visible options include 'Board Definition', 'Board Configuration Options', 'Board Mailer', 'Setup Committee List', 'Setup Review Board Roles', 'Setup Role Access', 'Setup Electronic Document Storage', 'Setup Study Numbering', 'Setup Agency Categories', 'Setup Proposal Agency Document Template', 'Setup Agency Review Document Template', 'Setup Agency Report Template', 'Setup Meeting Minutes Template', 'Setup Distance Letter Group', 'Setup Distance Letter Template', 'Setup Consent Motion', 'Setup Template Language', 'Setup Consent/Action Template', 'Setup Review Cycle', and 'Available to People'. On the right side of the screen, there is a 'Review Board Notification Setup' section with various sub-options, including 'Board Members Notification Setup', which is also highlighted with a red box.

When reviewing the submission, board members can navigate to the “Pre-review Screening” tab, select “Assign to Review Committee Agenda”, and then select a “Committee Name”. After this a “Send Full Board Review Notification” button will appear. After selecting this button, the notification will be sent to all full board members. A full board member is a board member who appears under “User Management > Grant User Access > Define Roles, and whom also has “Board Member” as a role.

**IACUC - Initial Review Submission Form**

Navigation: Home > submissions

IACUC Number: IACUC 2017-0827

**Pre-review Screening**

Determine Review Process

- Not Assigned
- Assign to Review Committee Agenda
  - Committee Name: IACUC
  - Upcoming Meeting Date: 02/19/2018 or [click here to select past meetings](#)
  - Agenda Category: New Business - Modifications
- Facilitated Review
- Designated Reviewer
- Pre-Review Forward to another Board/Committee
- Pre-Review changes requested
- Process Administratively

Assign Reviewers

[Send Full Board Review Notification](#) [Add Comments for All Reviewers](#) [Add Reviewer](#) [View Reviewers Workload](#)

Reviewer Role	Reviewer	Completed ?	Has COI?	Date Notified	Date Completed
AWO Pre-Review	choudhari, Hemant1	No	No	10/23/2017	

## Reviewers Notification Setup

Reviewers Notifications are programmed to send to the assigned reviewers of a submission. There is also a notification you can set up to let the assigned analyst of a submission know when reviewers have completed their review.

## Reviewers Complete Notification















This notification will trigger and send to the assigned analyst when reviewers have completed their reviews for a submission.

### List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Reviewers Complete Notification	Reviewer Notification	Yes	Delete Notification

## Reviewer Assignment Notifications

These notifications will generate and send to an assigned reviewer based on the review process of the submission. You can also set up a notification to send to the reviewer if they have been removed from the review.

List of Reviewer Assignment Notifications				
Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment Notification	Yes	 Delete Notification
	Expedited Reviewer Assignment Notification	Expedited Reviewer Assignment Notification	Yes	 Delete Notification
	Designated Reviewer Assignment Notification	Designated Reviewer Assignment Notification	Yes	 Delete Notification
	Designated Review Member Assignment Notification	Designated Review Member Assignment Notification	Yes	 Delete Notification
	Exempt Reviewer Assignment Notification	Exempt Reviewer Assignment Notification	Yes	 Delete Notification
	Process Administrative Reviewer Assignment Notification	Process Administrative Reviewer Assignment Notification	Yes	 Delete Notification
	Reviewer Unassignment Notification	Reviewer Unassignment Notification	Yes	 Delete Notification

### Agenda Reviewer Assignment Notification

This notification will send to a full board reviewer. Note that you must also have Enable Reviewer Notifications set to “Yes” for the Meeting Date in Meeting Manager before any full board review notifications will send.

### Expedited Reviewer Assignment Notification

This notification will send to an expedited reviewer as soon as you assign them to review the Submission.

### Designated Reviewer Assignment Notification

This notification will send to a Designated Reviewer as soon as you assign them to review the Submission that has been assigned the review process “Designated Reviewer.”

### Designated Review Member Assignment Notification

This notification will send to a board member who has been assigned to a Designated Member Review for a submission.

### Exempt Reviewer Assignment Notification

This notification will send to an exempt reviewer as soon as you assign them to review the submission.

### Process Administrative Reviewer Assignment Notification



This notification will send to an administrative reviewer as soon as you assign them to review the Submission.

### Reviewer Unassignment Notification

This notification will send if you delete a reviewer assignment task.



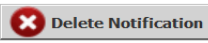


### Reviewer Assignment Reminder

You can set up a notification that will send out every time a specified number of days after the review assignment has passed to remind the reviewer of their task.

List of Reviewer Assignment Reminders					
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Notify every 5 Days	Reviewer Assignment Pending Reminder	Yes	

## Internal Routing Notification

These notifications will send to a user assigned an Internal Routing task and also to the Assigned Analyst when an Internal Routing task is completed.

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

## Internal Routing Assignment Notification










This notification sends to a user assigned an Internal Routing task.

## Internal Routing Complete Notification

This notification will send to the assigned analyst when all assigned users have completed their Internal Routing tasks for a submission.

## Pre Review Assignment Notification

The Pre-Review Assignment Notifications will send an e-mail to the study when a submission has been assigned a certain review process. Each notification listed on this page matches a process in the Pre-Review Screening tab of the Submission Processing screens.

Prereview Notification Setup					 Back
Edit	Type	Title	Send E-mail Notification	Action	
	Prereview Agenda Assignment Notification	Submission Placed on Meeting for Full Board Review	Yes		
	Prereview Expedite Notification	Submission Processed as Expedited	Yes		
	Prereview Exempt Notification	Submission Processed as Exempt	Yes		
	Prereview Administrative Notification	Submission Administratively Processed	Yes		

## Pre Review Agenda Assignment Notifications

The Pre Review Agenda Assignment Notification is sent when a submission has been placed on the agenda for full board review.



### Revised Meeting Agenda Notification

This notification will generate when you send a published Revised Meeting Agenda for a specific meeting date in the Meeting Manager. It will attach the PDF Meeting Agenda Revision and send to all committee board members.

### Final Meeting Minute Notification

This notification will generate when you send the published Meeting Minutes for a specific meeting date in the Meeting Manager. It will attach the PDF Meeting Minutes and send to all board members present at the meeting.

### Draft Meeting Minute Notification

This notification will generate when you send a copy of the Draft Meeting Minutes for a specific meeting date in the Meeting Manager. It will attach the PDF Draft Meeting Minutes and send to all board members present at the meeting.



### Meeting Attendance Notification

You can set up notifications that will send to board members a certain amount of days prior to a meeting date, asking them to log in to the system and set their meeting availability. You can also set up a notification that will send to the board Coordinators if any member changes their availability within a certain amount of time prior to a meeting date.


**Meeting Attendance Notification Setup** ⏪ Back

+ Add a New Notification
✖ Delete Notification(s)

**List of Meeting Attendance Notifications**

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
		Meeting Attendance Notification	14 Days	Meeting Attendance Notification	Yes

**List of Member Attendance Change Notification**

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Change Notification	Yes	<span style="border: 1px solid gray; padding: 2px 10px; background-color: #e6f2ff; display: inline-block;">✖ Delete Member Attendance Change Notification</span>

### Meeting Attendance Notifications

If you would like to send notifications to board members to alert them to set their availability for upcoming meetings, you can set up reminders here. These notifications will send a certain amount of days prior to a meeting date to let the member know they need to set their availability. You can have any number of notifications set up.

### Member Attendance Change Notification







This notification will send to the board Coordinators a certain amount of time prior to the meeting date if any member has changed their availability.

### Designated Review to be placed on the Agenda Notification

This notification will send to the submission's assigned analyst when the assigned Designated Reviewer indicates that a submission is recommended for full board review.

## Outcome Letter Notification

Notifications related to Outcome Letters are set up here. These notifications send to Outcome Letter recipients, to users assigned to sign an Outcome Letter, and to alert analysts that signoffs on letters have been completed.

RB Outcome Letter Notification <span style="float: right;">← Back</span>				
<b>List of RB Outcome Letter Notifications</b>				
Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	IACUC Outcome Letter (attachment)	Yes	 Delete Outcome Letter Notification
<b>List of Outcome Signoff Letter Notifications</b>				
Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Signoff Letter Notification	IACUC Outcome Letter Signoff Required	Yes	 Delete Outcome Signoff Letter Notification
<b>List of Outcome Signoff Complete Notifications</b>				
Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Signoff Complete Notification	IACUC Outcome Letter Signoff Complete	Yes	 Delete Outcome Signoff Complete Notification

### Outcome Letter Notification

This is the notification that will generate and send to selected recipients when you send an Outcome Letter. This notification will attach the PDF Outcome Letter.

### Outcome Signoff Letter Notification

This is the notification that will generate and send to a user assigned to sign off on an Outcome Letter.

### Outcome Signoff Complete Notification

This is the notification that will generate and send to an assigned analyst when all signoff tasks for the letter have been completed.

### Outstanding Stipulations Notification

These notifications are sent to the PI, Study Contact, and Assigned Analyst on the defined number of days before the follow up due date defined by the review board for a specific stipulation. There are three notifications shown below as examples in this group of notifications. One is designed to be sent one day before the due date of the stipulation, and the others are designed to be sent five days and 30 days before the due date of the stipulation. These notifications will not be sent if the Review Board has closed the stipulation and assigned a Date Closed prior to the day the notification would be triggered.

Outstanding Stipulations Notification Setup <span style="float: right;">Back</span>					
<span style="margin-right: 20px;">+ Add a New Notification</span> <span>✖ Delete Notification(s)</span>					
List of Outstanding Stipulations Notifications					
	Edit	Type	Notification prior to due date	Title	Send E-mail Notification
<input type="checkbox"/>		Outstanding Stipulations Notification	30 Days	Outstanding Stipulation	Yes
<input type="checkbox"/>		Outstanding Stipulations Notification	5 Days	Outstanding Stipulation	Yes
<input type="checkbox"/>		Outstanding Stipulations Notification	1 Days	Outstanding Stipulation	Yes

When the review board defines a stipulation, the stipulation type “Comments that must be addressed” causes the Follow-up Due field to appear. The notification will fire based on the Follow-Up Due date provided for the stipulation.

<span style="float: right;"> <span style="margin-left: 10px;">+ Add Multiple</span> <span style="margin-left: 10px;">+ Add New</span> <span style="margin-left: 10px;">+ Add Pre-defined</span> <span style="margin-left: 10px;">Save Stipulation</span> </span>																							
<ul style="list-style-type: none"> <li>Review Summary</li> <li>Submission Discussion</li> <li>Recommendation</li> <li><b>Stipulation</b></li> <li>Internal Submission Routing</li> <li>Outcome</li> </ul>	Stipulations to be sent for Response <span style="float: right;">?</span> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Delete</th> <th>Edit</th> <th>Sorting Number</th> <th>Stipulation Type</th> <th>Follow-up Due</th> <th>Stipulation</th> <th>Requested By</th> <th>Link To Component</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">✖</td> <td style="text-align: center;"></td> <td style="text-align: center;">1</td> <td>Comments that must be addressed</td> <td style="text-align: center;">11/18/2016</td> <td>Revise study document.</td> <td>Created By: Ann Analyst Edited By: Ann Analyst</td> <td style="text-align: center;"></td> </tr> </tbody> </table>							Delete	Edit	Sorting Number	Stipulation Type	Follow-up Due	Stipulation	Requested By	Link To Component	✖		1	Comments that must be addressed	11/18/2016	Revise study document.	Created By: Ann Analyst Edited By: Ann Analyst	
Delete	Edit	Sorting Number	Stipulation Type	Follow-up Due	Stipulation	Requested By	Link To Component																
✖		1	Comments that must be addressed	11/18/2016	Revise study document.	Created By: Ann Analyst Edited By: Ann Analyst																	

If the study returns the submission correction form with the stipulations addressed and the review board takes an action and assigns a Date Closed before the day that the notification has been set up to send out, then the notification will not be triggered.

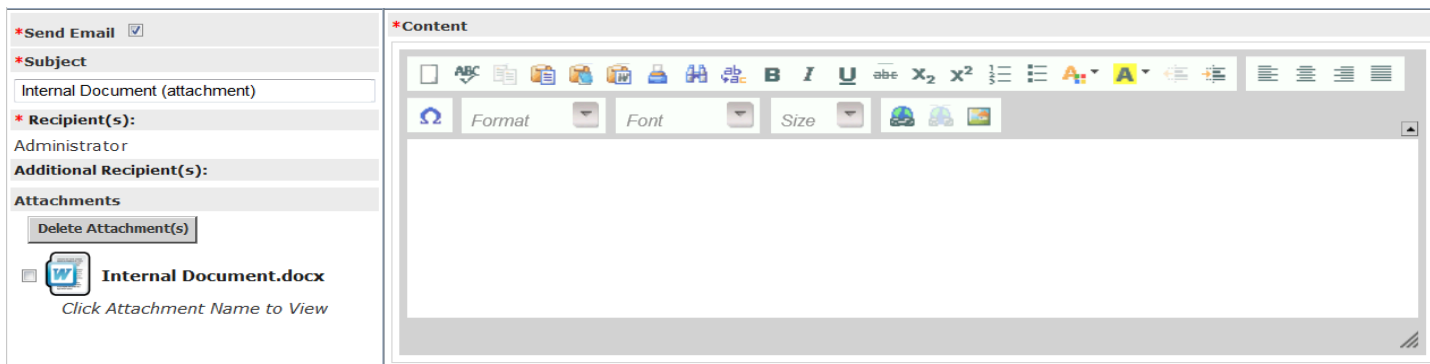
### Internal Documents Notification

The review board has the ability to upload documents to a study record that are specific to the study and internal to the review board. When documents are uploaded, you have the ability to email that document to another user of the system. Notifications defined here will attach the uploaded document and send to the selected recipient.

Internal Document Notification <span style="float: right;">Back</span>				
Edit	Type	Title	Send To	Action
	Internal Document Notification	Internal Document (attachment)	Administrator	<span>✖ Delete Notification</span>

From this page you will be able to add the title and define the recipients for the notification.

The recipient of this notification is specified within the notification template, or any additional recipients can be manually added at the time you send the notification. The screenshot below shows an example of a template about to be sent from a study within the review board. The Recipients column pulled in the recipient as defined in the notification setup, and you can manually add additional recipients here.



The notification will send when you access Internal Documents within a study record within the review board. Select the checkbox next to the document you wish to send and then click the **Send Email** button.

This will cause the Internal Documents Correspondence page to open. You can type in content for the notification, change the recipient list, or change the Subject line for the email. When you are done and ready to send the notification, click on the **Save & Send Correspondence** button.

## List Maintenance Setup

List Maintenance Setup contains a list of configurable dropdown lists available for you to setup. Most of these configuration lists are specific to the IACUC module, but some lists are shared with other review boards and will be noted as such.

## Animal Species Configuration List

The Animal Species Configuration List allows you to define the list of species for your institution. Species added to this list can then be pulled in to specific studies.

When you open the Animal Species Configuration List, any current species will be listed. If you want to find a specific Species in this list, you can use the **Species Browse / Find** field to type in part or all of the Species Name. Click the **Find** button to filter your results.

System Species List <span style="float: right;">Back</span>					
Species Browse/Find:			Species Name: <input type="text"/>	<input type="button" value="Find ..."/>	<input type="button" value="Merge Species Records"/> <input type="button" value="Add a New Species"/>
4 result(s) found...					
Delete	Edit	Species Name	Scientific Name	Is USDA Species	Category Type
		Mouse	Mus musculus	Yes	
		Parakeet	Melopsittacus undulatus	Yes	
		Pig	Sus	Yes	
		Rat	Rattus norvegicus	Yes	

To delete any unnecessary Species, click the icon in the **Delete** column. If you need to delete a Species because it is already listed as a separate record, it is recommended that you use the **Merge Species Record** feature so that the records are combined and any study records using the unwanted Species will update with the correct Species.

### Merge Species

Listed at the top of the page is the **Merge Species Records** button. This will allow you to manage your list of species by merging duplicate records into one record as needed. Users adding species to a study are able to add a species to the master list if they cannot find the species they need on the study. Merging species allows you to manage the list of user-added species in the case that a species already exists in the master list. To merge species records, click the **Merge Species Records** button.

System Species Merge						Back
						Merge Selected Records
<b>Select two or more records to merge.</b>						
<input type="checkbox"/>	Internal Rec Num	Species Name	Scientific Name	Common Name	Category Type	
<input type="checkbox"/>	5	Mice	Mice	Mice		
<input type="checkbox"/>	1	Mouse	Mus musculus	Mouse		
<input type="checkbox"/>	4	Parakeet	Melopsittacus undulatus	Parakeet		
<input type="checkbox"/>	3	Pig	Sus	Pig		
<input type="checkbox"/>	2	Rat	Rattus norvegicus	Rat		

A new page will open, listing the available species. Choose two or more records to merge, and then click the **Merge Selected Records** button.

System Species Merge					Back
					Merge Cancel
<b>Select the record you want to keep after merging.</b>					
	Species Name	Scientific Name	Common Name	Category Type	
<input checked="" type="radio"/>	Mouse	Mus musculus	Mouse		
<input type="radio"/>	Mice	Mice	Mice		

The page refreshes to list only the species you selected. At this point, you need to indicate which species record to keep by selecting the radio button next to the Species Name. Then, click the **Merge** button. If you do not want to merge any records, click the **Cancel** button and you will be returned to the previous page.

When you merge two or more records, the species you selected to keep will remain in the master configuration list and will also be applied to any study records using the other species' records. Example: the above case is merging two species, "Mouse" and "Mice." The correct species in the master list is "Mouse;" however, a user added "Mice" to a study, and the species record was created in the master list. When these two records are merged, "Mice" is no longer found in the master list and is replaced by "Mouse" within the study that had referenced "Mice."

## Adding Species to the Master List

If you need to add a Species to the configuration list, click the **Add a New Species** button. A new page will open, allowing you to input information about the species. Species Name, Scientific Name, and Common Name are required fields. Category Type is optional. When you are finished entering the necessary information, click the **Save Changes** button.

