



IACUC ASSISTANT

IACUC Assistant Overview

Version 10.03.02

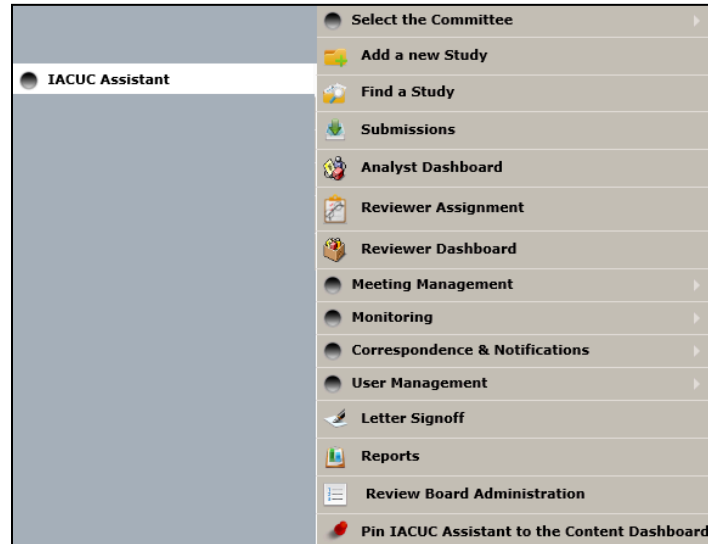
Contents

IACUC Assistant Overview.....	2
Find a Study.....	2
Submissions.....	7
Analyst Dashboard.....	8
Reviewer Assignment.....	8
Reviewer Dashboard.....	9
Meeting Management.....	9
Meeting Manager.....	9
Meeting Agenda.....	10
Meeting Minutes.....	10
Meeting Availability.....	11
Monitoring.....	12
Continuing Review Monitor.....	13
Outstanding Responses.....	13
Stipulations Tracking.....	15
Correspondence and Notifications.....	18
Correspondence.....	18
Drug/Device Email.....	22
Audit System Notifications.....	23
User Management.....	26
Grant User Access and Define Roles.....	26
User Training.....	28
User Vaccination History.....	31
Letter Signoff.....	35
Reports.....	39
Review Board Administration.....	40

IACUC Assistant Manual

IACUC Assistant Overview

The IACUC Assistant is available to streamline and assist in an institution's entire Review Board management. The IACUC Assistant works similarly to other review boards. The IACUC Assistant is used during the process of submission reviews, signoffs, member reviews, meetings and more.



Find a Study

The Find a Study item allows users to search the entire system for studies. Find a Study is a tool used by System Administrators and IACUC Coordinators, allowing them to search the system for certain studies. Depending on system settings, Find a Study within IACUC Assistant may or may not allow the search to expand across the entire system; it may be configured to search only for studies within the IACUC.

You are able to use the available filters to search for a study or you can click the **Find** button to return all studies in the system.

You can also change the display of the study numbering by selecting from the **Display Projects By** drop-down list. The numbers available here depend on what modules are configured in to your system. The example below shows the page when IACUC Number is selected from the drop-down list. The page reflects IACUC information, as opposed to the default, IRB Number information.

Some of the search fields are auto-populating fields. You begin by typing the name, and the system returns any resulting matches for you to select. **Sponsor, Principal Investigator, Department, and IACUC Number** are all auto-populating fields.

The **Principal Investigator** field allows you to flip between Active and Inactive PI's. Inactive PI's are any user accounts in the system that have been flagged as Inactive and are also listed as Principal Investigators on studies. Active PI's are any user accounts that are flagged as Active and also are listed as Principal Investigators on studies.

Also available are dropdown menus of available Study Statuses and Study Classifications that you can choose from.

The **Reference Number** field allows you to search for studies by Submission Reference Number. Enter a reference number for a specific submission form. When you filter the results, the study matching the reference number will populate in the results.

Note: You must enter the entire Reference Number in this field, except for the leading zeros. Example, a submission is Reference Number "000288" you would need to enter "000288" or "288" to filter the results correctly.

You can search by an expiration date range by entering in the appropriate information in the **IACUC Expiration Date** and **IACUC Full Renewal Expiration** fields.