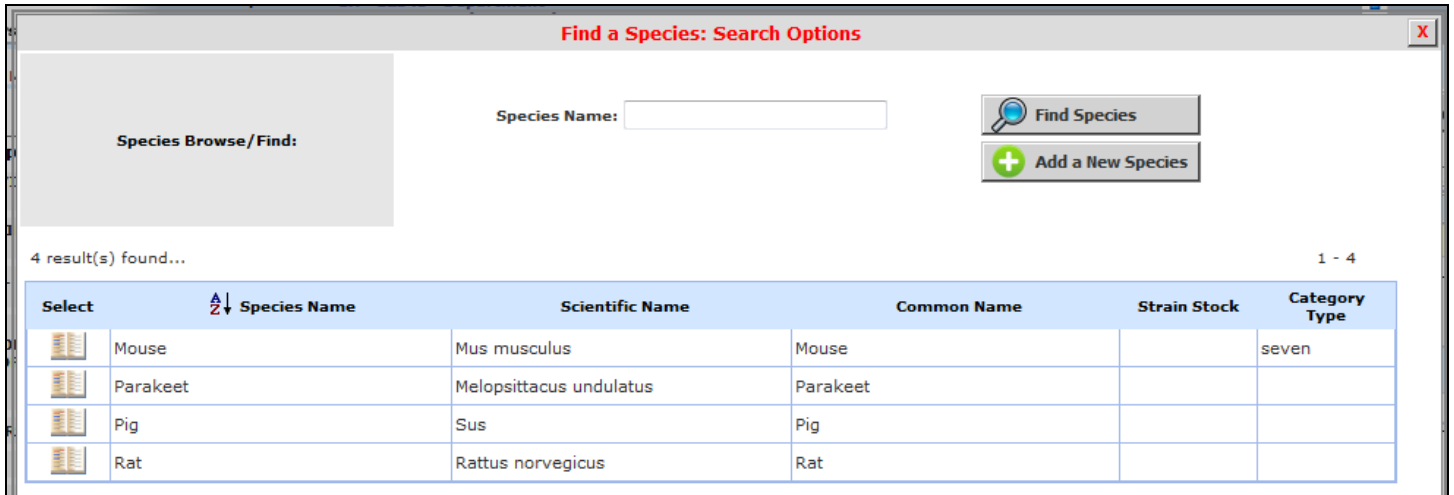
Any Species you add will then be added to the configuration list.

## Functionality

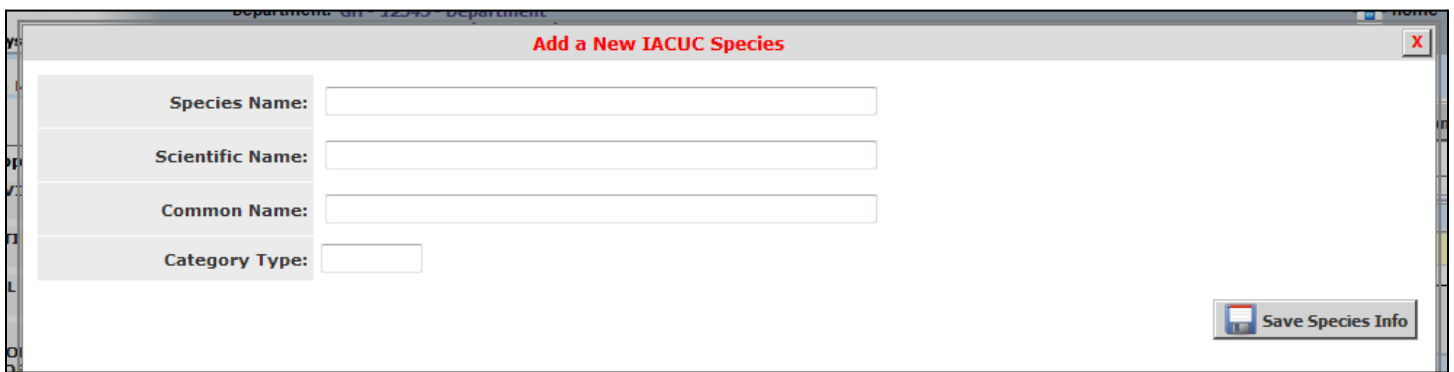
Any Species added to the Animal Species Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the selection of the species, as shown in the screenshot below. The user can click the **Add a New Species to the Study** button.

A window will open within the browser, allowing the user to search the system for the appropriate species. The user can use the **Species Name** field to find a particular species; otherwise, leaving that field blank and clicking the **Find Species** button will return all results.

If the desired species is not found in the list, the user has the option to add a species by clicking on the **Add a New Species** button.

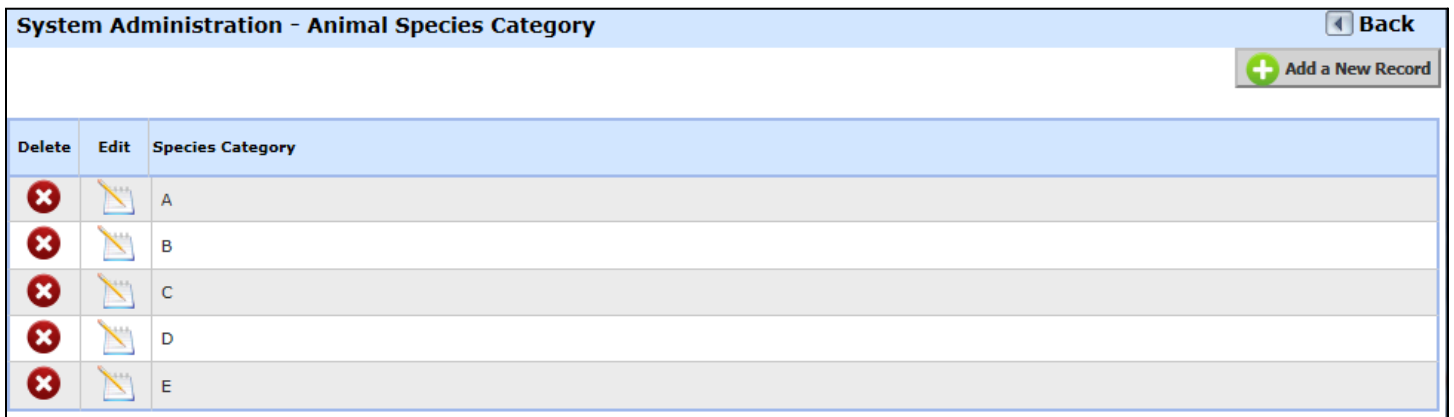


The window will change, allowing the user to input the same species information gathered when adding a species through the Animal Species Configuration List. Once the necessary information is added, the user will click on the **Save Species Info** button and the Species will be added to the study as well as the Animal Species Configuration List.



### Animal Species Category Configuration List

This configuration list will allow you to specify a pre-defined list of Species Categories that you can then associate with a Species record in the Animal Species Configuration List.



When you open the page, a list of any Species Category previously defined will display. If categories have not yet been added, this page will not list any records. You can click the **Add a New Record** to add a new Animal Species Category to the list.

When you add a new record, you will need to provide the **Species Category** name and then click the **Save Record** button. The record will be added to the list of Animal Species Categories.

Records can be edited by clicking on the **Edit** icon next to the name of the category. This will open a new page, allowing you to modify the Species Category.

You can delete a record by clicking the **Delete** icon next to the record name.

## Animal Species Sex Configuration List

This configuration list will allow you to specify a pre-defined list of Animal Species Sex that you can then associate to a species within a study record.

Delete	Edit	Species Sex
		Female
		Male

When you open the page, a list of any Animal Species Sex previously defined will display. If records have not yet been added, this page will not list any records. You can click the **Add a New Record** to add a new Animal Species Sex to the list.

When you add a new record, you will need to provide the **Species Sex** and then click the **Save Record** button. The new record will be added to the list of Animal Species Sex.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Animal Species Sex.

You can delete a record by clicking the **Delete** icon next to the record name.

The Species Sex information is available to end users when adding a species to a study. The screenshot below displays a screen that captures additional study-specific Animal Species detail, with the Species Sex dropdown list highlighted.

Study IACUC Species Details:





<b>Species Name:</b>	Mouse
<b>Scientific Name:</b>	Mus musculus
<b>Common Name:</b>	Mouse
<b>* Sex:</b>	<div style="border: 2px solid red; padding: 2px;"> --none--  --none--  Both  Female  Male </div>
<b>* Age:</b>	<input type="text"/>
<b>* Weight:</b>	<input type="text"/>

## Animal Procedure Type Configuration List

This configuration list will allow you to specify a pre-defined list of Animal Procedure Types that you can then associate to a study record.

**Setup Animal Procedure Type** ◀ Back

+ Add a New Procedure Type
✖ Delete Procedure Type(s)

	Edit	Procedure Type
<input type="checkbox"/>		Veterinarian Care
<input type="checkbox"/>		Surgery
<input type="checkbox"/>		Procedure
<input type="checkbox"/>		Treatment

When you open the page, a list of any Animal Procedure Types previously defined will display. If records have not yet been added, this page will not list any records. You can click the **Add a New Procedure Type** button to add a new Animal Procedure Type to the list.

**Setup Animal Procedure Type** ◀ Back

➔ Return to List
💾 Save Procedure

**\*Procedure Type:**

When you add a new record, you will need to provide the **Procedure Type** and then click the **Save Procedure** button. The record will be added to the list of Animal Procedure Types.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Procedure Type.

You can delete a record by selecting the checkbox next to the appropriate Procedure Type and clicking on the **Delete Procedure Type(s)** button.

### Animal Procedure Configuration List

This configuration list will allow you to specify a pre-defined list of Animal Procedures that you can then associate to a specific species, and then pull that information into a study. You can also capture billing information related to these procedures.

**System Procedure List** ◀ Back

+ Add a New Procedure
✖ Delete Procedure(s)

Species Name: 
 Procedure Name: 
Search

9 result(s) found... 1 - 9

<input checked="" type="checkbox"/>	Edit	Species Name	Is USDA Species	Procedure Name	Procedure Type	Is Billable	Billing Code	Cost	Administrative Cost
<input type="checkbox"/>		Mouse	Yes	Adrenal demedullation	Surgery	Yes	1345	\$250.00	\$25.00
<input type="checkbox"/>		Mouse	Yes	Carotid artery catheterization - cranial dosing model	Surgery	Yes	1981621	\$500.00	\$50.00
<input type="checkbox"/>		Mouse	Yes	Jugular vein catheterization	Surgery	Yes	6451651	\$250.00	\$25.00
<input type="checkbox"/>		Mouse	Yes	Recovery	Treatment	Yes	124	\$50.00	\$50.00
<input type="checkbox"/>		Mouse	Yes	Surgery Prep	Procedure	Yes	987654	\$50.00	\$50.00

When you open the page, a list of any Animal Procedures previously defined will display. If records have not yet been added, this page will not list any records. You can click the **Add a New Procedure** to add a new Animal Procedure to the list.

**System Procedure List** ◀ Back

➡ Return to List
💾 Save Procedure

Add a new animal procedure.

**\*Species Name:**

**\*Procedure:**

**Procedure Type:**

**Procedure Description:**

**Is Billable:**  Yes  No

**Billing Code:**

**Cost:**

**Administrative Cost:**

When you add a new record, you will then be able to specify the details for that procedure. Fields marked with an asterisk denote a required field.

**Species Name** – This dropdown list will contain the species defined in the Animal Species Configuration List. You must choose which species the Procedure applies to. If you have a Procedure that applies to more than one species, you can add additional records with the same information, but associate a different species.

**Procedure** – This is the name of the Procedure.

**Procedure Type** – This drop down list will contain the Procedure Types defined in the Animal Procedure Type Configuration List. This allows you to categorize your Procedures.

**Procedure Description** – This field allows you to describe the Procedure, if necessary.

**Is Billable** – Select “Yes” if the Procedure is billable. This will allow you to flag a Procedure for billing (if using the ARC Module). If a Procedure is not billable, leave this option set to “No.”

**Billing Code** – If the Procedure is billable, you may enter the Billing Code in this field.

**Cost** – If the Procedure is billable, you may enter the Cost of the Procedure in this field.

**Administrative Cost** - If the Procedure is billable, you may enter the Administrative Cost of the Procedure in this field.

Once you enter the necessary information, click the **Save Procedure** button.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the details related to the Procedure.

You can delete a record by selecting the checkbox next to the appropriate Animal Procedure and clicking on the **Delete Procedure(s)** button.

Any Procedure added to the Animal Procedures Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the selection of the procedures, as shown in the screenshot below. The user can click the **Add a New Procedure to the Study** button.

Delete Procedure	View Description	Species	Is USDA Species	Procedure Type	Procedure Name
No Procedures have been added to this Study					

A window will open within the browser, allowing the user to search the system for the appropriate Procedure. The user can use the **Procedure Type** drop down list and the **Procedure Name** field to find a particular Procedure; otherwise, leaving that field blank and clicking the **Find Procedure** button will return all results.

Note: If more than one Species is specified on the study, the **Species Name** field in the filters will be presented as a drop down list, allowing you to filter the results based on the desired Species.

**Find a Procedure: Search Options**

**Procedure Browse/Find:**

Species Name: Mouse  
 Procedure Type: --none--  
 Procedure Name:

6 result(s) found... 1 - 6

Select	Species Name	Is USDA Species	Procedure Type	Procedure Name
	Mouse	Yes	Procedure	Surgery Prep
	Mouse	Yes	Treatment	Recovery
	Mouse	Yes	Procedure	Surgical Records
	Mouse	Yes	Surgery	Carotid artery catheterization - cranial dosing model
	Mouse	Yes	Surgery	Jugular vein catheterization
	Mouse	Yes	Surgery	Adrenal demedullation

You can select a Procedure to add to the study by clicking on the icon in the **Select** column.

**Animal Procedures**

Add a New Procedure to the Study

Delete Procedure	View Description	Species	Is USDA Species	Procedure Type	Procedure Name
		Mouse	Yes	Surgery	Carotid artery catheterization - cranial dosing model
		Mouse	Yes	Procedure	Surgical Records

The selected Procedure will display within the form. You can remove the Procedure by clicking on the icon in the **Delete Procedure** column. You can view additional details related to the procedure by clicking on the icon in the **View Description** column.

Procedures added to the study can also be pulled in to the Procedure Summary data value, as shown in the screenshot below. Note: The Procedures listed here are only Procedures that have been added to the study first.

Procedures Summary

	Species	Strain	Procedure Name	Pain Category	Group Number	Number of Animals
<input type="checkbox"/>	Mouse		--none--	--none--		0
			Carotid artery catheterization - cranial dosing model			
			Surgical Records			
Total Number of Animals						0

If using the Experiment Data Value, the Procedures listed on the study will also display for Common Procedures and Variable Procedures, as shown in the screenshot below.

**Study Experiment Details:**

Justify the Purpose of the Experiment:

Select the Common Procedures (applied to all animals):

Select the Variable Procedures (applied to some animals or differently):

Procedure Name	Procedure Category	Procedure Type
--none--		
Carotid artery catheterization - cranial dosing model		
Surgical Records		

Procedure Name	Procedure Category	Procedure Type
--none--		

## Animal Service Type Configuration List

This configuration list will allow you to specify a pre-defined list of Animal Service Types that you can then associate to a study record.

**Setup Animal Service Type** Back

+ Add a New Service Type
 ✖ Delete Service Type(s)

<input checked="" type="checkbox"/>	Edit	Service Type
<input type="checkbox"/>		Supplies
<input type="checkbox"/>		Housing
<input type="checkbox"/>		General Care
<input type="checkbox"/>		Equipment

When you open the page, a list of any Animal Service Types previously defined will display. If records have not yet been added, this page will not list any records. You can click the **Add a New Service Type** to add a new Animal Service Type to the list.

**Setup Animal Service Type** Back

Return to List
Save Service

\*Service Type:

When you add a new record, you will need to provide the **Service Type** and then click the **Save Service** button. The record will be added to the list of Animal Service Types.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Service Type.

You can delete a record by selecting the checkbox next to the appropriate Service Type and clicking on the **Delete Service Type(s)** button.

## Animal Service Configuration List

This configuration list will allow you to specify a pre-defined list of Animal Services that you can then associate to a specific species, and then pull that information into a study. You can also capture billing information related to these services.

**Animal Service List** ◀ Back

+ Add a New Service
✖ Delete Service(s)

Species Name: 
Search

4 result(s) found... 1 - 4

<input checked="" type="checkbox"/>	Edit	Species Name	Is USDA Species	Service Name	Service Type	Is Billable	Billing Code	Cost	Administrative Cost
<input type="checkbox"/>		Mouse	Yes	Aging	General Care	Yes	651651	\$500.00	\$50.00
<input type="checkbox"/>		Mouse	Yes	Breeding Service	General Care	Yes	1412341	\$85.00	\$10.00
<input type="checkbox"/>		Mouse	Yes	Diet-Induced Obesity Model	General Care	Yes	2651651	\$500.00	\$25.00
<input type="checkbox"/>		Mouse	Yes	Timed-Pregnancy	General Care	Yes	12323423	\$179.00	\$15.00

When you open the page, a list of any Animal Services previously defined will display. If records have not yet been added, this page will not list any records. You can click the **Add a New Service** button to add a new Animal Service to the list.

**Animal Service List** ◀ Back

↶ Return to List
💾 Save Service

Add a new animal service.

\*Species Name:

\*Service:

Service Type:

Service Description:

Is Billable:  Yes  No

Billing Code:

Cost:

Administrative Cost:

When you add a new record, you will then be able to specify the details for that service. Fields marked with an asterisk denote a required field.

**Species Name** – This drop down list will contain the species defined in the Animal Species Configuration List. You must choose which species the Service applies to. If you have a Service that applies to more than one species, you can add additional records with the same information, but associate a different species.

**Service** – This is the name of the Service.

© iMedRIS Data Corporation

74

**Service Type** – This drop down list will contain the Service Types defined in the Animal Service Type Configuration List. This allows you to categorize your services.

**Service Description** – This field allows you to describe the Service, if necessary.

**Is Billable** – Select “Yes” if the service is billable. This will allow you to flag a Service for billing (if using the ARC Module). If a Service is not billable, leave this option set to “No.”

**Billing Code** – If the Service is billable, you may enter the Billing Code in this field.

**Cost** – If the Service is billable, you may enter the Cost of the Service in this field.

**Administrative Cost** - If the Service is billable, you may enter the Administrative Cost of the Service in this field.





Once you enter the necessary information, click the **Save Service** button.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the details related to the Service.

You can delete a record by selecting the checkbox next to the appropriate Animal Service and clicking on the **Delete Service(s)** button.

## Animal Study Type Configuration List

This configuration list will allow you to specify a pre-defined list of Animal Study Types that you can then associate to a study record.

System Administration - Animal Study Type			Back
			+ Add a New Record
Delete	Edit	Study Type	
		NonSurvival Surgery	
		Survival	

When you open the page, a list of any Animal Study Types previously defined will display. If records have not yet been added, this page will not list any records. You can click the **Add a New Record** button to add a new Animal Study Type to the list.

System Administration - Animal Study Type		Back
		Save Record
* Study Type:	<input type="text"/>	






When you add a new record, you will need to provide the **Study Type** and then click the **Save Record** button. The record will be added to the list of Animal Study Types.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Study Type.


You can delete a record by selecting the icon in the **Delete** column.

## Anesthetic Configuration List

This configuration list will allow you to specify a pre-defined list of Anesthetic records that you can then associate to a specific Species on a study.

System Administration - Configure Anesthetic							Back
							
2 result(s) found...							1 - 2
	Edit	Species name	Anesthetic	Route	Dose	Monitor	
<input type="checkbox"/>		Mouse	Propofol	Injection	1		
<input type="checkbox"/>		Pig	xylazine	oral	12		

When you open the page, a list of any Anesthetic records previously defined will display. If records have not yet been added, this page will not list any records. You can click **Add a New Record** to add a new Anesthetic to the list.

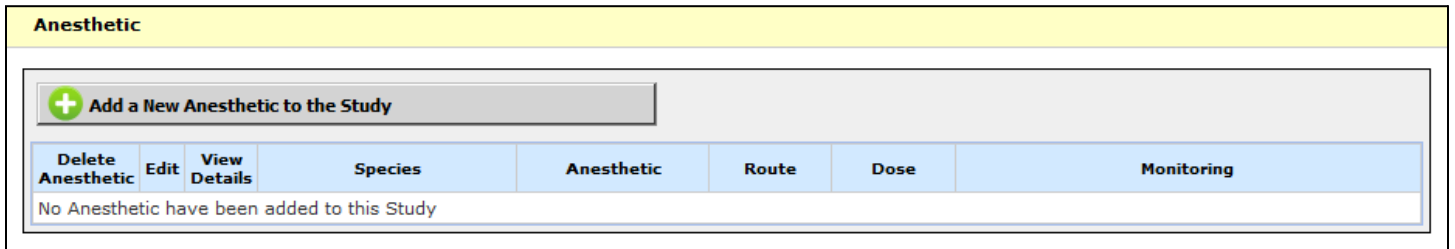
System Administration - Configure Anesthetic		Back
		
*Species Name:	--none--	
*Anesthetic:	--none--	or create New <input type="text"/>
*Route:	--none--	or create New <input type="text"/>
*Dose:	<input type="text"/>	
Monitoring:	<input type="text"/>	

When you add a new record, you will first need to select a **Species** from the drop down list. This list will contain the list of Species configured in the Animal Species Configuration List. Once you select a Species, select the **Anesthetic** from the dropdown list. If the specific Anesthetic you need to add for this species is not listed, you can create the Anesthetic by typing it in to the **Create New** field to the right of the Anesthetic drop down list. Associate the **Route** in the same way; select the proper Route from the drop down list. Otherwise, enter a new record in the **Create New** field. Once you have selected the appropriate records from the dropdown lists or created new records, specify the **Dose** and, if applicable, enter **Monitoring** information. Click the **Save Changes** button and the record will be added to the list of Anesthetic records.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Species, Anesthetic, Route, Dose, and Monitoring information.

You can delete a record by selecting the checkbox next to the appropriate Anesthetic record and clicking on the **Delete Record(s)** button.

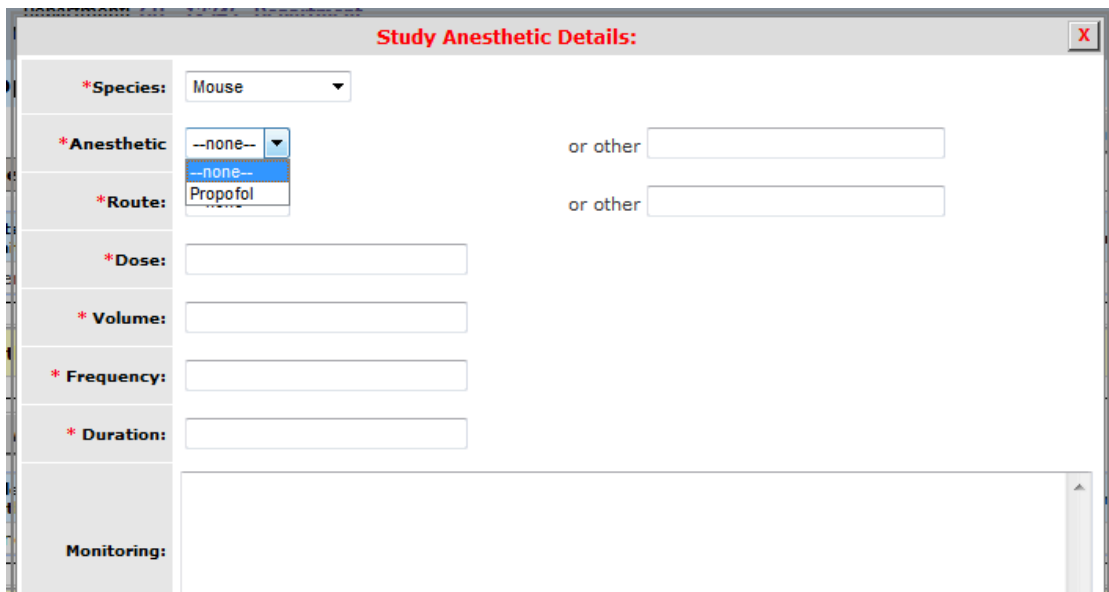
The Anesthetic records added to the Anesthetic Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Anesthetic, as shown in the screenshot below. The user can click the **Add a New Anesthetic to the Study** button.



A window will open within the browser, allowing the user to associate Anesthetic information. Because the Anesthetic records have been configured to specific Species, only information associated to the selected **Species** in the drop down list will display. Also note, that only Species associated to the study will display in the **Species** drop down list.

Once an Anesthetic is selected for the Species, the remaining supplied information will populate on the page. The user has the ability to change any of this information as needed, and the user can also add any Anesthetic or Route that may not have been configured in the Anesthetic Configuration List.

Once the information has been added, the user will click the **Save Anesthetic Info** button at the bottom of the window.



The Anesthetic record will display in the table below the **Add a New Anesthetic to the Study** button. If additional Anesthetic records need to be added to the study, the user can click this button again to repeat the process.

Anesthetic							
+ Add a New Anesthetic to the Study							
Delete Anesthetic	Edit	View Details	Species	Anesthetic	Route	Dose	Monitoring
			Mouse	Propofol	Injection	1	2x day

## Analgesia Configuration List

This configuration list will allow you to specify a pre-defined list of Analgesia records that you can then associate to a specific Species on a study.

System Administration - Configure Analgesia								Back
							+ Add a New Record	✖ Delete Record(s)
2 result(s) found...							1 - 2	
<input checked="" type="checkbox"/>	Edit	Species name	Analgesia	Route	Dose	Frequency	Monitor	
<input type="checkbox"/>		Mouse	Chloroform	Oral	1	4 times		
<input type="checkbox"/>		Mouse	Ether	Oral	1	5x daily		

When you open the page, a list of any Analgesia records previously defined will display. If records have not yet been added, this page will not list any records. You can click **Add a New Record** to add a new Analgesia record to the list.

System Administration - Configure Analgesia		Back
		Save Changes
*Species Name:	--none--	
*Analgesia:	--none--	or create New <input type="text"/>
*Route:	--none--	or create New <input type="text"/>
*Dose:	<input type="text"/>	
*Frequency:	<input type="text"/>	
Monitoring:	<input type="text"/>	

When you add a new record, you will first need to select a **Species** from the drop down list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a species, select the **Analgesia** from the dropdown list. If the specific Analgesia you need to add to this Species is not listed, you can create the Analgesia by typing it in to the **Create New** field to the right of the Analgesia drop down list. Associate the **Route** in the same way; select the proper Route from the drop down list. Otherwise, enter a new record in the **Create New** field. Once you have selected the appropriate records from the dropdown lists or created new records, specify the **Dose** and **Frequency** and, if applicable, enter **Monitoring** information. Click the **Save Changes** button, and the record will be added to the list of Analgesia records.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Species, Analgesia, Route, Dose, Frequency, and Monitoring information.

You can delete a record by selecting the checkbox next to the appropriate Analgesia record and clicking on the **Delete Record(s)** button.

The Analgesia records added to the Analgesia Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Analgesia, as shown in the screenshot below. The user can click the **Add a New Analgesia to the Study** button.

+ Add a New Analgesia to the Study							
Delete Analgesia	Edit	View Details	Species	Analgesia	Route	Dose	Monitoring
No Analgesia have been added to this Study							

A window will open within the browser, allowing the user to associate Analgesia information. Because the Analgesia records have been configured to specific species, only information associated to the selected **Species** in the drop down list will display. Also note that only Species associated to the study will display in the **Species** drop down list.

Once an Analgesia record is selected for the species, the remaining supplied information will populate on the page. The user has the ability to change any of this information as needed, and the user can also add any Analgesia or Route that may not have been configured in the Analgesia Configuration List.

Once the information has been added, the user will click the **Save Analgesia Info** button at the bottom of the window.

The Analgesia record will display in the table below the **Add a New Analgesia to the Study** button. If additional Analgesia records need to be added to the study, the user can click this button again to repeat the process.

Analgesia								
+ Add a New Analgesia to the Study								
Delete Analgesia	Edit	View Details	Species	Analgesia	Route	Dose	Frequency	Monitoring
			Mouse	Chloroform	Oral	1	4 times	

## Stipulation Category

If you would like to categorize your stipulations, you can create a list here and associate a stipulation to a specific category when you create the stipulation. To use categories for stipulations, the review board property `rb.use_stipulation_category` must be set to "Yes."

When you open the page, a list of any categories will display. If you have not set up any categories, the page will not list any records. You can add a new category by clicking on the **Add a Stipulation Category** button.

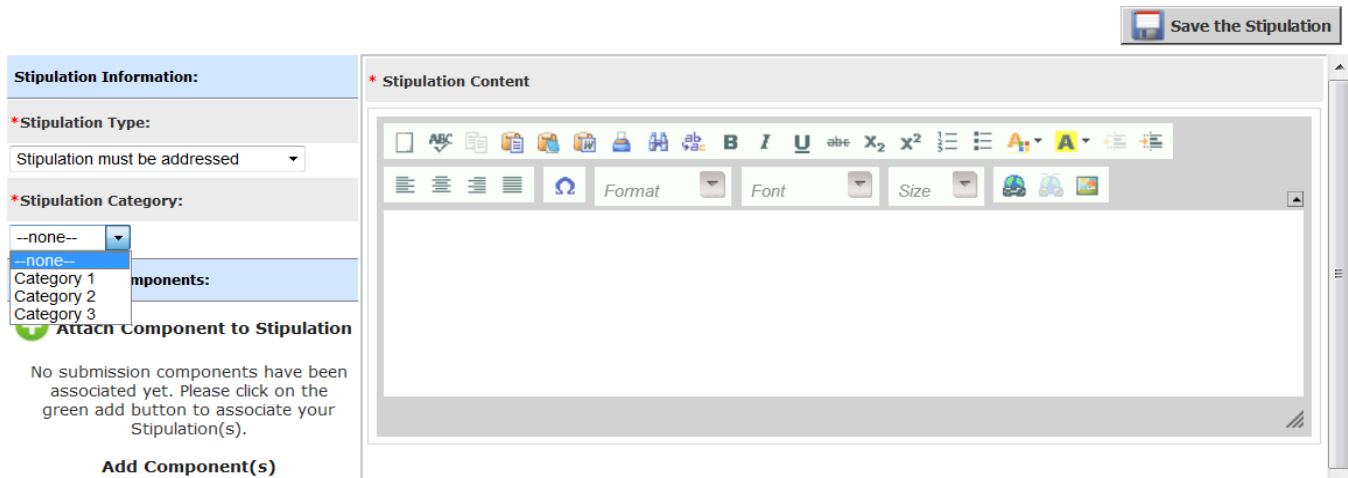
IACUC - Setup Review Board Stipulation Category			Back
			+ Add a Stipulation Category <span style="margin-left: 20px;">- Delete Selected Stipulation Category(s)</span>
<input checked="" type="checkbox"/>	Edit	Stipulation Category	
<input type="checkbox"/>		Animal Species	
<input type="checkbox"/>		Application	
<input type="checkbox"/>		Documents	

Type the **Stipulation Category** name, and click the **Save Stipulation Category** button to add the new category to the list.

IACUC - Setup Review Board Stipulation Category		Back
		Save Stipulation Category
*Stipulation Category:	<input type="text"/>	

You can edit existing categories by clicking the **Edit** icon next to the category name. This will open a page that will allow you to modify the name.

Any category you add to the list will populate in the Stipulation Category dropdown list when creating a stipulation for a submission.

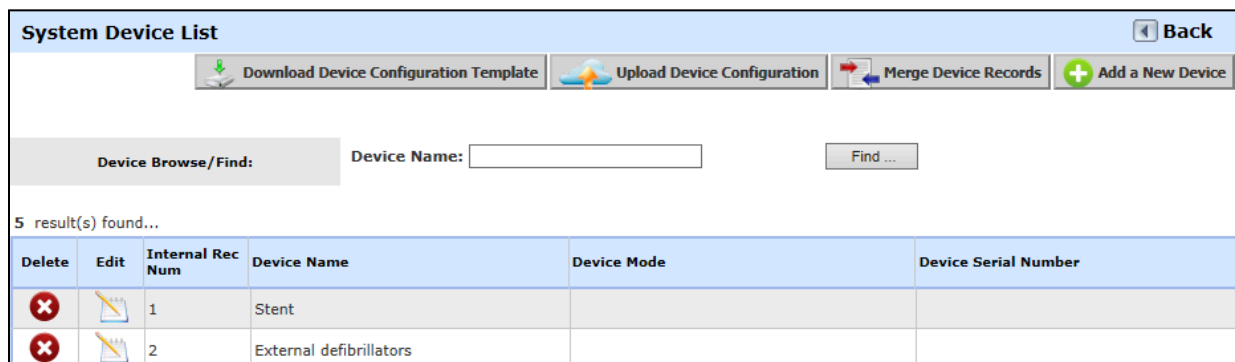


## Device Configuration List

The Device Configuration List allows you to **configure/add** or **Edit** all of the Devices within iRIS that would be available to be associated to a study.

After selecting this link, the master list of existing Devices will display. You will have the ability to **Edit** existing Devices as well as, **Download/Upload Device Configurations, Merge Device Records, Add a New Device,** and **Delete**, as seen in the image below.

Additionally, this page contains a **Search By** filter that allows you to search for specific Devices that have been previously added.

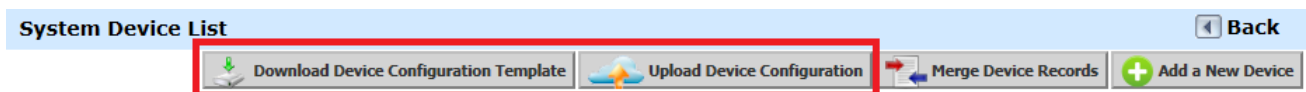


### Add a New Device

**Add a New Device** will prompt you to enter information into three fields. Only the first field, “Device Name,” is required. Clicking **Save Changes** will add the record to the list of devices within iRIS.

## Download/Upload Device

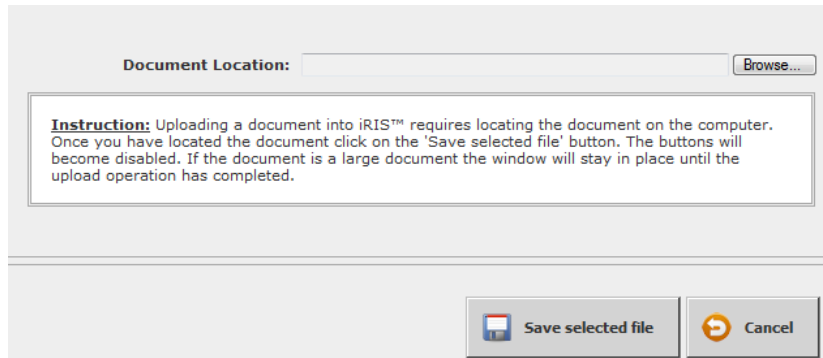
**Download/Upload Device Features** gives you the ability to easily upload an Excel file with as many device records as needed at one time.



**Download Device Configuration Template** – This feature will allow you to download a spreadsheet template; this template is set up in the proper format for uploading device records, with instructions for the input of data in each field. When downloading, be sure to **save** the file to a known location on your computer so the data can be input and saved for future uploading. Below you will find a screen shot of this spreadsheet template.

	A	B	C
1	<b>Device Name</b>	<b>Device Mode</b>	<b>Device Serial No</b>
2	No more than 128 characters	No more than 32 characters	No more than 32 characters
3	ACTIGRAPH		
4			

**Upload Device Configuration**– Selecting to upload the record will display a popup window, where you will be able to browse for the correct Excel file containing the Device records you wish to upload.



### Merge Device Records

**Merge Device Records** -This feature will allow you to merge duplicate records within the system.

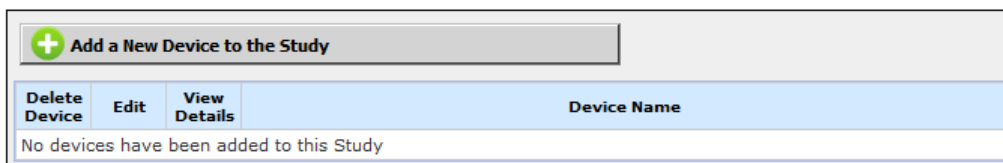


After making this selection, a list of the existing records will populate. Selecting two or more records will allow you to merge and select the record that you wish to keep.

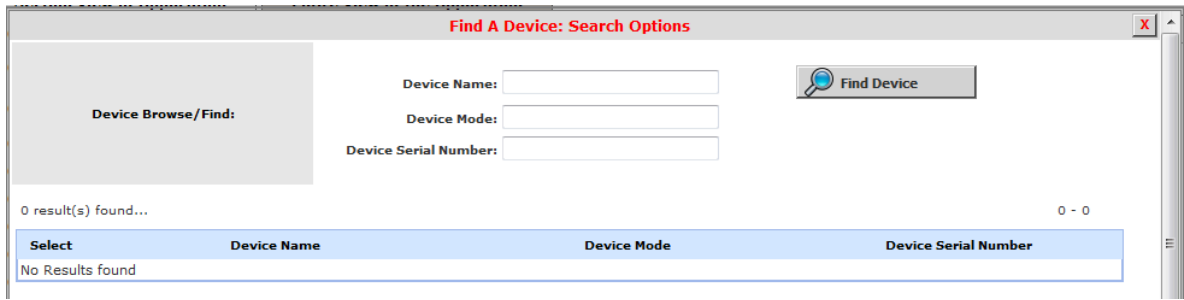


Note: For records already existing on Studies, the record that you selected to keep will apply to all studies, which had the deleted record applied.