The image shows two rows of search filters. The first row is labeled "IACUC Expiration Date:" and the second row is labeled "IACUC Full Renewal Expiration:". Each row contains a text input field, a calendar icon, a hyphen, another text input field, and a second calendar icon.

Reset Find Options – This button will allow you to reset the study filters and begin a new search.

For more advanced search options, click on the **Advanced Search Options** button.

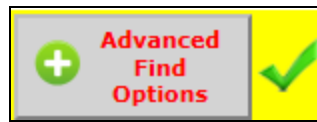
This allows you to filter by study drugs, devices, issue reports and key words in the Study Title. You can choose to use one or all options in the Advanced Search Options by selecting an item from a drop-down list and/or typing in the keywords. When you are finished, click **Apply**.

The screenshot shows a dialog box titled "Find A Study: Advanced Search Options". It has several sections:

- Key Study Personnel**: Includes an "Active" button, a "Select User Name:" text field, and a "Select User Role(s):" list with checkboxes for Principal Investigator, Study Author, Study Contact, Department Administrator, Administrative Assistant, Co-Investigator, and Research Nurse.
- Drugs associated to Study**: Includes three text fields for "Trade Name:", "Generic Name:", and "Investigational Name:".
- Devices associated to Study**: Includes a "Device Name:" text field.
- Issues Reported to the Board**: This section is currently empty.

 At the bottom right of the dialog are "Cancel" and "Apply" buttons.

When you click the **Find** button, the system will return any matching studies, depending on the filters you selected. If you added Advanced Search Options, the button will update with a yellow border to indicate extra filters are in use.



Once you find the study you are looking for, you can click the icon in the **Open** column to open the study record.

IACUC - Find a Study
Back

Find a Study Filters ?

Display Projects by: IACUC Number ▼	IACUC Number: <input type="text"/>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> + Advanced Find Options ✓ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✖ Reset Find Options </div> <div style="border: 1px solid #ccc; padding: 5px;"> 🔍 Find ... </div>
Study Nickname: <input type="text"/>	Study Status: All ▼	
Sponsor: <input type="text"/>	Study Classification: All ▼	
<input type="checkbox"/> Active Principal Investigator: <input type="text"/>	Reference Number: <input type="text"/>	
Department: <input type="text"/>	IACUC Expiration Date: <input type="text"/> 📅 - <input type="text"/> 📅	
	IACUC Full Renewal Expiration: <input type="text"/> 📅 - <input type="text"/> 📅	

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

Open	Study Status	IACUC Number	IACUC Expiration Date IACUC Full Renewal Expiration	Study Nickname Study Title	Principal Investigator	Sponsor
	Pending - Submitted for Initial Review	ANI-16-486		Application for Research Application for Research 2	Investigator, Susan	
	Pending - Submitted for Initial Review	ANI-16-489		Application for Research Application for Research	Investigator, Susan	

The other columns on this page are as follows:

Study Status - This displays the current status of the study (i.e. Open, Pending, Draft, Completed).

IACUC Number- If an IACUC Number has been associated with a study, it displays here. This column changes to whatever you choose to display the studies by, when you are using the “Display my Projects by:” filter.

IACUC Expiration Date- If an expiration date is associated with a study, it displays here. This column also changes with whatever you choose to display the projects by, when using the filters.

IACUC Full Renewal Expiration – If a Full Renewal Expiration date has been associated to the study, it displays here. This column will not display if you choose to display the projects by another type of number, using the filters.

Study Title- This displays the Study Title given to the study in the initial section of the Study Application.

Study Number- This displays the Study Number/Nickname given to the study in the initial section of the Study Application.

Principal Investigator- This displays the name of the Principal Investigator on the study.

Sponsor – This displays the name of the Sponsor on the study.

To view a study, click the icon in the **Open** column and you are brought to the **Study Management** page. By default, this page opens to the **Submissions** tab, which looks similar to the screen shot below.

IACUC Number: GH-14001-1
 PI: Investigator, Susan

Submissions

Study Status: **Open** IACUC Number: **GH-14001-1** Study Title: Swine Management and Production
 IACUC Expiration Date: 07/16/2015

Submissions Study Management

Protocol Items

- Study Application
- Other Study Documents

IACUC Items

- Personnel Amendment
- Annual Review
- Animal Incident Report
- Amendment

- Submissions History
- Study Correspondence

Track Location	Ref Number	Request Type	Process Submission
There are no outstanding submissions.			