**How these configurations affect iRIS** – Once Devices have been added to the master list, they become available to be associated to study applications through a data value.

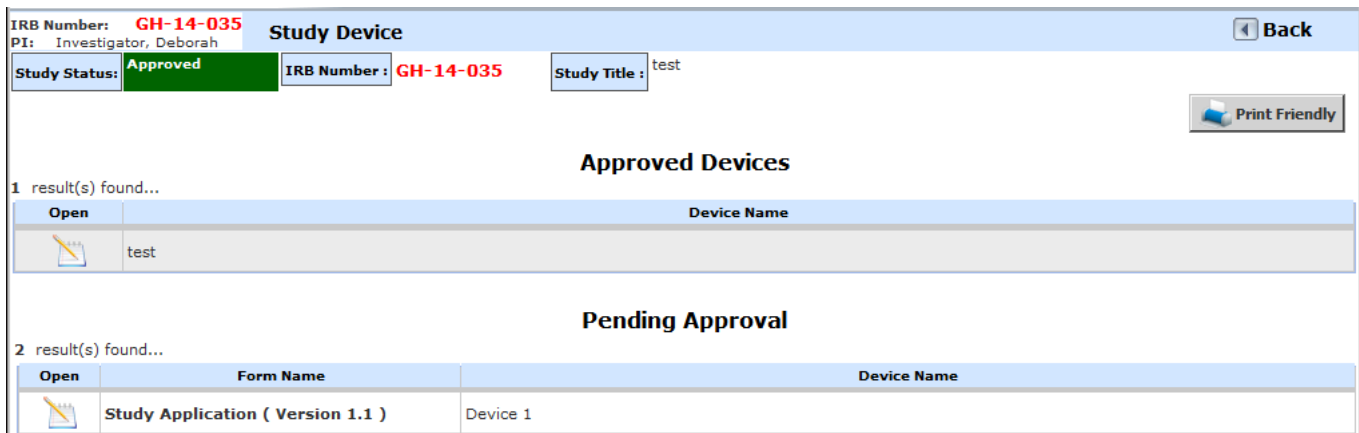


Selecting **Add a New Device** to the Study will display a popup window, which will allow the user to search for the applicable device.



If the board approves a submission with an attached device, the device(s) applicable to the submission then display as approved in the Study Management area for that particular study.

If any new devices need to be added, or existing devices need to be modified, the study will need to submit an amendment or modification to the review board of record for approval. Any modifications or new device requests will populate in the Pending Approval table, shown in the image below. Once the review board approves the modification or addition, the device record will populate in the Approved Devices table.



### Restraint Device Configuration List

The Restraint Device Configuration List allows you to add or edit all the Restraint Devices that can be associated to a study record.

After selecting this link, the master list of existing restraint Devices will display. You will have the ability to **Edit** existing Restraint Devices as well as **Merge Restraint Device Records**, **Add a New Restraint Device**, and **Delete** existing records.







This page contains a **Search By** filter which allows you to search for specific Restraint Devices within the list.

**System Restraint Device List** Back

Merge Restraint Device Records
+ Add a New Restraint Device

Restraint Device Browse/Find:
Restraint Device Name: 
Find ...

3 result(s) found...

Delete	Edit	Internal Rec Num	Restraint Device Name	Restraint Device Mode	Restraint Device Serial Number
		1	Monkey Chair		
		2	Rodent Retainer	RODENT SWIVEL RETAINE 50-871-5	50-871-545
		3	Swine slings		

### Add a New Restraint Device

**Add a New Restraint Device** will allow you to add a new restraint device to the master device list within iRIS. To add a new restraint device, you will need to provide the Restraint Device Name. Optionally, you may include the Restraint Device Mode and Restraint Device Serial Number. After entering the Restraint Device details, click the **Save Changes** button. Saving the record will update the master device list with the new entry.

**System Restraint Device List** Back

Save Changes

Add a new restraint device to the system.

**\*Restraint Device Name:**

**Restraint Device Mode:**

**Restraint Device Serial Number:**

### Merge Restraint Device Records

Also listed at the top of the page is the **Merge Restraint Device Records** button. This will allow you to manage your list of Restraint Devices by merging duplicate records into one record as needed. Users adding Restraint Devices to a study can add a Restraint Device to the master list if they cannot find the Restraint Device they need on the study. Merging Restraint Devices allows you to manage the list of user-added Restraint Devices in the case that a Restraint Device record already exists in the master list. To merge Restraint Device records, click the **Merge Restraint Devices Records** button.

A new page will open, listing the available Restraint Devices. Choose two or more records to merge, and then click the **Merge Selected Records** button.

**System Restraint Device Merge** ◀ Back

Merge Selected Records

Select two or more records to merge.

	Internal Rec Num	Restraint Device Name	Restraint Device Mode	Restraint Device Serial Number
<input type="checkbox"/>	3	Monkey chair		
<input checked="" type="checkbox"/>	5	restraint device 1		
<input checked="" type="checkbox"/>	6	Restraint Device 1		
<input type="checkbox"/>	1	Rodent Retainer	RODENT SWIVEL RETAINER 50-871-5	50-871-545
<input type="checkbox"/>	2	Swine slings		

The page refreshes to list only the Restraint Device records you selected. At this point, you need to indicate which Restraint Device record to keep by selecting the radio button next to the Restraint Device Name. Then click the **Merge** button. If you do not want to merge any records, click the **Cancel** button and you will be returned to the previous page.

**System Restraint Device Merge** ◀ Back

Merge
Cancel

Select the record you want to keep after merging.

	Restraint Device Name	Restraint Device Mode	Restraint Device Serial Number
<input type="radio"/>	restraint device 1		
<input checked="" type="radio"/>	Restraint Device 1		

When you merge two or more records, the Restraint Device you selected to keep will remain in the master configuration list and will also be applied to any study records using the other Restraint Device records. For example, the above case is merging two Restraint Devices, “Restraint Device 1” and “restraint device 1.” The correct Restraint Device Name in the master list is “Restraint Device 1;” however, a user added “restraint device 1” to a study, and the Restraint Device record was created in the master list. When these two records are merged, “restraint device 1” is no longer found in the master list and is replaced by “Restraint Device 1” within the study that had previously referenced “restraint device 1.”

### Restraint Device Functionality

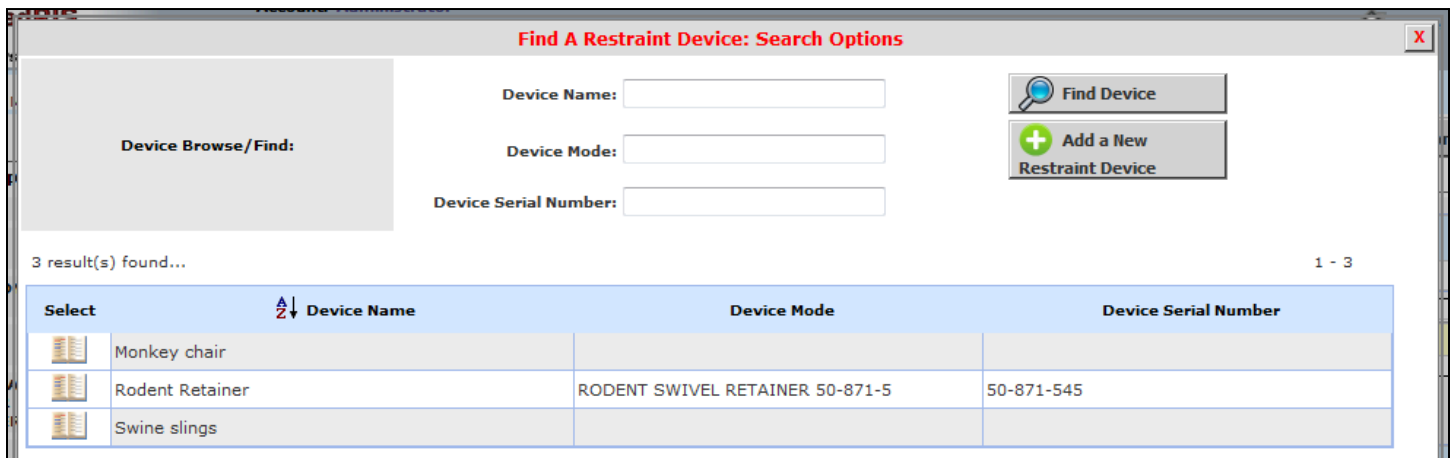
Any Restraint Devices added to the Restraint Device Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the selection of the Restraint Devices, as shown in the screenshot below. The user can click the **Add a New Restraint Device to the Study** button.

+ **Add a New Restraint Device to the Study**

	Delete Device	Edit	View Details	Device Name	FDA Approved	A new device or a new use of approved device:	IDE Number
No devices have been added to this Study							

A window will open within the browser, allowing the user to search the system for the appropriate Restraint Device. The user can search using the **Device Name**, **Device Mode**, and/or **Device Serial Number** fields to find a particular Restraint Device; otherwise, leaving that field blank and clicking the **Find Device** button will return all results.

If the desired Restraint Device is not found in the list, the user has the option to add a Restraint Device by clicking on the **Add a New Restraint Device** button.



The window will change, allowing the user to input the same Restraint Device information gathered when adding a Restraint Device through the Restraint Device Configuration List.

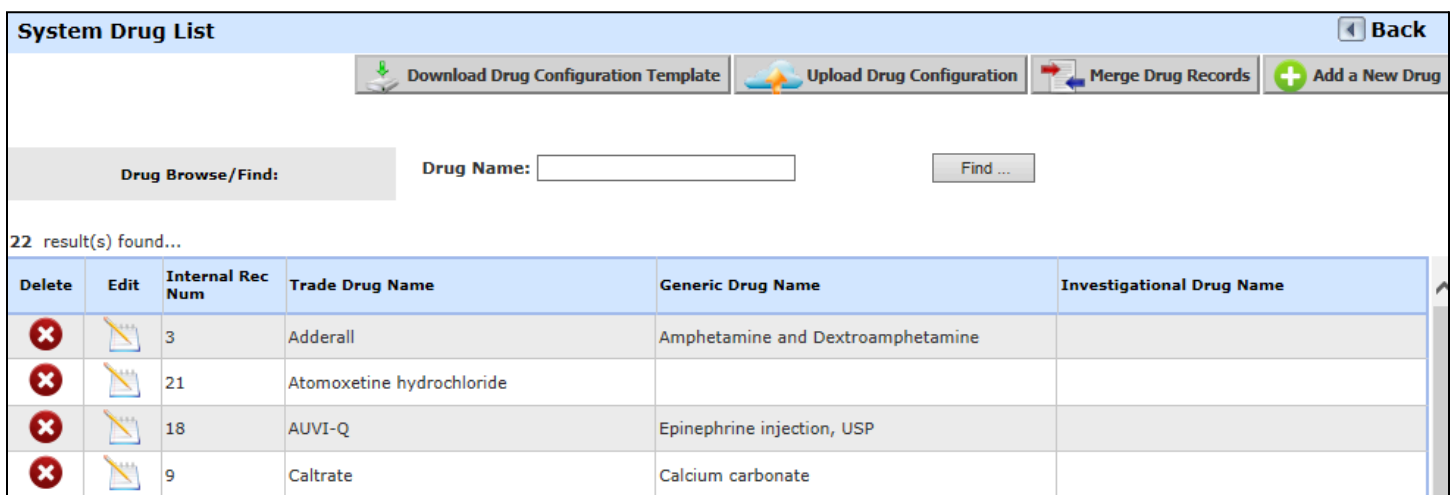
Once the necessary information is added, the user will click on the **Save Device Info** button and the Restraint Device will be added to the study as well as the Restraint Device Configuration List.

### Drug Configuration List

The Drug Configuration List allows you to add or edit all the Drugs within iRIS that would be available to be associated to a Study, regardless of module.

After selecting this link the master list of existing Drugs will display. You can **Edit** existing Drugs as well as **Download/Upload Drug Configurations, Merge Drug Records, Add a New Drug, and Delete Drug(s)**, as seen in the image below.

This page contains a **Search By** filter which allows you to search for specific drugs that has been previously added.



### Add a New Drug

**Add a New Drug** will allow you to add a new drug to the master drug list within iRIS. To add a new drug, you must enter the Trade Name, Generic Name, or Investigational Name. Only one of the three drug names is needed to add a new record to the system. Clicking the **Save Changes** button will add this drug record and update the master drug list.

**System Drug List** Back

Save Changes

Add a new drug to the system.

<b>Trade Name:</b>	<input type="text"/>
<b>Generic Name:</b>	<input type="text"/>
<b>If not yet named, Investigational Name:</b>	<input type="text"/>

### Download/Upload Drug

The Download/Upload Drug features give you the ability to upload an Excel file with as many drug records as needed at one time.



**Download Drug Configuration Template** – This feature will allow you to download a spreadsheet template. The template is setup in the proper format for uploading drug records, with instructions for the input of data in each field. When downloading, be sure to **save** the file to your Desktop so the data can be input and saved for future uploading. Below you will find a screen shot of this spreadsheet template.

	A	B	C
1	Trade Drug Name	Generic Drug Name	Investigational Drug Name
2	No more than 128 characters	No more than 128 characters	No more than 128 characters
3	ACTIVASE		

**Upload Drug Configuration**– Selecting to Upload the Record will display a popup window, where you will be able to browse for the correct Excel file containing the Drug records you wish to upload.

Document Location:

**Instruction:** Uploading a document into iRIS™ requires locating the document on the computer. Once you have located the document click on the 'Save selected file' button. The buttons will become disabled. If the document is a large document the window will stay in place until the upload operation has completed.

Once you upload drug records to the list, the system will confirm the number of records listed and they will be displayed in the Drug Configuration List.

### Merge Drug Records

Also listed at the top of the page is the **Merge Drug Records** button. This will allow you to manage your list of Drugs by merging duplicate records into one record as needed. Users adding Drugs to a study are able to add a Drug to the master list if they cannot find the Drug they need on the study. Merging Drugs allows you to manage the list of user-added Drugs in the case that a Drug record already exists in the master list. To merge Drug records, click the **Merge Drug Records** button.



A new page will open, listing the available Drugs. Choose two or more records to merge, and then click the **Merge Selected Records** button.

System Drug Merge <span style="float: right;">Back</span>				
<input data-bbox="1263 1360 1523 1392" type="button" value="Merge Selected Records"/>				
<b>Select two or more records to merge.</b>				
<input checked="" type="checkbox"/>	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
<input type="checkbox"/>	7	Advil		
<input checked="" type="checkbox"/>	3	ASPIRIN	ASPIRIN	Asprin
<input type="checkbox"/>	2	BANTHINE	METHANTHELIN BROMIDE	
<input checked="" type="checkbox"/>	9	Bayer	Aspirin	
<input type="checkbox"/>	8	Foaxilima		
<input type="checkbox"/>	4	Ritalin	Methylphenidate	
<input type="checkbox"/>	1	TYLENOL	ACETAMINOPHEN	

The page refreshes to list only the Drug records you selected. At this point, you need to indicate which Drug record to keep by selecting the radio button next to the Drug. Then, click the **Merge** button. If you do not want to merge any records, click the **Cancel** button and you will be returned to the previous page.

**System Drug Merge** ⏪ Back

Select the record you want to keep after merging.

	Trade Drug Name	Generic Drug Name	Investigational Drug Name
<input type="radio"/>	ASPIRIN	ASPIRIN	Asprin
<input checked="" type="radio"/>	Bayer	Aspirin	

When you merge two or more records, the Drug you selected to keep will remain in the master configuration list and will also be applied to any study records using the other Drug records. Example: the above case is merging two Drugs, “Bayer” and “ASPIRIN.” The correct Drug in the master list is “Bayer;” however, a user added “ASPIRIN” to a study, and the Drug record was created in the master list. When these two records are merged, “ASPIRIN” is no longer found in the master list, and is replaced by “Bayer” within the study that had referenced “ASPIRIN.”

### Drug Functionality

Any Drug records added to the Drug Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the selection of Drugs, as shown in the screenshot below. The user can click the **Add a New Drug to the Study** button.

**Drugs**

Delete Drug	Edit	View Details	Drug Name	FDA Approved	A new drug or a new use of approved drug:	IND Number
No drugs have been added to this Study						

A window will open within the browser, allowing the user to search the system for the appropriate Drug record. The user can use the **Drug Name** field to find a particular Drug; otherwise, leaving that field blank and clicking the **Find Drug** button will return all results.

If the desired Drug record is not found in the list, the user has the option to add a Drug by clicking on the **Add a New Drug** button.

**Find a Drug: Search Options**

**Drug Browse/Find:**

Drug Name:

Find Drug

+ Add a New Drug

6 result(s) found... 1 - 6

Select	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
	7	Advil		
	2	BANTHINE	METHANTHELIN BROMIDE	
	9	Bayer	Aspirin	
	8	Foaxilima		
	4	Ritalin	Methylphenidate	
	1	TYLENOL	ACETAMINOPHEN	

The window will change, allowing the user to input the same Drug information gathered when adding a Drug through the Drug Configuration List. Once the necessary information is added, the user will click on the **Save Drug Info** button and the Drug will be added to the study as well as the Drug Configuration List.

**Add a New Drug**

Trade Drug Name:

Generic Name:

If not yet named, Investigational Drug Name:

### Euthanasia Method Configuration List

This configuration list will allow you to specify a pre-defined list of Euthanasia Methods that you can then associate to a specific Species on a study.

**System Administration - Configure Euthanasia Method** Back

+ Add a New Record

3 result(s) found... 1 - 3

<input checked="" type="checkbox"/>	Edit	Species name	Euthanasia Method	Route	Dose	Monitoring
<input type="checkbox"/>		Mouse	Cervical dislocation			
<input type="checkbox"/>		Mouse	Intravenous anesthetic	Injection		
<input type="checkbox"/>		Mouse	Isoflurane inhalant	Inhalant		

When you open the page, a list of any Euthanasia Methods previously defined will display. If Euthanasia Methods have not yet been added, this page will not list any records. You can click the **Add a New Record** to add a new Euthanasia Method to the list.

**System Administration - Configure Euthanasia Method** Back

**\*Species Name:** --none--

**\*Euthanasia Method:** --none--

**Route:** --none--

**Dose:**

**Monitoring:**

When you add a new record, you will first need to select a **Species** from the drop down list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a species, select the **Euthanasia Method** from the dropdown list. If the specific Euthanasia Method you need to add to this species is not listed, you can create the record by typing it in to the **Create New** field to the right of the Euthanasia Method drop down list. Associate the **Route** in the same way; select the proper Route from the dropdown list, or enter a new record in the **Create New** field. Once you have selected the appropriate records from the dropdown lists or created new records, specify the **Dose**, and, if applicable, enter **Monitoring** information. Click the **Save Changes** button and the record will be added to the list of Euthanasia Methods.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page allowing you to modify the Species, Euthanasia Method, Route, Dose, and Monitoring information.

You can delete a record by selecting the checkbox next to the appropriate Euthanasia Method and clicking on the **Delete Record(s)** button.

The Euthanasia Methods added to the Euthanasia Methods Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Euthanasia Methods, as shown in the screenshot below. The user can click the **Add a New Euthanasia to the Study** button.

**Euthanasia**

Delete Euthanasia	Edit	View Details	Species	Euthanasia Method	Route	Dose	Monitoring
No Euthanasia methods have been added to this Study							

A window will open within the browser, allowing the user to associate Euthanasia Method information. Because the Euthanasia records have been configured to specific species, only information associated to the selected **Species** in the dropdown list will display. Also, note that only species associated to the study will display in the **Species** drop down list.

Once a Euthanasia Method is selected for the species, the remaining supplied information will populate on the page. The user can change any of this information as needed, and the user can also add any Euthanasia Method or Route that may not have been configured in the Euthanasia Method Configuration List.

Once the information has been added, the user will click the **Save Euthanasia Info** button at the bottom of the window.

The Euthanasia record will display in the table below the **Add a New Euthanasia to the Study** button. If additional Euthanasia records need to be added to the study, the user can click this button again to repeat the process.

### Fluid Extract Configuration List

This configuration list will allow you to specify a pre-defined list of Fluid Extract records that you can then associate to a specific species on a study.

System Administration - Configure Fluid Extract						Back
						<input type="button" value="+ Add a New Record"/> <input type="button" value="X Delete Record(s)"/>
2 result(s) found...						1 - 2
<input type="checkbox"/>	Edit	Species name	Fluid Extraction	Frequency	Volume	Method of Collection
<input type="checkbox"/>		Mouse	Blood Collection	1/month	1 mg	
<input type="checkbox"/>		Mouse	Blood Collection	1/week	2mg	

When you open the page, a list of any Fluid Extract records previously defined will display. If Fluid Extract records have not yet been added, this page will not list any records. You can click the **Add a New Record** to add a new Fluid Extract record to the list.

**System Administration - Configure Fluid Extract** Back

**\*Species Name:** --none--

**\*Fluid Extraction:** --none-- or create New

**\*Frequency:** --none-- or create New

**\*Volume:**

**\*Method of Collection:**

Save Changes

When you add a new record, you will first need to select a **Species** from the drop down list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a species, select the **Fluid Extraction** from the dropdown list. If the specific Fluid Extraction you need to add to this species is not listed, you can create the record by typing it into the **Create New** field to the right of the Fluid Extraction drop down list. Associate the **Frequency** in the same way; select the proper Frequency from the drop down list, or enter a new record in the **Create New** field. Once you have selected the appropriate records from the dropdown lists or created new records, specify the **Volume** and enter **Method of Collection** information. Click the **Save Record** button and the record will be added to the list of Fluid Extract records.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page allowing you to modify the Species, Fluid Extraction, Frequency, Volume, and Method of Collection information.

You can delete a record by selecting the checkbox next to the appropriate Fluid Extract record and clicking on the **Delete Record(s)** button.

The Fluid Extraction records added to the Fluid Extract Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Fluid Extraction records, as shown in the screenshot below. The user can click the **Add a New Fluid Extract to the Study** button.

**Fluid Extraction**

+ Add a New Fluid Extract to the Study

Delete Fluid Extract	Edit	View Details	Species	Fluid Extraction	Frequency	Volume	Method of Collection
No Fluid Extracts have been added to this Study							

A window will open within the browser, allowing the user to associate Fluid Extract information. Only Species associated to the study will display in the **Species** drop down list.

Once a Fluid Extraction is selected for the Species, the remaining supplied information will populate on the page. The user can change any of this information as needed, and the user can also add any Fluid Extraction or Frequency that may not have been configured in the Fluid Extract Configuration List.

Once the information has been added, the user will click the **Save Fluid Extract Info** button at the bottom of the window.

The Fluid Extract record will display in the table below the **Add a New Fluid Extract to the Study** button. If additional Fluid Extraction records need to be added to the study, the user can click this button again to repeat the process.

### Internal Document Category

You can create categories for any Internal Documents you upload to a study within the review board.

When you open the page, a list of any categories will display. If you have not set up any categories, the page will not list any records.

You can add a new category by clicking on the **Add a Document Category** button.

IACUC - Setup Review Board Internal Document Category		Back
		<input type="button" value="+ Add a Document Category"/> <input type="button" value="X Delete Selected Document Category(s)"/>
Edit	Document Category	
	IACUC Findings	
	Internal Use Only	

Type in the **Document Category** name, and click the **Save Document Category** button to add the new category to the list.

IACUC - Setup Review Board Internal Document Category Back

\*Document Category:

You can edit existing categories by clicking the **Edit** icon next to the category name. This will open a page that will allow you to modify the name.

Any category you add will populate in the Category dropdown list when you are uploading a document in the Review Board Internal Documents area within a study.

<b>*Title:</b>	Internal Document Attachment
<b>*Version Number:</b>	1 .0
<b>Version Date:</b>	02/17/2014
<b>Category:</b>	Additional Documents
<b>Description:</b>	Additional Documents Flyers Internal Document(s)
<b>Load the document into iRIS:</b>	<input type="button" value="Upload ..."/>
<b>Save the Document to my machine:</b>	<input type="button" value="Download ..."/>

## Internal Routing User Roles

When you are assigning a user to an Internal Routing task, you can specify a role for that user. To use the roles feature, the review board property `rb.useReviewRouting_user_role` must be set to "Yes."

When you open the page, a list of any roles will display. If you have not set up any roles, the page will not list any records. You can add a new role by clicking on the **Add a User Role** button.

IACUC - Review Board Setup Internal Routing User Roles List			Back
		<input type="button" value="+ Add a User Role"/>	<input type="button" value="X Delete Selected Role(s)"/>
IACUC list of internal routing user roles.			
<input type="checkbox"/>	Edit	User Role	
<input type="checkbox"/>		Board Chair	
<input type="checkbox"/>		Scientific Reviewer	

Type in the **User Role** name, and then click the **Save User Role** button to add the new role to the list.

IACUC - Review Board Setup Internal Routing User Roles List		Back
		<input type="button" value="Save User Role"/>
IACUC add an internal routing user role.		
<b>*User Role:</b>	<input type="text"/>	

You can edit existing roles by clicking the **Edit** icon next to the role name. This will open a page that will allow you to modify the name. To delete a role, check the box next to the record in the list and click **Delete Selected Role(s)**.

Any role you add to the list will populate in the dropdown list next to the user assignment when you are making an Internal Routing assignment for a Submission.

+ Add Review Board Routing
+ Add Non-Review Board Routing
Print Friendly

	Order Number	Click to review	Assignment Comments			
			Assigned To	Role	Date Notified	Date Completed
			User Comments			
	0		Assignment Comments: Board Member, Jan, Ph.D.			
				--none-- --none-- ACORP Pre-Reviewer ACORP Reviewer		

### Member Specialty Configuration List

This is where you define the review board member specialties. This list of specialties is available to determine each review board member’s specialty. This list is shared between other review board modules. Any changes made to this list will be reflected across all modules.

**System Administration - Agent Name** Back

+ Add a New Record

Delete	Edit	Specialty
		Administration
		Anesthesiology
		Biochemistry
		Cardiology
		Dermatology
		Emergency Medicine

You can add a new specialty by clicking the **Add a New Record** button. You will be able to enter in the **Specialty**. Once you are finished, click the **Save Record** button to have the Specialty added to the list.

**System Administration - Review Board Member Specialty** Back

Save Record

\* Specialty:

The specialties can also be edited or deleted here as well.

To delete a record, click the icon in the **Delete** column. Click the **OK** button to continue and delete the record(s). Click the **Cancel** button to cancel the deletion.

To edit, click the **Edit** icon next to the specialty to be edited and a new page will open. Change the name of the specialty, and then click the **Save Record** button. The changes will be saved to the record. To return to the list without saving the changes click the **Back** button.

The **Specialty** column displays the title of the specialty as it will display for the reviewers to choose from.

The member specialty list is available when adding guests to the meeting attendance in the agenda (see below), as well as being available to choose from when entering information into user accounts.

\*Guest Name:

\*Specialty:

\*Affiliation:

--none--

Administration

Anesthesiology

Biochemistry

Cardiology

Dermatology

Emergency Medicine

## Paralyzing Agent Configuration List

This configuration list will allow you to specify a pre-defined list of Paralyzing Agents that you can then associate to a specific species on a study.

System Administration - Configure Paralyzing Agent						Back
					<input type="button" value="+ Add a New Record"/> <input type="button" value="X Delete Record(s)"/>	
3 result(s) found...						1 - 3
<input type="checkbox"/>	Edit	Species name	Paralyzing Agent	Route	Dose	Monitor
<input type="checkbox"/>		Mouse	Halothane	Inhalant	1	
<input type="checkbox"/>		Mouse	Isoflurane	Inhalant	12	
<input type="checkbox"/>		Pig	Phenothiazines	IV	12	

When you open the page, a list of any Paralyzing Agents previously defined will display. If Paralyzing Agents have not yet been added, this page will not list any records. You can click **Add a New Record** to add a new Paralyzing Agent to the list.

System Administration - Configure Paralyzing Agent				Back
				<input type="button" value="Save Changes"/>
*Species Name:	<input type="text" value="--none--"/>			
*Paralyzing Agent:	<input type="text" value="--none--"/>	or create New	<input type="text"/>	
*Route:	<input type="text" value="--none--"/>	or create New	<input type="text"/>	
*Dose:	<input type="text"/>			
Monitoring:	<input type="text"/>			

When you add a new record, you will first need to select a **Species** from the drop down list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a species, select the **Paralyzing Agent** from the drop down list. If the specific Paralyzing Agent you need to add to this species is not listed, you can create the record by typing it in to the **Create New** field to the right of the Paralyzing Agent dropdown list. Associate the **Route** in the same way; select the proper Route from the dropdown list, or enter a new record in the **Create New** field. Once you have

selected the appropriate records from the dropdown lists or created new records, specify the **Dose** and, if applicable, enter **Monitoring** information. Click the **Save Changes** button and the record will be added to the list of Paralyzing Agents.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page allowing you to modify the Species, Paralyzing Agent, Route, Dose, and Monitoring information.

You can delete a record by selecting the checkbox next to the appropriate Paralyzing Agent and clicking on the **Delete Record(s)** button.

The Paralyzing Agent records added to the Paralyzing Agent Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Paralyzing Agent records, as shown in the screenshot below. The user can click the **Add a New Paralyzing Agent to the Study** button.

Paralyzing Agent							
<input type="button" value="+ Add a New Paralyzing Agent to the Study"/>							
Delete Paralyzing Agent	Edit	View Details	Species	Paralyzing Agent	Route	Dose	Monitoring
No Paralyzing Agents have been added to this Study							

A window will open within the browser, allowing the user to associate Paralyzing Agent information. Because the Paralyzing Agent records have been configured to specific species, only information associated to the selected **Species** in the dropdown list will display. Also note that only species associated to the study will display in the **Species** drop down list.

Once a Paralyzing Agent and Route are selected for the species, the remaining supplied information will populate on the page. The user has the ability to change any of this information as needed, and the user can also add any Paralyzing Agent or Route that may not have been configured in the Paralyzing Agent Configuration List.

Once the information has been added, the user will click the **Save Paralyzing Agent Info** button at the bottom of the window.

The Paralyzing Agent record will display in the table below the **Add a New Paralyzing Agent to the Study** button. If additional Paralyzing Agent records need to be added to the study, the user can click this button again to repeat the process.

Paralyzing Agent							
+ Add a New Paralyzing Agent to the Study							
Delete Paralyzing Agent	Edit	View Details	Species	Paralyzing Agent	Route	Dose	Monitoring
			Mouse	Halothane	Inhalant	1	1

## Predefined Stipulations

If you have a list of commonly used stipulations, you can set them up in Predefined Stipulations.

IACUC - Stipulation Setup					Back	
					+ Add a New Stipulation	Delete Selected Stipulation(s)
List of approved canned stipulations						
2 result(s) found...						
	Edit	Category	Order Number	Stipulation		
<input type="checkbox"/>		Application	1	Predefined Stipulation Text 1		
<input type="checkbox"/>		Application	2	Predefined Stipulation Text 2		

When you open the Predefined Stipulations page, a list of any predefined stipulations will display. If you have not set up any stipulations, the page will not list any records. You can add a new predefined stipulation by clicking on the **Add a New Stipulation** button.

**IACUC - Stipulation Setup** Back

Save Stipulation

Add a stipulation to the system.

\* **Category:** --none--  
 --none--  
 Animal Species  
 Application  
 Documents

\* **Stipulation Content:**

\* **Order:** 1

If you have set your system to use Stipulation Categories, the **Category** field will populate at the top of the page containing the list of categories you have created. You can associate the category to the stipulation by making a selection from the dropdown list.

Type in the **Stipulation Content** and specify an **Order**, and then click the **Save Stipulation** button to add the predefined stipulation to the list.

You can edit existing stipulations by clicking the **Edit** icon next to the record. This will open a page that will allow you to modify the **Stipulation Content** and the **Order**.

When you are creating a stipulation for a Submission, you will be able to select the option to **Add Pre-defined Stipulation**.

Print Friendly Add Multiple Add New **Add Pre-defined**

Stipulations to be sent for Response ⓘ

Delete	Edit	Sorting Number	Stipulation Type	Stipulation Category	Follow-up Due	Stipulation	Requested By	Link To Component
No Stipulations entered								

Clicking the **Add Pre-defined** button will open the list of predefined stipulations that exists in the configuration list.

**Study Number:** M3  
**PI:** Investigator, Susan M., Ph.D. **Review Stipulation** Back

Save Selected Stipulations for Study

List of approved canned Stipulation

2 result(s) found...

<input checked="" type="checkbox"/>	Category	Stipulation
<input checked="" type="checkbox"/>	Application	Predefined Stipulation Text 1
<input type="checkbox"/>	Application	Predefined Stipulation Text 2

## Review Outcome/Outcome Configuration List

Set up the Outcome list for submissions here.

When you open the page, a list of any existing review outcomes will display. If you have not set up any review outcomes, the page will not list any records.

**IACUC - Review Board Setup Review Outcome** Back

Add a New Action Delete Selected Action(s)

IACUC list of review outcomes.

<input checked="" type="checkbox"/>	Edit	Action Name	Response Required	Copy Submission	Indicates Approved
<input type="checkbox"/>		Approved	No	No	Yes
<input type="checkbox"/>		Approved Pending	Yes	No	No
<input type="checkbox"/>		Denied	No	No	No
<input type="checkbox"/>		Tabled	No	Yes	No

You can add a new review outcome by clicking on the **Add a New Action** button.

**IACUC - Review Board Setup Review Outcome** Back

Save Review Outcome

IACUC add a review outcome.

**\*Review Outcome:**

**\*Response Required:**  Yes  No

**\*Submission Copy required:**  Yes  No

**\*Action indicates an Approved Status:**  Yes  No

Enter in the **Review Outcome** name.

You can also specify which flags to apply to this Outcome.

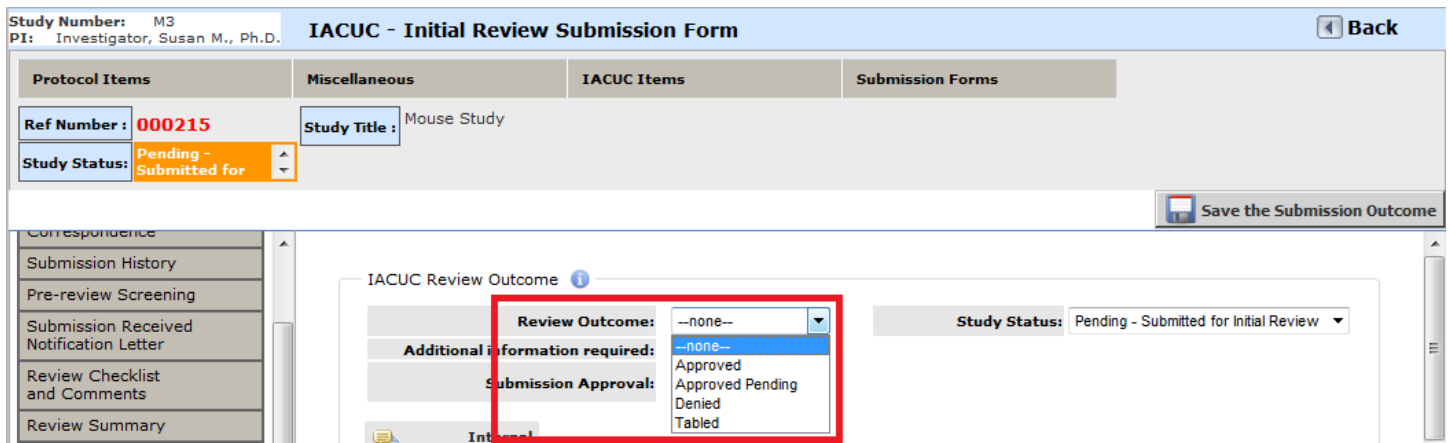
**Response Required** – When this option is set to “Yes,” the system will return a submission to the study for corrections once this Outcome is set.

**Submission Copy Required** – When this option is set to “Yes,” the system will place a copy of the submission back into the Not Assigned queue. This setting is typically used to flag Tabled submissions so you can flag a tabled item and then assign it to another meeting from the Not Assigned queue.

**Action indicates an Approved Status** - When this option is set to “Yes,” the system will flag this submission as Approved and mark any submission form associated to the submission as approved. Note: this does not include study documents; those must be approved and stamped separately.

You can edit existing review outcomes by clicking the **Edit** icon next to the record. This will open a page that will allow you to modify the **Review Outcome**.

The list of Review Outcomes will populate in the Review Outcome list in the Outcome tab within the submission processing screens.



## Reviewer Rank Configuration List

You can define your reviewer ranks here.



When you open the page, a list of any reviewer ranks will display. If you have not set up any reviewer ranks, the page will not list any records.

You can add a new reviewer rank by clicking on the **Add a New Rank** button.