The Submissions tab displays any forms available for viewing by the IACUC. These are typically items that have been submitted for review previously. You can also access the study's Other Study Documents, view Submission History, and view Study Correspondence from this tab.

From the **Submissions History Link**, you can track the workflow of the initial submission and any other submission forms processed by the review board (as seen in the screenshot below).

IACUC Number: GH-14001-1
 PI: Investigator, Susan

Review Board Submission History

Study Status: **Open** IACUC Number: **GH-14001-1** Study Title: Swine Management and Production
 IACUC Expiration Date: 07/16/2015

Submissions in Process Completed Submissions Submissions Returned with Changes

Reference Number	Track Location	Status	Request Type	Details	Review Board	View Outcome Letters	Review Process	Meeting Date	Review Outcome	Date Received
000030			Animal Incident Report		IACUC Committee 1		On Agenda	08/17/2015		08/03/2015 03:21:31 PM PDT

Clicking on the **Study Correspondence** link provides you with a list of all notifications, signature requests, and notices that pertain to the Study (see screenshot below).

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

Study Correspondence

Study Status: **Open** IACUC Number: **GH-14-006** Study Title: Mouse Study II
 IACUC Expiration Date: 08/24/2015 IACUC Full Renewal Expiration Date: 08/24/2017

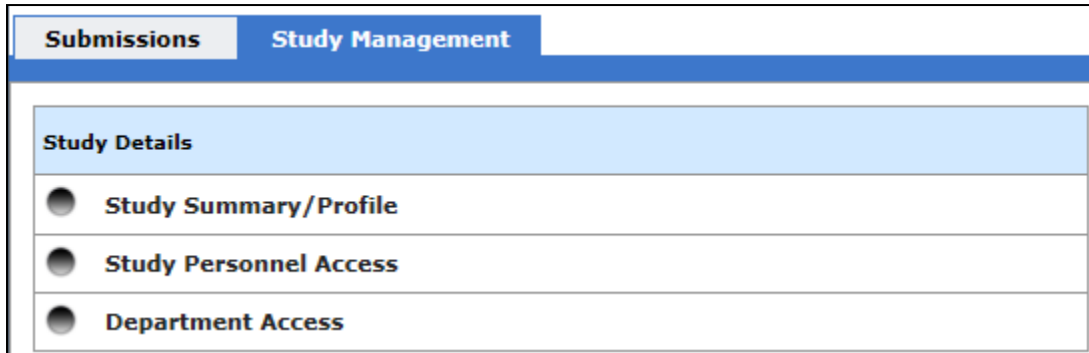
Add A New Correspondence Delete Selected Correspondence(s)

8 result(s) found...

View Message	Author	Subject
	Post a Reply to this Topic / Forward this Topic	
	Jan Coordinator	Posted: 08/05/2014 03:43 PM PDT (MII) IACUC Outcome Letter (attachment)
	Post a Reply to this Topic / Forward this Topic	
	Jan Coordinator	Posted: 08/05/2014 03:28 PM PDT

If there are any outstanding submissions that are awaiting approval or signoff, they appear in the **Outstanding Submission(s)**. Here you can see the location of the submission within the workflow, you can edit/view the submission, or you can **Retract Submission**.

Clicking on the **Study Management** tab brings you to a screen where you can access all information regarding the Study.



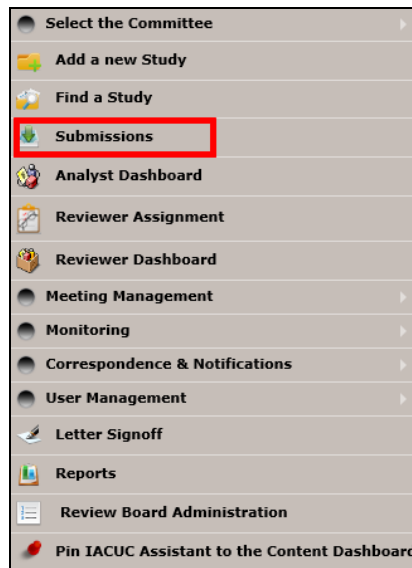
By selecting the icons under one of the main headings (e.g. **Study Details, Sponsors & Subrecipients**, you are linked to various information that is complete for this particular Study.