**IACUC - Review Board Setup Reviewer Rank**
Back

Save Reviewer Rank

**\*Reviewer Rank:**

**\*Is this the label for an Ad Hoc Reviewer:**  Yes  No

**\*If this is not an Ad Hoc Reviewer please add the Rank ( i.e. 1, 2, 3):**

Type in the **Reviewer Rank** and specify whether the rank represents an Ad Hoc reviewer by selecting “Yes” or “No.” You must also specify a number for the rank. Specify 1, 2, 3, or 0 (for Ad Hoc reviewer ranks). These numbers tell the system how to treat the reviewer rank. “1” indicates a Primary Reviewer in the system. “2” indicates a Secondary Reviewer. “3” indicates any other review level. “0” indicates Ad Hoc. Click the **Save Reviewer Rank** button to add the record to the list.

You can edit existing reviewer ranks by clicking the **Edit** icon next to the record. This will open a page that will allow you to modify the record.

Study Number: M3  
PI: Investigator, Susan M., Ph.D.
**IACUC - Initial Review Submission Form**
Back

**Protocol Items**

Ref Number : **000215**

Study Status: Pending - Submitted for

**Miscellaneous**

Study Title : Mouse Study

**IACUC Items**

**Submission Forms**

Save the Pre-Review Screening

- Correspondence
- Submission History
- Pre-review Screening**
- Submission Received Notification Letter
- Review Checklist and Comments
- Review Summary
- Submission Discussion
- Recommendation
- Stipulation
- Internal Submission Routing
- Vote
- Outcome

Pre-Review Forward to another Board/Committee

Pre-Review changes requested

Process Administratively

Assign Reviewers ⓘ

Add Comments for All Reviewers
Add Reviewer
View Reviewers Workload

Reviewer Role	Reviewer	Completed ?	Date Notified	Date Completed
<div style="border: 2px solid red; padding: 2px; display: inline-block;"> <input style="width: 80px;" type="text" value="--none--"/> <ul style="list-style-type: none"> <li>--none--</li> <li>Primary</li> <li>Secondary</li> <li>Ad Hoc</li> </ul> </div>		No		

Reviewer rank populates in the Reviewer Role column when you are assigning a reviewer to a submission.

If the reviewer rank you selected is an Ad Hoc rank, you will be able to select a named board member from the dropdown list in the Reviewer column, or you can type in the first name and last name of the user (for specialty reviewers who do not have a user account in iRIS).

Assign Reviewers Add Comments for All Reviewers Add Reviewer View Reviewers Workload

Reviewer Role	Reviewer	Completed ?	Date Notified	Date Completed
Primary	Member, Joe	No		
Ad Hoc	Known System identified User: --none-- OR First Name: <input type="text"/> Last Name: <input type="text"/>	No		

### Setup Review Board Stipulation Actions

Review Board Stipulation Actions are applied to Stipulations once a study responds and reports back to the review board. Stipulation Actions determine whether or not the Stipulation can be closed/complete or must be copied and applied back to the study.

When you open the page, a list of any Stipulation Actions will display. If you have not set up any Stipulation Actions, the page will not list any records.

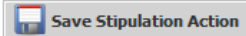
**IACUC - Setup Stipulation Review Board Actions** Back

+ Add a Stipulation Action
- Delete Selected Stipulation Action(s)

<input type="checkbox"/>	Edit	Copy to Current Submission Stipulation(s)	Review Board Stipulation Action	Default Stipulation Review Outcome when the Submission is Complete
<input type="checkbox"/>		No	Accept	No
<input type="checkbox"/>		No	Pending	No
<input type="checkbox"/>		Yes	Response not accepted	No

To delete existing Stipulation Actions, click the checkbox next to the item desired and click the **Delete Selected Stipulation Action(s)** button. To edit a Stipulation Action, click the **Edit** icon next to the desired Stipulation Action. To add a new Stipulation Action, click the **Add a Stipulation Action** button.

**IACUC - Setup Stipulations Review Board Actions** Back



**\*Action:**

**\*Automatically Copy Stipulation from Previous Submission to Current Submission :**  Yes  No

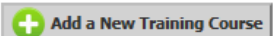
**\*Default Stipulation Review Outcome when the Submission is Complete:**

Type in the **Action** and specify whether or not to **Automatically Copy Stipulation from Previous Submission to Current Submission**. This setting controls when the Stipulation should be closed, or, if it has not been addressed, it will be copied to the current submission under review, meaning it will return back to the study again. Choosing “Yes” for this option will cause any Stipulation given this Action to copy and return to the study. Choosing “No” will cause any Stipulation given this Action to be closed. If you would like Stipulations to default to a closed Action without having to manually assign an Action, select the checkbox for **Default Stipulation Review Outcome when the Submission is Complete**. Click the **Save Stipulation Action** button to add the record to the list.







## Setup Training Courses

The Setup Training Courses page lists the current training courses that a user can be assigned. Training Course information is typically set up within System Administration; however, the review board can create Training Courses if needed.

**Training Courses** Back



3 result(s) found...

Delete	Edit	Course Name
		Basic Course
		Refresher Course 2
		Refresher Course 3

To delete a record, click the icon in the **Delete** column. Click the **OK** button to continue and delete the record(s). Click the **Cancel** button and the record will not be deleted.

To edit a course, click the **Edit** icon next to the course to be edited. After a new page opens, you may change the name of the course, and then click the **Save Training Course** button to save the changes. Click the **Back** button to return to the list without saving any changes.

The **Course Name** column displays the name of the course that will be displayed.

Click the **Add New Training Course** button to add a course to the list.

**System Training Course** ◀ Back

Save Training Course

**\*Training Course Name:**

Enter the name of the course. Click the **Back** button to return to the Training Course list page without saving any changes. Click the **Save Training Course** button to add the course to the Training Course list page.

### Business Associate List

The Business Associate List contains a list of the institutions you may need to track as a Sponsor, Subrecipient, Vendor, etc. Records added to the Business Associate list can be used in a variety of ways in the system. They can be added as a study sponsor, as a third party for a conflict of interest, or as a sponsor or subrecipient on a project.

After selecting this link the master list of existing Associates will display. You will have the ability to **Download/Upload** the Associate Configuration Template, **Edit** the existing, as well as **Merge Associate Records**, **Add a New Associate** and **Delete**, as seen in the image below. Additionally this page contains several **Search** filters allowing you to search for a specific record.

**System Setup of Business Associate List** ◀ Back

Download Associate Configuration Template
 Upload Associate Configuration
 Merge Associate Records
 Add a New Associate

Associate Browse/Find:

Name:

Associate Group:

Competitor

Vendor

Animal Vendor

Purchaser

Supporter

Lab Supply Vendor

Research Affiliate

Subrecipient

Vet Supply Vendor

Sponsor

185 result(s) found... ◀ 31 - 40 ▶

Delete	Edit	Internal Rec Num	Associate Name	Associate Abbrev.	Associate Group	Business Associate Type
		125	[9202] Centers for Disease Control		Sponsor;	Other United States Federal Government Agency
		132	[9203] Department of Defense		Sponsor;	Other United States Federal Government Agency
		261	[9205] Dept of Education		Sponsor;	Other United States Federal Government Agency
		262	[9207] Dept of Energy		Sponsor;	Other United States Federal

Selecting **Add a New Associate** will prompt you to enter the below fields. Saving this information will add the record to the list of Associates/Sponsors within iRIS.

System Setup of Business Associate List		Back
<b>Business Associate Info</b>		
		Save Changes
Associate Abrv:	<input type="text"/>	Street 1:
* Associate Name:	<input type="text"/>	Street 2:
Status:	Deleted	City:
Associate Group:	<input type="checkbox"/> Competitor	County/Parish:
	<input type="checkbox"/> Purchaser	State:
	<input type="checkbox"/> Research Affiliate	Province:
	<input type="checkbox"/> Sponsor	Country:
	<input type="checkbox"/> Vendor	Zip/Postal Code:
	<input type="checkbox"/> Supporter	
	<input type="checkbox"/> Subrecipient	
External Associate ID:		
* Associate Type:	--none--	

**Associate Abrv** – Allows the designation of an abbreviation for the particular associate, but is not required.

**Associate Name** – Designating the associate's name is a required field.

**Status** – Displays the internal status of the record. Once you save the record, this status changes to an *Active* status.

**Associate Group** – Allows the designation of the group the business associate belongs to. **Depending on the answer given in this list, additional fields below will populate, and be available for entry.** Note: The Associate Group list is a configurable list.

**Street 1 & 2, City, County/Parish, State, Province, Country, Zip/Postal Code** – Allows the input of the Associate/Sponsor's address or location information.

Once a record has been **saved** into the system it will be added to the master list.

Selecting to **Merge Associate Records** allows you to merge duplicate records within the system.

System Setup of Business Associate List		Back
		Merge Associate Records
		Add a New Associate

After making this selection, a list of the existing records will populate. Selecting two or more records will allow you to merge and select the record that you wish to keep.

Merge Sponsor List <span style="float: right;">Back</span>			
<input type="button" value="Merge"/> <input type="button" value="Cancel"/>			
Select the record you want to keep after merging.			
Internal Rec Num	Sponsor Abbrev.	Sponsor Name	Sponsor Type
<input type="radio"/> 76		NIH/National Institute of Mental Health (NIMH)	Federal - NIH
<input type="radio"/> 161		NIH/National Institute of General Medical Sciences (NIGMS)	Federal - NIH

Note: For records already existing on Studies, the record that was kept will apply to all studies which had the deleted record applied.

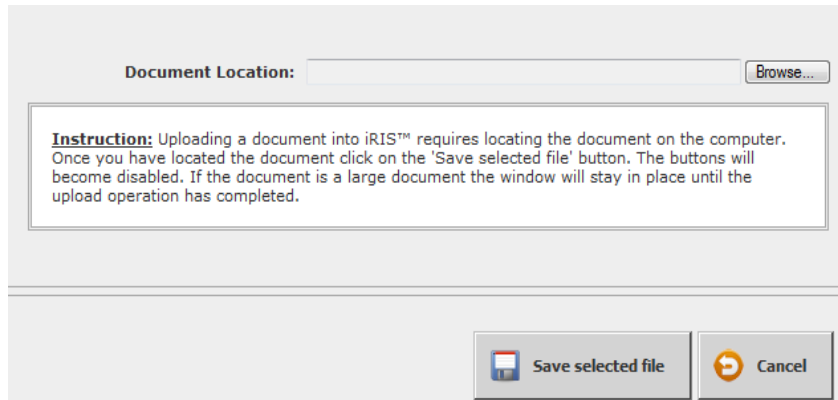
**Download/Upload Associate Configuration** gives you the ability to easily upload an Excel file with as many business associate records as needed at one time.



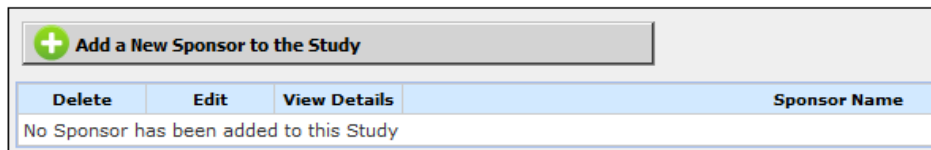
**Download Associate Configuration Template** – This feature will allow you to download a spreadsheet template; this template is set up in the proper format for uploading associate records, with instructions for the input of data in each field. When downloading, be sure to **Save** the file to a known location on your computer, so the data can be input and saved for future uploading. Below you will find a screenshot of this spreadsheet template.

	Z	AA	AB	AC	
1	<b>A 133 Non Profit</b>	<b>A 133 Unknown</b>	<b>A 133 NA</b>	<b>Risk Assigned(Only if the Vendor or Subrecipient is Yes)</b>	<b>Vendor Number</b>
2	No more than 3 characters	No more than 3 characters	No more than 3 characters	No more than 32 characters	No more than 3
3	Yes or No	Yes or No	Yes or No	High	
4	Yes	Yes	Yes		
5					
6					

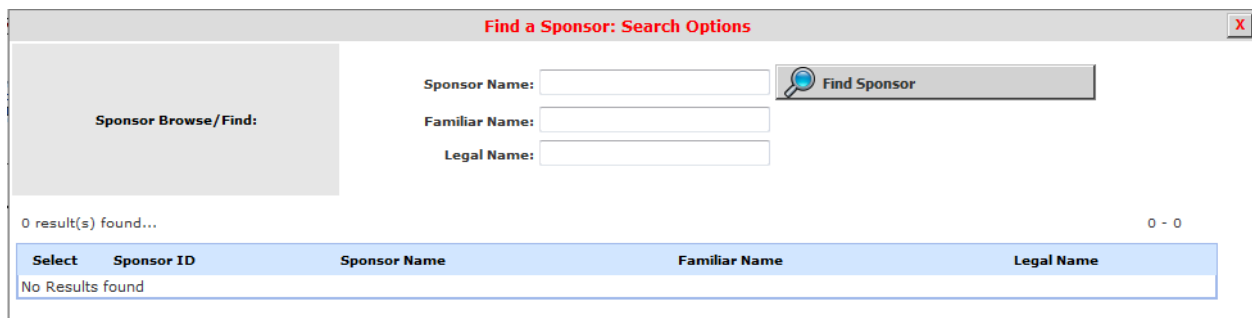
**Upload Associate Configuration**– Selecting to upload the device configuration will open a popup window, where you will be able to browse for the correct Excel file containing the associate records you wish to upload.



**How these configurations affect iRIS** – Once a Business Associate / Sponsor has been added to the master list, they become available to be associated to Study Applications through a data value.



Selecting **Add a New Sponsor** to the Study will display a popup window, which will allow the user to search for the applicable business associate.



## Sponsor Type

This is a list of available Sponsor Types that you can associate to a Sponsor record.

After selecting this link, the master list of existing Sponsor Types will display. You can **Edit** the existing, as well as **Add a New Category** and **Delete**, as seen in the image below.

System Administration - Define Sponsor Type					
Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		Personal	1	Yes	
		Federal - NIH	1	Yes	
		Pharmaceutical	1	Yes	
		Private - Non-profit	1	Yes	

**Add a New Category** will direct you to the following screen.

System Administration - Define Sponsor Type	
<a href="#">Back</a>	
<a href="#">Save Category</a>	
*Sponsor Type:	<input type="text"/>
*Sort Order Number:	<input type="text" value="1"/>
*Include Sponsors of this group in Disclosure Search:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description:	<input type="text"/>

**Sponsor Type** – Here you are required to designate the display name for the Sponsor Type record.

**Sort Order Number** – Set the order of the way that you want the Sponsor Types to display.

**Include Sponsors of this group in Disclosure Search** – This setting is used for the COI module. Any sponsor associated to a Sponsor Type with this flag set to **YES** will be included in the conflict of interest check. This means that when a Covered Person submits a conflict of interest form with a conflict match listing a sponsor with this type, the system will flag a COI match and report it to the Conflict of Interest board.

**Description** – Here a description related to the type can be added. This field is for internal purposes, and will not be displayed to end users.

Click **Save Category** to save the sponsor type. It will be added to the master list and will be made available to associate to a sponsor record.

## Study Document Outcome/Outcome Configuration List

You can create Outcomes for any Study Documents reviewed by the board.

When you open the page, a list of any current Study Document Outcomes will display. If you have not set up any outcomes, the page will not list any records.

You can add a new outcome by clicking on the **Add a New Status** button.

IACUC - Review Board Setup Study Document Outcome <span style="float: right;">Back</span>						
						<input type="button" value="+ Add a New Status"/> <input type="button" value="X Delete Selected Status(s)"/>
IACUC list of study document outcomes.						
<input checked="" type="checkbox"/>	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
<input type="checkbox"/>		Approved	Yes	Yes	No	No
<input type="checkbox"/>		Not Approved	No	No	No	No

A new page will open allowing you to input the Outcome Status information.

**Create PDF** – Set this option to “Yes” if you need the document given this outcome to convert to a PDF. This option should be set to “Yes” for any document that you want to apply your electronic document stamp to. Leave this set to “No” to leave the document as it was submitted.

IACUC - Review Board Setup Study Document Outcome <span style="float: right;">Back</span>	
<input type="button" value="Save Study Document Outcome"/>	
IACUC add a review outcome.	
*Outcome Status:	<input type="text"/>
*Create PDF:	<input type="radio"/> Yes <input checked="" type="radio"/> No

Once you set Create PDF to “Yes”, three additional options will be available, described below.

*Create PDF:	<input checked="" type="radio"/> Yes <input type="radio"/> No
*Use Approved Stamp:	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Use Void Stamp:	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Start From Original Document:	<input type="radio"/> Yes <input checked="" type="radio"/> No

**Use Approved Stamp** – This option will not be available if the Review Board Property “rb.stamp\_study\_doc” under the Document Processing Category is not on. When this property is on, and the option here is set to “Yes,” then a study document assigned with this outcome will be stamped with an Approval Stamp (stamps can be set up for particular categories in the Review Board Administration).

**Use Void Stamp** – Setting this option to “Yes” will create a **VOID** watermark on the study document when it is converted to PDF.

**Start From Original Document** - This option will specify whether the outcome set and saved will apply to the original document or a PDF already created from the study document outcome being set in the past. This option is applicable if review boards often return to the study document to re-process it and assign it another outcome. For example, when setting a document stamp to void, and a void watermark is stamped, then later on approving the document, this “Start from Original Document” option should be set to “Yes” so that the **VOID** watermark is no longer present on the document.

When you are finished entering the necessary information, click the **Save Study Document Outcome** button.

Study Number: M3  
 PI: Investigator, Susan M., Ph.D. **Study Documents**

\*Document Title: Vertebrate Animal Section

\* Category: Other

Comments:

Description:

\*Version Date: 07/02/2014

Version Number: 1.0

Outcome: --none--  
 --none--  
 Approved  
 Not Approved

Approval Date:

Expiration Date:

The Study Document Outcomes will populate in the Outcome drop down list when you are approving a Study Document on a study within the submission processing screens.

## Study Status Configuration List

This will create and maintain the status for studies as well as determine what user access is allowed during particular statuses and assign different colors to each status. Study statuses are used for every stage in the life of a study, from the moment the study is first drafted until the study is inactive.

The IACUC review board has access to maintain the Study Status list; however, this list is shared between System Administration and any other review board set up in the system. Typically it is the study’s overseeing review board that maintains the study status of a particular study but the IACUC office can have the ability to modify the Study Status for a study if the review board property `rb.allow_change_of_study_status` is set to “Yes.”

Study Status formulary <span style="float: right;">◀ Back</span>									
<span style="color: green;">+</span> Add a new Study status									
10 result(s) found...									
Delete	Edit	Status Name	Sort Order	Default for Expired Studies	Continuing Review Reporting	Auto Expire?	Available to Archive	Include in COI Match	Color
		Open	1	No	Included	Yes	No	Yes	
		Returned for Corrections	1	No	Not Included	No	No	No	
		Pending Acceptance to Participate	2	No	Not Included	No	No	Yes	
		Draft	2	No	Not Included	No	No	Yes	
		Pending	3	No	Not Included	No	No	Yes	
		Pending - Submitted for Initial Review	4	No	Not Included	No	No	Yes	
		Closed to Accrual with follow-up	5	No	Included	Yes	No	Yes	
		Closed	8	No	Not Included	No	No	Yes	

The **Delete** column is used to delete a status. Some of the statuses do not have icons. This means they cannot be deleted from the system because they are hard coded and required by the system to run properly. To delete a study status, click the icon next to the study status.

The **Edit** column contains icons that you can click to open information about the status and edit. Some of these statuses cannot be edited for the same reason they cannot be deleted. You may still view the read/write information for them.

The **Sort Order** column determines not only how the statuses are grouped here, but also in what order they appear to the Review Board and when viewing studies in **Find a Study** or **My Studies in Study Assistant**.

The **Default for Expired Studies** column indicates if a certain status is the default in iRIS for an expired study. This means that when a Review Board Expiration Date comes and goes, the system will automatically set the study to this status. There should be only one status with this option turned on.

The **Continuing Review Reporting** column indicates if continuing review reporting is included with this study status. If this reads **Included**, then continuing review reporting is included. If this reads **Not Included**, then continuing review reporting is not included in this status.

**Auto Expire** indicates whether the system checks studies in that status to see whether or not the Review Board Expiration Date has come and gone.

**Available to Archive** indicates whether or not you can archive studies in this status. **\*Used with IACUC modules.**

**Include COI Match** indicates whether the system checks a study in this status for sponsor information when a Covered Person submits a form. If the Covered Person has a role on the study and has indicated a submission with a sponsor on the study and the study is in a status that includes the COI check, a Submission will trigger. **\*Used with COI modules**

The **Color** column contains a sample of the assigned color for this status.

To create a new study status, click on the **Add a New Study Status** button.

The screenshot shows the 'Setup System Study Status' form with the following details:

- Study Status:** Open
- Sort Order:** 1
- Default for Expired Studies:**
- Continuing Review Reporting:**  Not Included  Included
- Auto Expired?:**  Yes  No
- Include for Conflict of Interest Match?:**  Yes  No
- Available to Archive:**  Yes  No
- Operations Allowed:**
  - Allow Study Management Access
  - Allow Study Management Access But Read Only
  - Study in Creation Mode( i.e Draft )
  - Allow Submissions
  - Allow Key Study Personnel Change
  - Allow Subject Access
  - Allow Subject Enrollment
- Color:** A row of color swatches (grey, red, orange, yellow, green, cyan, blue, purple, pink).

The Setup System Study Status page opens. The first two fields are required fields. **Study Status** is the actual name of the status. This will be associated with any study that is set to this status.

**Sort Order** – enter a number here to determine where in the list with the other statuses this status will appear. You can only enter a whole, non-negative number in this text box.

**Default for Expired Studies** – click the checkbox to indicate if a certain status is the default in iRIS for an expired study. This means that when a Review Board Expiration Date comes and goes, the system will automatically set the study to this status. There should be only one status with this option turned on.

**Continuing Review Reporting** – Select either **Not Included** or **Included** depending on whether or not you want to allow continuing review reporting with this study status. Only one of these can be selected at a time.

**Auto Expired?** – select “Yes” to indicate whether the system checks studies in that status to see whether or not the Review Board Expiration Date has come and gone.

**Include for Conflict of Interest Match** – select “Yes” to indicate whether the system checks a study in this status for sponsor information when a Covered Person submits a form. If the Covered Person has a role on the study, has indicated a conflict with a sponsor on that study, and the study is in a status that includes the COI check, a conflict match will trigger. **\*Used with the COI Module**

**Available to Archive** – select “Yes” to indicate whether or not you can archive studies in this status.

**Operations Allowed** – This is the area that determines user access and changes to the study when it is set to this status. The first two items (highlighted yellow) determine whether KSP have access to the study while the study is in this status. If the first checkbox (Allow Study Management Access) is checked, any KSP associated to the study can open the study and make changes. If the second option (Allow Study Management Access But Read Only) is selected, the KSP would have access to the study, but they would not be able to make changes. Both of these can be selected at once, but this is not recommended. If neither checkbox is selected, KSP will not be able to access the study through My Studies or Find a Study in Study Assistant.

The rest of the options are as follows:

**Study in Creation Mode** – This property allows the study to act like a Draft status.

**Allow Submissions** – With this status active, if this is checked, then KSP can send a submission to the Review Board. If it is not checked, forms cannot be submitted.

**Allow Key Study Personnel Change** – If this is checked the KSPs associated to the study can be added or removed from the study.

**Allow Subject Access** – When this checkbox is checked, subject management is allowed. If it is not checked, you cannot modify the subjects associated with the study. **\*Used with Subject Management modules**

**Allow Subject Enrollment** – When this checkbox is checked, you are able to enroll subjects to the study. If it is not checked, you cannot enroll subjects to the study. **\*Used with Subject Management modules**

The color palette is located at the bottom of the screen. To change the color of the status, click on the desired color.

The present color shows in the large box next to the color palette. Make any necessary changes to the status, then click the **Save the study status** button.

The new study status will appear in the list of study statuses. It will appear in the order you choose in the **Sort Order** text box.

The screenshot displays the 'IACUC - Initial Review Submission Form' interface. At the top, it shows 'Study Number: M3' and 'PI: Investigator, Susan M., Ph.D.'. The main form area is divided into sections: 'Protocol Items', 'Miscellaneous', 'IACUC Items', and 'Submission Forms'. The 'Study Status' dropdown is highlighted with a red box, showing 'Pending - Submitted for'. Below this, the 'IACUC Review Outcome' section contains a 'Review Outcome' dropdown (set to '--none--'), 'Additional information required' (set to 'No'), and a 'Submission Approval' field. A 'Save the Submission Outcome' button is located at the bottom right. A sidebar on the left lists various navigation options like 'Correspondence', 'Submission History', and 'Review Checklist and Comments'.

All the study statuses that are in this list will appear on the Review Board side. In the screenshot above, the IACUC Coordinator will set the status of the study based on the outcome determined in a review board meeting. The dropdown list contains the study statuses. The study status appears along with the Study Title and Expiration Date for the study in the header.

**IACUC - Find a Study** Back

Find a Study Filters

Display Projects by: IACUC Number	Study Status: Pending - Submitted for Initial Review
Study Number:	Study Classification: All
Sponsor:	Reference Number:
Active Principal Investigator:	IACUC Number: All
Department:	IACUC Expiration Date:
	IACUC Full Renewal Expiration:

**Advanced Find Options**  
Reset Find Options  
Find ...

1 result(s) found...

1 - 1

Open	Study Status	IACUC Number	IACUC Expiration Date	Study Number Study Title	Principal Investigator	Sponsor
	Pending - Submitted for Initial Review	GH-15001		Mouse Study Mouse Study	Investigator, Susan	

The study status will also appear next to studies when you are in **Find a Study** both on the Review Board side and Study Assistant. The screenshot above is for **Find a Study** on the **IACUC Assistant** and lists all of the studies for a particular Principal Investigator.

Study Number: M3  
PI: Investigator, Susan M., Ph.D. **Submissions** Back

Study Status: Pending - Submitted for Initial Review Study Title: Mouse Study

Submissions Study Management

Protocol Items	Submissions History
Study Application	Study Correspondence
Other Study Documents	

The study status also shows in any screen associated with a study.

Study Number: M3  
PI: Investigator, Susan M., Ph.D. **Study Summary** Back

Study Status: Pending - Submitted for Initial Review Study Title: Mouse Study

Save Changes

**Study Summary Basic Information**

Study Title: Mouse Study	Status: Pending - Submitted for Initial Review
Study Number: M3	
Phase:	Coordinating Study Number:
Storage Code:	Animal Research: <input checked="" type="radio"/> Yes <input type="radio"/> No
Blinding Method:	Research Type:
VA Number:	Therapeutic Area:

Within the IACUC Review Board, if the review board property `rb.allow_change_of_study_status` is set to "Yes," you will be able to change the study status for a particular study by accessing the study through Find A Study. Navigate to the Study Summary/Profile and the Study Status drop down list will be available for you to set.

## Substance Configuration List

This configuration list will allow you to specify a pre-defined list of Substances that you can then associate to a specific species on a study.

System Administration - Configure Substance								Back
3 result(s) found...								1 - 3
<input checked="" type="checkbox"/>	Edit	Species name	Substance	Route	Dose	Frequency	Expected Effect	Possible Side Effect
<input type="checkbox"/>		Mouse	Corn oil	Oral	23			
<input type="checkbox"/>		Mouse	Saline	Oral	20			
<input type="checkbox"/>		Mouse	Tamoxifen	Oral	34			

When you open the page, a list of any Substances previously defined will display. If Substances have not yet been added, this page will not list any records. You can click the **Add a New Record** button to add a new Substance to the list.

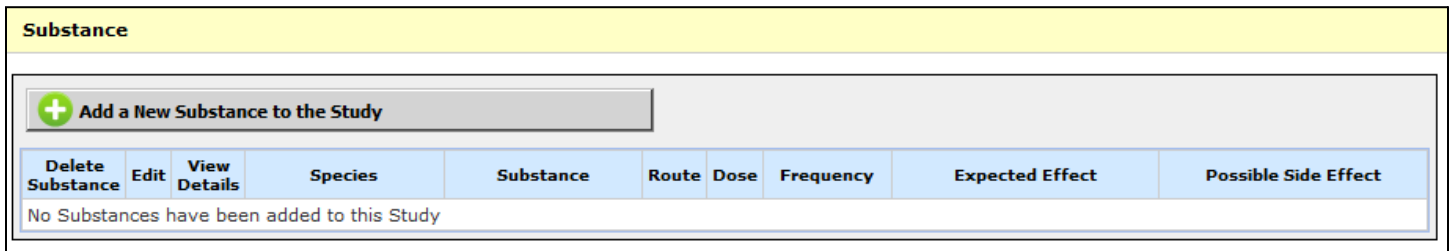
System Administration - Configure Substance		Back
*Species Name:	--none--	
*Substance:	--none--	or create New <input type="text"/>
*Route:	--none--	or create New <input type="text"/>
*Dose:	<input type="text"/>	
*Frequency:	<input type="text"/>	
*Expected Effect:	<input type="text"/>	
*Possible Side Effect:	<input type="text"/>	

When you add a new record, you will first need to select a **Species Name** from the drop down list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a Species Name, select the **Substance** from the drop down list. If the specific Substance you need to add for this species is not listed, you can create the record by typing it in to the **Create New** field to the right of the Substance dropdown list. Associate the **Route** in the same way; select the proper Route from the dropdown list. Otherwise, enter a new record in the **Create New** field. Once you have selected the appropriate records from the dropdown lists or created new records, specify the **Dose** and enter the **Frequency**, **Expected Effect**, and **Possible Side Effect** information. Click the **Save Changes** button, and the record will be added to the list of Substances.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Species Name, Substance, Route, Dose, Frequency, Expected Effect, and Possible Side Effect information.

You can delete a record by selecting the checkbox next to the appropriate Substance record and clicking on the **Delete Record(s)** button.

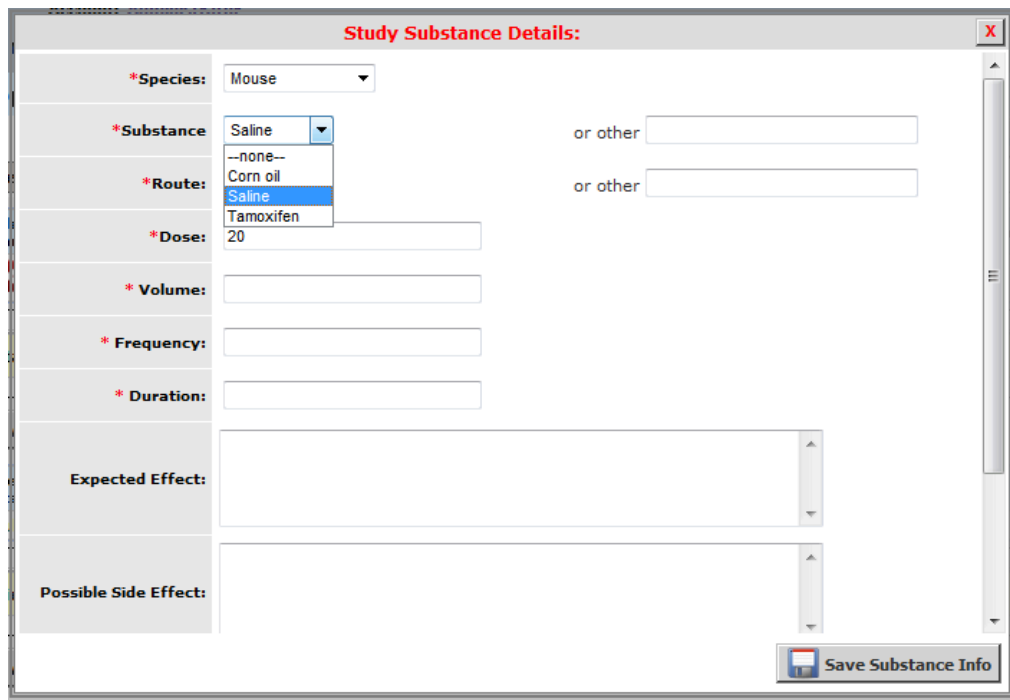
The Substance records added to the Substance Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Substance records, as shown in the screenshot below. The user can click the **Add a New Substance to the Study** button.







A window will open within the browser, allowing the user to associate Substance information. Because the Substance records have been configured to specific species, only information associated to the selected **Species** in the dropdown list will display. Also note that only species associated to the study will display in the **Species** drop down list.

Once a Substance and Route are selected for the Species, the remaining supplied information will populate on the page. The user can change any of this information as needed, and the user can also add any Substance or Route that may not have been configured in the Substance Configuration List.

Once the information has been added, the user will click the **Save Substance Info** button at the bottom of the window.









The Substance record will display in the table below the **Add a New Substance to the Study** button. If additional Substance records need to be added to the study, the user can click this button again to repeat the process.


Substance									
<div style="border: 1px solid gray; padding: 5px; display: inline-block;">  Add a New Substance to the Study         </div>									
Delete Substance	Edit	View Details	Species	Substance	Route	Dose	Frequency	Expected Effect	Possible Side Effect
			Mouse	Saline	Oral	.2 mg	1x	Testing for procedure	N/A

## Strain Configuration List

This configuration list will allow you to specify a pre-defined list of Species Strain records that you can then associate to a study.

System Administration - Configure Species Strain				Back
			<div style="display: inline-block; margin-right: 10px;">  Add a New Record         </div> <div style="display: inline-block;">  Delete Record(s)         </div>	
616 result(s) found...				1 - 30
<input type="checkbox"/>	Edit	Species name	Strain	
<input type="checkbox"/>		Mouse	(Mer-Cre-Mer) Cre	
<input type="checkbox"/>		Mouse	1-alpha h'ase KO	
<input type="checkbox"/>		Mouse	11kbBrn3a-mut/CreERT2 (on B6)	
<input type="checkbox"/>		Mouse	11kbBrn3a-mut/LacZ (on B6)	

When you open the page, a list of any Species Strain records previously defined will display. If Species Strain records have not yet been added, this page will not list any records. You can click **Add a New Record** to add a new Species Strain to the list.


System Administration - Configure Species Strain		Back
		<div style="border: 1px solid gray; padding: 2px; display: inline-block;">  Save Changes         </div>
*Species Name:	<input type="text" value="--none--"/>	
*Strain:	<input type="text"/>	

When you add a new record, you will first need to select a **Species Name** from the drop down list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a Species Name, enter the **Strain**. Click the **Save Changes** button, and the record will be added to the list of Strains.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Species Name and Strain.

You can delete a record by selecting the checkbox next to the appropriate Species Strain record and clicking on the **Delete Record(s)** button.

The Strain records added to the Strain Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Strain records, as shown in the screenshot below. The user can click the **Add a New Strain to the Study** button.





Species Strain							
<div style="border: 1px solid gray; padding: 2px; display: inline-block;">  Add a New Strain to the Study         </div>							
Delete Strain	Edit	View Details	Species	Strain	Stock # / Order Code:	Special Care	Special Conditions
No Strain(s) have been added to this Study							

A window will open within the browser, allowing the user to associate Strain information. Because the Strain records have been configured to specific species, only information associated to the selected **Species** in the drop down list will display. Also, note that only species associated to the study will display in the **Species** drop down list.

Once a Species and Strain are selected, the remaining information can be input on the page. The user can change any of this information as needed, and the user can also add any Strain that may not have been configured in the Strain Configuration List.

Once the information has been added, the user will click the **Save Strain Info** button at the bottom of the window.

The Strain record will display in the table below the **Add a New Strain to the Study** button. If additional Strain records need to be added to the study, the user can click this button again to repeat the process.

Species Strain							
<div style="border: 1px solid gray; padding: 2px; display: inline-block;">  Add a New Strain to the Study         </div>							
Delete Strain	Edit	View Details	Species	Strain	Stock # / Order Code:	Special Care	Special Conditions
			Mouse	Isogenicity	123234234234		

## IACUC Drug Configuration List

The IACUC Drug Configuration List allows you to add or edit drug records specific to the IACUC. These IACUC Drug records can be associated to an IACUC study.

After selecting this link the master list of existing IACUC Drugs will display. You will have the ability to **Edit** existing IACUC Drugs as well as **Merge IACUC Drug Records**, **Add a New IACUC Drug**, and **Delete IACUC Drug(s)**, as seen in the image below.

This page contains a **Search By** filter which allows you to search for specific drugs that have been previously added.

**System IACUC Drug List** Back

Merge IACUC Drug Records + Add a New IACUC Drug

IACUC Drug Browse/Find: Drug Name:  Find ...

4 result(s) found...

Delete	Edit	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
		3	Buprenex	Buprenorphine	
		1	Ketalar	Ketamine	
		2	Nembutal	Sodium pentobarbita	
		4	Stadol	Butorphanol	

### Add a New IACUC Drug

**Add a New IACUC Drug** will allow you to add a new drug to the master IACUC Drug list within iRIS. To add a new drug, you must enter the Trade Name, Generic Name, or Investigational Name. Only one of the three drug names is needed to add a new record to the system. Clicking the **Save Changes** button will add this drug record to the master IACUC Drug list.

**System IACUC Drug List** Back

Save Changes

Add a new drug to the system.