The Study Summary/Profile link contains basic information about the study such as personnel, review board information, study details, etc. The screenshot below should look similar to your Study Summary screen, but might contain extra fields about the study. Certain fields may or may not be in use and are turned on or off in the System Configuration Properties.

Study Number: MII		Study Summary		Back	
PI: Investigator, Susan M., Ph.D.					
Study Status: Open	IACUC Number: GH-14-006	Study Title: Mouse Study II			
	IACUC Expiration Date: 08/24/2015	IACUC Full Renewal Expiration Date: 08/24/2017		Save Changes	
Study Summary Basic Information					
Study Title:	Mouse Study II				
Status:	Open				
Study Number:	MII				
Animal Research:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Study Classification:	--none--		
Federally Funded:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Study Personnel					
Principal Investigator:					

Submissions

The **Submissions** menu item allows you to view all submissions sent to the IACUC, as well as process those submissions. Your instance of iRIS may display either **Submissions** or **Committee Submissions** in the IACUC Assistant list, depending on how your system is set up (Review Board property "rb.use_submission_by_committee". See the IACUC Assistant – Properties manual for more information).



When you click on the Submissions or Committee Submissions link, a page opens displaying all submissions, divided into four tabs: **Not Assigned**, **Assigned**, **Completed**, and **Agendas**. Upon opening the Submissions link, the system automatically defaults to the **Not Assigned** tab. Information regarding each submission populates in sortable columns so you can easily view as well as search for pertinent information pertaining to individual submissions. See the IACUC Assistant - Submission Processing manual for more information.

IACUC - Submission Back									
Not Assigned		Assigned	Completed	Agendas	Print Friendly		Display Submissions by: IACUC Number		
1 result(s) found... 1 - 1									
Open	IACUC Number	Ref Number	Type	Date Board Received	IACUC Expiration Date	Full Renewal Expiration	Principal Investigator	Assigned Analyst	
	GH-14-015	000215	Initial Review Submission Form	07/02/2014 03:24:51 PM PDT			Investigator, Susan M., Ph.D.	Coordinator, Dan	


Analyst Dashboard


The **Analyst Dashboard** allows you to search for and access studies in the system. Within the Analyst Dashboard you can view your specific analyst assignments and open the associated submissions, which will allow you to access study-related information, determine a review process, assign reviewers, add stipulations, designate a submission outcome and approval dates, generate outcome letters, access upcoming meeting dates, and more. You can also view the agendas for upcoming and past meeting dates.

See the IACUC Assistant - Analyst Dashboard manual for more information.


Reviewer Assignment

The **Reviewer Assignment** area of IACUC Assistant allows you to view and open your current Incomplete and Complete reviewer assignments. By default, the Reviewer Assignment screen opens to the Incomplete tab.

IACUC - Assigned Submissions for Review Back									
Incomplete		Complete		Print Friendly		Display Submissions by: IACUC Number			
Click to open	IACUC Number	Ref Number	Type	Review Process	Date Board Received	Expiration Date	Principal Investigator	Assigned Reviewers	Assigned Analyst
	ANI-16-493	005011	iMedRIS Initial Review Submission Form	Process Administratively	11/09/2016 11:59:06 AM PST		Investigator, Susan	Primary Ron User	Analyst, Ann

By clicking the  icon in the “Click to open” column, you will be directed to your reviewer assignment. You can choose to display submissions by IACUC Number or by another type of study numbering using the “Display Submissions by:” dropdown menu.

On the Complete tab, you can enter a number in the “Reviews Completed within the last:” text box. This will determine how far back your completed review assignments will be displayed. Opening an assignment will take you to your completed form.










IACUC - Assigned Submissions for Review Back									
Incomplete		Complete		Print Friendly		Display Submissions by: IACUC Number			
Reviews Completed within the last :					14	days	Refresh		
Click to open	Letters	IACUC Number	Ref Number	Type	Principal Investigator	Department Study Nickname	Reviewers	Date Board Received	
		ANI-16-493	005011	iMedRIS Initial Review Submission Form	Investigator, Susan	Healthcare System - Sample Site Application for Animal Research	Primary Ron User	11/09/2016 11:59:06 AM PST	

Reviewer Dashboard

Reviewer Dashboard allows you to access any submission you have been assigned to review, access internal submission routing assignments, and review any upcoming meetings.

See the IACUC Assistant – Reviewer Dashboard Manual for more information.

Meeting Management

 Meeting Management	 Meeting Manager
 Monitoring	 Meeting Agenda
 Correspondence & Notifications	 Meeting Minutes
 User Management	 Meeting Availability
 Letter Signoff	

Meeting Manager

Meeting Manager allows you to view meeting agendas, set meeting availability, and set items to be reviewed at the meeting. Access to this menu item is controlled through the Role Access Matrix in Review Board Administration. The Meeting Manager is typically reserved for a review board administrator. You can view current agendas and publish/create

Word document versions of Agendas and Meeting Minutes to send to board members. The Agenda and Meeting Minutes templates are created in Review Board Configuration. For more information on creating Agenda and Minutes templates, see the IACUC Assistant – RB Administration Manual.

IACUC - Meeting Manager							Back
Meetings from <input type="text"/> to <input type="text"/>		Refresh	Show all meetings		Meeting Schedule		Meeting Availability
16 result(s) found...							1 - 15
Meeting Date	Agenda State	Notify Reviewers	Date Minutes Sent for Comments	Date Minutes Approved by Committee	Availability	Edit/View Reviews & Minutes	
Committee 01 meeting held on 07/23/2015	Draft	Disabled				Submissions Review	
Committee 01 meeting held on 06/25/2015	Draft	Disabled				Submissions Review	
Committee 01 meeting held on 05/28/2015	Draft	Disabled				Submissions Review	
Committee 01 meeting held on 04/23/2015	Draft	Disabled				Submissions Review	

See IACUC Assistant - Meetings Manual for more information on how to manage meetings within Meeting Manager.

Meeting Agenda

Meeting Agenda allows you to view information related to a specific meeting date. You can access past and future meetings from this area. If you have a review board administrator role, come to this area to prepare for an upcoming meeting. If your role does not have this administrative privilege, come to this area to look at submissions placed on a particular meeting date. Read/write access for the meeting agenda is configured in Setup Role Access in Review Board Administration.

IACUC - Review Board Meeting Agenda		Back				
Agenda State: Revision 2						
Reviewer Notifications: Enabled						
Items to be Reviewed at Committee 01						
Meeting : ◀ 08/25/2014		Submission Review validation				
		Save Changes				
<ul style="list-style-type: none"> Meeting Attendance Call to Order Old Business New Business Miscellaneous Closing Comments Meeting Motions Review Documents 	<table border="1"> <thead> <tr> <th>View File</th> <th>Title</th> </tr> </thead> <tbody> <tr> <td colspan="2">No documents have been associated with this agenda</td> </tr> </tbody> </table>	View File	Title	No documents have been associated with this agenda		
View File	Title					
No documents have been associated with this agenda						
Meeting Start Time: <input type="text"/> <input type="text"/> AM	Meeting End Time: <input type="text"/> <input type="text"/> AM	Meeting Chair: --none--				
New Protocols - 1 Submissions						

The meeting agenda page will open to the next upcoming meeting. Flip to a different meeting date by clicking on the arrows by the meeting date at the top of the page. See the IACUC Assistant - Meetings manual for more information.

Meeting Minutes

Meeting Minutes allows you to access published meeting minutes for any past meeting. This is an area where board members go to pull minutes from a past meeting.

This page displays a link for each board meeting that has been held from newest to oldest. If minutes have been generated and a Finalized version has been published, a **View Finalized Minutes** button populates next to the meeting link. If a Draft version of the minutes has been published, the button reads **View Draft Minutes**. If the meeting minutes have not been published yet, no button displays. You can click on the **View Finalized Minutes** or **View Draft Minutes** button to view the PDF document for that meeting. You can also open to the meeting agenda by clicking the link reading the meeting name and meeting date.