Trade Name:

Generic Name:

If not yet named, Investigational Name:

### Merge IACUC Drug Records

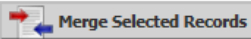
Also listed at the top of the page is the **Merge IACUC Drug Records** button. This will allow you to manage your list of IACUC Drugs by merging duplicate records into one record as needed. Users adding IACUC Drugs to a study can add a drug record to this master list if they cannot find the IACUC Drug they need on the study. Merging IACUC Drugs allows you to manage the list of user-added IACUC Drugs in the case that an IACUC Drug record already exists in the master list. To merge IACUC Drug records, click the **Merge IACUC Drug Records** button.

**System IACUC Drug List** Back

Merge IACUC Drug Records + Add a New IACUC Drug

A new page will open, listing the available IACUC Drugs. Choose two or more records to merge, and then click the **Merge Selected Records** button.

**System IACUC Drug Merge** ◀ Back



Select two or more records to merge.

<input type="checkbox"/>	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
<input checked="" type="checkbox"/>	5		IACUC Drug1	
<input checked="" type="checkbox"/>	6		IACUC drug 1	
<input type="checkbox"/>	3	Buprenex	Buprenorphine	
<input type="checkbox"/>	1	Ketalar	Ketamine	
<input type="checkbox"/>	2	Nembutal	Sodium pentobarbita	
<input type="checkbox"/>	4	Stadel	Butorphanol	

The page refreshes to list only the IACUC Drug records you selected. At this point, you need to indicate which IACUC Drug record to keep by selecting the radio button next to the IACUC Drug. Then, click the **Merge** button. If you do not want to merge any records, click the **Cancel** button and you will be returned to the previous page.

**System IACUC Drug Merge** ◀ Back

Select the record you want to keep after merging.

	Trade Drug Name	Generic Drug Name	Investigational Drug Name
<input type="radio"/>		IACUC Drug1	
<input checked="" type="radio"/>		IACUC drug 1	

When you merge two or more records, the IACUC Drug you selected to keep will remain in the master configuration list and will also be applied to any study records using the other IACUC Drug records. Example: The above case is merging two drugs, "IACUC Drug1" and "IACUC drug 1." The correct IACUC Drug in the master list is "IACUC drug 1;" however, a user added "IACUC Drug1" to a study, and the IACUC Drug record was created in the master list. When these two records are merged, "IACUC Drug1" is no longer found in the master list, and is replaced by "IACUC drug 1" within the study that had referenced "IACUC Drug1."

### IACUC Drug Functionality

Any IACUC Drug records added to the IACUC Drug Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the selection of the Drugs, as shown in the screenshot below. The user can click the **Add a New Drug to the Study** button.

+ Add a New IACUC Drug to the Study

Delete Drug	Edit	View Details	Drug Name	FDA Approved	A new drug or a new use of approved drug:	IND Number
No drugs have been added to this Study						

A window will open within the browser, allowing the user to search the system for the appropriate Drug record. The user can use the **Drug Name** field to find a particular drug; otherwise, leaving that field blank and clicking the **Find Drug** button will return all results.

If the desired Drug record is not found in the list, the user has the option to add a Drug by clicking on the **Add a New IACUC Drug** button.

Select	Internal Rec Num	Z A Trade Drug Name	Generic Drug Name	Investigational Drug Name
	4	Stadol	Butorphanol	
	2	Nembutal	Sodium pentobarbita	
	1	Ketalar	Ketamine	

The window will change, allowing the user to input the same Drug information gathered when adding a Drug through the Drug Configuration List. Once the necessary information is added, the user will click on the **Save Drug Info** button and the Drug will be added to the study as well as the Drug Configuration List.

## Tranquilizing Drug Configuration List

This configuration list will allow you to specify a pre-defined list of Tranquilizing Drugs that you can then associate to a specific species on a study.

Edit	Species name	Tranquilizing Drug	Route	Dose	Monitor
<input type="checkbox"/>	Mouse	Telazol	Injection	.5 mg	Normal monitoring procedures

When you open the page, a list of any Tranquilizing Drugs previously defined will display. If Tranquilizing Drugs have not yet been added, this page will not list any records. You can click **Add a New Record** to add a new Tranquilizing Drug to the list.

**System Administration - Configure Tranquilizing Drug** ← Back

Save Changes

\*Species Name:

\*Tranquilizing Drug:  or create New

\*Route:  or create New

\*Dose:

\*Monitoring:

When you add a new record, you will first need to select a **Species Name** from the dropdown list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a Species Name, select the **Tranquilizing Drug** from the dropdown list. If the specific Tranquilizing Drug you need to add to this species is not listed, you can create the record by typing it in to the **Create New** field to the right of the Tranquilizing Drug drop down list. Associate the **Route** in the same way; select the proper Route from the drop down list. Otherwise, enter a new record in the **Create New** field. Once you have selected the appropriate records from the dropdown lists or created new records, specify the **Dose**, and enter the **Monitoring** information. Click the **Save Changes** button, and the record will be added to the list of Tranquilizing Drugs.

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page allowing you to modify the Species Name, Tranquilizing Drug, Route, Dose, and Monitoring information.

You can delete a record by selecting the checkbox next to the appropriate Tranquilizing Drug record and clicking on the **Delete Record(s)** button.

The Tranquilizing Drug records added to the Tranquilizing Drug Configuration List will be available to add to an IACUC study. Within the IACUC Application, users will be presented with a data value that will allow the association of Tranquilizing Drug records, as shown in the screenshot below. The user can click the **Add a New Tranquilizing Drug to the Study** button.

**Tranquilizing Drug**

+ Add a New Tranquilizing Drug to the Study

Delete Tranquilizing Drug	Edit	View Details	Species	Tranquilizing Drug	Route	Dose	Monitoring
No Tranquilizing Drugs have been added to this Study							

A window will open within the browser, allowing the user to associate Tranquilizing Drug information. Because the Tranquilizing Drug records have been configured to specific species, only information associated to the selected **Species** in the drop down list will display. Also, note that only species associated to the study will display in the **Species** dropdown list.

Once a Tranquilizing Drug and Route are selected for the Species, the remaining supplied information will populate on the page. The user can change any of this information as needed, and the user can also add any Tranquilizing Drug or Route that may not have been configured in the Tranquilizing Drug Configuration List.

Once the information has been added, the user will click the **Save Tranquilizing Drug Info** button at the bottom of the window.

The Tranquilizing Drug record will display in the table below the **Add a New Tranquilizing Drug to the Study** button. If additional Tranquilizing Drug records need to be added to the study, the user can click this button again to repeat the process.

Tranquilizing Drug							
<div style="border: 1px solid gray; padding: 2px; display: inline-block;"> <span style="color: green; font-weight: bold;">+</span> Add a New Tranquilizing Drug to the Study                 </div>							
Delete Tranquilizing Drug	Edit	View Details	Species	Tranquilizing Drug	Route	Dose	Monitoring
			Mouse	telazol	injection	1 ml	

### USDA Class Configuration List

USDA Classes can be configured and then associated to IACUC study records in the system. You can manage the current list of USDA Class records by accessing this page.

When you open the page, a list of any USDA Class records previously defined will display. If USDA Class records have not yet been added, this page will not list any records. You can click the **Add a New Record** button to add a new USDA Class record to the list.

System Administration - USDA Class		
Delete	Edit	USDA Class
		A
		B
		C
		D
		E

When you add a new record, you will need to enter the **USDA Class** and click the **Save Changes** button. The record will be added to the list of USDA Class records.

**System Administration - USDA Class** Back

---

\* USDA Class:

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the USDA Class information.

You can delete a record clicking the icon in the **Delete** column.

USDA Class information can be set for a specific study within the Outcome tab of the Submission Processing screens.

Study Number: M3 Back  
 PI: Investigator, Susan M., Ph.D. **IACUC - Initial Review Submission Form**

Protocol Items	Miscellaneous	IACUC Items	Submission Forms
Ref Number: <b>000215</b>	Study Title: Mouse Study		
Study Status: Pending - Submitted for			

---

- Submission Components
- Correspondence
- Submission History
- Pre-review Screening
- Submission Received Notification Letter
- Review Checklist and Comments
- Review Summary
- Submission Discussion
- Recommendation
- Stipulation
- Internal Submission

**Take Note:**

Meeting Date: 07/25/2014

Review Cycle: --none--

Teaching:  Yes  No

Type Assigned: --none--

Temporary Closed:  Yes  No

Temporary Closure Start:

IACUC Initial Approval:   
 IACUC Expiration:    
 USDA Class: --none--  
 Last Continuing Review Approved:   
 Continuing Review Start:

This information will also display within the Study Profile.

## Vaccination Configuration List

Vaccination records can be configured and then associated to IACUC study records in the system. You can manage the current list of Vaccination records by accessing this page.

When you open the page, a list of any Vaccination records previously defined will display. If Vaccination records have not yet been added, this page will not list any records. You can click the **Add a New Record** to add a new Vaccination record to the list.

System Administration - Configure Vaccination			
			<a href="#">Back</a>
			<a href="#">+ Add a New Record</a> <a href="#">X Delete Record(s)</a>
2 result(s) found...			1 - 2
<input type="checkbox"/>	Edit	Species name	Vaccination
<input type="checkbox"/>		Pig	Erysipelas
<input type="checkbox"/>		Pig	Tetanus

When you add a new record, you will first need to select a **Species Name** from the drop down list. This list will contain the list of species configured in the Animal Species Configuration List. Once you select a Species Name, enter the **Vaccination** information. Click the **Save Changes** button, and the record will be added to the list of Tranquilizing Drugs.

System Administration - Configure Vaccination	
<a href="#">Back</a>	
<a href="#">Save Changes</a>	
*Species Name:	--none--
*Vaccination:	<input type="text"/>

Records can be edited by clicking on the **Edit** icon next to the name. This will open a new page, allowing you to modify the Species Name and Vaccination information.

You can delete a record by selecting the checkbox next to the appropriate Vaccination record and clicking on the **Delete Record(s)** button.



Vaccination Records added to the Vaccination Record Configuration List are available to associate to users within IACUC's User Vaccination History. For more information, see the IACUC Assistant Manual.

User Administration - Add User Vaccination Record	
<a href="#">Back</a>	
<a href="#">Save Vaccination Record</a>	
*User Selection:	Mary Jane Coordinator, R.N.
*Vaccination Name:	--none--
*Vaccination Status:	<input type="radio"/> none <input type="radio"/> Erysipelas <input type="radio"/> Tetanus
Use Automatic Expiration of Vaccination flag:	<input type="radio"/> On <input type="radio"/> Off
Administered Date:	<input type="text"/>
Expiration Date:	<input type="text"/>

## Issue Reporting Types

The Issue Reporting Types page lists the current issue types that can be assigned to the study.

You can add a new Issue Type by clicking the **Add an Issue Type** button.

IACUC - Issue Type List <span style="float: right;">← Back</span>			
		<span style="border: 1px solid gray; padding: 2px;">+ Add an Issue Type</span> <span style="border: 1px solid gray; padding: 2px; margin-left: 10px;">✖ Delete Selected Issue Type(s)</span>	
<input checked="" type="checkbox"/>	Edit	Order Number	Issue Type
<input type="checkbox"/>		1	Non-Compliance
<input type="checkbox"/>		2	Failure to Report

This will bring you to the Issue Type setup page. You will be required to enter the order number and the issue type. Once you have entered this information, click the **Save Item Order** button and the issue will be added to the Issue Type List.

IACUC - Issue Type List <span style="float: right;">← Back</span>	
<span style="border: 1px solid gray; padding: 2px;">Save Item Order</span>	
<b>*Order Number:</b>	<input type="text" value="1"/>
<b>*Issue Type:</b>	<input type="text"/>

You can add the issue to a study from the Study Summary information page from the Miscellaneous menu tab on the submission processing screens. Once you are on the Study Summary page, click the **Add** button next to the Study Issue Report section.

Study Issue Reporting <span style="float: right;">+ Add</span>			
<input checked="" type="checkbox"/>	Issue Type	Issue Date	Issue Details
No record found			

This will open the study issue reporting details window, where you can specify the Issue Type, Issue Date, and Issue Details. After you are done entering the Issue details click the **Save Details** button to add the issue to the study.

## Clean-up

This tab within Review Board Administration contains a link that will allow the review board administrator to transfer tasks from one staff member to another. In addition, the Document Management functionality allows you to

## Transfer Outstanding Tasks

This area allows you to reassign a user’s incomplete tasks to another user. This can be used when an IACUC Coordinator leaves the institution and all their tasks needed to be transferred to their replacement.

To use this option, click the **Transfer outstanding tasks** link. This will populate a new page where you can select the user whose tasks need to be transferred. The system will pull all their incomplete tasks and put them in a list:

Then, check the box next to the tasks desired for transfer and select the user that will accept these tasks from the dropdown menu. Click the **Transfer Task to New User** button at the top right of the screen.

**Transfer RB Tasks** ◀ Back

**Transfer task to new user**

<b>Select the user that tasks are currently assigned to:</b>	<b>Select the user who will accepts these tasks:</b>
Administrator ▼	Coordinator, Mary Jane, R.N. ▼

☑	Study Title/ Task type
☑	Assigned Analyst

The user who has accepted the tasks will be able to open and complete the task from their home screen.

## Document Management

The Document Management functionality allows you to manage the documents associated with a study.

When you click the link, you will be brought to the IACUC – Find a Study screen. You can use the filters at the top of the screen to locate the study you wish to manage documents for. In the screenshot below, the IACUC Number filter was used to find a study. Enter the desired search terms in the Find a Study Filters and click **Find**.

**IACUC - Find a Study** ◀ Back

Find a Study Filters ⓘ

Display Projects by: IACUC Number ▼ Study Nickname: <input type="text"/> Sponsor: <input type="text"/> <input type="checkbox"/> Active Principal Investigator: <input type="text"/> Department: <input type="text"/>	IACUC Number: ANI-16-498 Study Status: All ▼ Study Classification: All ▼ Reference Number: <input type="text"/> IACUC Expiration Date: <input type="text"/> - <input type="text"/> IACUC Full Renewal Expiration: <input type="text"/> - <input type="text"/>	<input type="button" value="Reset Find Options"/> <input type="button" value="Find ..."/>
--	--	--

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

Select	Study Status	IACUC Number	IACUC Expiration Date	Study Nickname	Principal Investigator	Sponsor
			IACUC Full Renewal Expiration	Study Title		
	Active	ANI-16-498		Animal Study 4 <i>Animal Study</i>	Investigator, Susan	

Click the in the record for the study you wish to open. This will bring you to the Document Management screen.

Different review boards may also want to select Consent documents on this screen, which can be selected using the Document Type radio button. You can also filter by document/consent Category, Version Number, Approval Date range, document Title, Document Outcome, and Expiration Date range.

IRB Number: **HUMANPROTOCOL--2016-1558** **Document Management** Back

Study Nickname: ANALATRO  
 PI: Investigator, Susan

Study Status: **Approved** IRB Number: HUMANPROTOCOL--2016-1558 IBC Number: IBC-16-073 Study Title: ANALATRO - A Phase III Multicenter Clinical Trial of Analatro [Antivenin Latroectus (Black Widow) Equine Immune F (ab)2] in

Please follow the next steps:  
 -Select a root document.  
 -Select the documents that you want to associate.  
 -Review your selections.  
 -Apply changes.

**Associate Study Documents or Consents**

Select Category: All  
 Version #: . 0  
 Approval Date: between  
 Title: Document Outcome: All  
 Expiration Date: between  
 Document Type:  Documents  Consents

Filter Documents

Select Root Consent	Version	Title/ Category	Document Outcome	Approval Date	Expiration Date	File
+	1.0 07/07/2016	Consent Document Study Consent Category I				
+	1.0 07/07/2016	Informed Consent <b>*Revision modified by the IRB</b> Study Consent Category I				

In the Select Root Document column, you will see all the study documents associated with the study you selected that are version 1.0. These are the root documents that you will be merging other documents into. Click the icon next to the document that you wish to be your root document.

Checkboxes will populate in the Select Document column, allowing you to select the document(s) that you wish to merge with the root document.

Prepare Changes Select a Different Root Document Filter Documents

Select Document	Version	Title/ Category	Document Outcome	Approval Date	Expiration Date	File
<input checked="" type="checkbox"/>	1.1 11/15/2016	ACORP Diagram				 9.94 KB
<input checked="" type="checkbox"/>	1.2 11/15/2016	ACORP Diagram				 9.94 KB
Selected Root Document	1.0 11/23/2016	ACORP Diagram 2				 9.94 KB

Make your selection(s), and click **Prepare Changes**.

The following window will open. Here, you can see that the versions of the document you selected as your root document are already selected for you. The documents called "ACORP Diagram", which you selected with checkboxes in the previous step, are listed below the root versions with unchecked boxes next to them, which you can select if you decide to merge these documents into the root document.

Prepare Changes				
<input checked="" type="checkbox"/>	Document Title	Current Version	Proposed Version	Category
<input checked="" type="checkbox"/>	ACORP Diagram 2 <input checked="" type="checkbox"/>	1.0		ACORP Diagram <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	ACORP Diagram 2 <input type="text"/>	1.1	1. <input type="text" value="1"/>	ACORP Diagram <input type="text"/>
<input type="checkbox"/>	ACORP Diagram <input type="text"/>	1.1	1. <input type="text" value="2"/>	ACORP Diagram <input type="text"/>
<input type="checkbox"/>	ACORP Diagram <input type="text"/>	1.2	1. <input type="text" value="3"/>	ACORP Diagram <input type="text"/>

The columns in this window are as follows:

**Document Title** – When the window first opens, this field displays the original names of the documents. These are editable if you wish to change the name of any of your document versions.

**Current Version** – This column lists the current versions of the documents in the list.

**Proposed Version** – This column displays the suggested versions of the documents once they have been merged. These are editable if you wish to change any of the current version numbers.

**Category** – This column shows that all listed documents have been associated with the category of the root document.

In the scenario in the screenshot above, you can check the boxes next to the two documents titled ACORP Diagram to select them to merge with the versions of the root document. If you wish for these versions to have the same name as the root document, change their names in the Document Title field.

Prepare Changes				
<input checked="" type="checkbox"/>	Document Title	Current Version	Proposed Version	Category
<input checked="" type="checkbox"/>	ACORP Diagram 2	1.0		ACORP Diagram
<input checked="" type="checkbox"/>	ACORP Diagram 2	1.1	1. 1	ACORP Diagram
<input checked="" type="checkbox"/>	ACORP Diagram	1.1	1. 2	ACORP Diagram
<input checked="" type="checkbox"/>	ACORP Diagram	1.2	1. 3	ACORP Diagram

Merge Documents

Click **Merge Documents** to proceed.

This opens the Prepare Changes window, where you can view the proposed changes to the documents. Click **Confirm** to continue with the merge, or **Cancel** if you do not wish to proceed. A dialog will open; click **OK** to confirm the action or **Cancel** if you do not wish to reorganize the documents.