IACUC - Meeting Minutes Archive		Back
IACUC list of meeting minutes		
4 result(s) found...		
Committee 01 meeting held on 07/25/2014	View Draft Minutes	
Committee 01 meeting held on 07/24/2014	View Finalized Minutes	
Committee 01 meeting held on 06/26/2014	View Finalized Minutes	
Committee 01 meeting held on 06/25/2014	View Finalized Minutes	

When you click to view the draft or finalized minutes, they open in a new screen displaying the information entered from the meeting. The fields in the minute’s document reflect what was defined in the Meeting Minutes Template. If it is a Draft version of the minutes, a watermark appears with the word **DRAFT** across the minutes. See IACUC Assistant - Meetings Manual for more information.

Meeting Availability

The **Meeting Availability** tool allows a user to indicate their availability for any future board meetings.

Meeting Availability				Back
				Save the availability
Committee 01 Committee Meeting:		◀ 08/25/2014 ▶		
Members Name	Will be Present	Will Not be Present	Available for Review	
Member, Frank	<input type="radio"/>	<input type="radio"/> No Response indicates presence at this meeting	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Member, George	<input type="radio"/>	<input type="radio"/> No Response indicates presence at this meeting	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Member, Joe	<input type="radio"/>	<input type="radio"/> No Response indicates presence at this meeting	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Member, Nancy	<input type="radio"/>	<input type="radio"/> No Response indicates presence at this meeting	<input checked="" type="radio"/> Yes <input type="radio"/> No	

If you log in to Meeting Availability as a system administrator, each meeting date appears on a single page. Each member of the board displays on the page with three columns to the right of their name. You can set a member’s availability for a certain meeting date by marking a response in the three columns.

Will be Present – Select this if the member will be at the meeting.

Will Not be Present – Select this if the member will not be attending the meeting. If this selection is flagged, the user’s name will flag in Member Attendance on the Meeting Agenda page that they may not be present.

Available for Review – If a member has indicated that they will not be available for reviewer assignments, set this from “Yes” to “No”. When a member indicates they are unavailable for review, their name will be removed from the Reviewer Assignments area for any submission associated to this meeting date.

If you log in a non-review board administrative role, when you view this page, you will only be allowed to set your availability for upcoming meetings.

Meeting Availability Back				
Save the availability				
List of meetings found				
Availability	Will be Present	Will Not be Present	Available for Review	View Calendar
Committee 01 August 25, 2014	<input type="radio"/> No Response indicates your presence at this meeting	<input type="radio"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Committee 01 September 25, 2014	<input type="radio"/> No Response indicates your presence at this meeting	<input type="radio"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Committee 01 October 23, 2014	<input type="radio"/> No Response indicates your presence at this meeting	<input type="radio"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	

Each meeting is listed with the same options – Will be Present, Will Not be Present, and Available for Review. Another column, View Calendar, is also available.

close
print

May 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			01	02	03	
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01 (Week 23)	02	03	04	05	06	07
08 (Week 24)	09	10	11	12	13	14
15 (Week 25)	16	17	18	19	20	21
22 (Week 26)	23	24	25	26	27	28
29 (Week 27)	30					

July 2014







Sun	Mon	Tue	Wed	Thu	Fri	Sat
			01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01 (Week 23)	02	03	04	05	06	07
08 (Week 24)	09	10	11	12	13	14
15 (Week 25)	16	17	18	19	20	21
22 (Week 26)	23	24	25	26	27	28
29 (Week 27)	30					

Clicking this icon opens a new window with a calendar view displaying the month of the meeting. Click the **Close** button when you are finished viewing the calendar.

After setting your availability for a meeting date, be sure to click the **Save the Availability** button.

Monitoring

 Monitoring	 Continuing Review Monitor
 Correspondence & Notifications	 Outstanding Responses
 User Management	 Stipulations Tracking




Continuing Review Monitor

Continuing Review Monitor allows you to access the study management page of the submissions that are up for continuing review and full renewal expiration. Submissions that are within 120 days of their continuing review date populate in this list.

Display the list by the IACUC number, IRB Number, or IBC Number (depending on which modules are setup in your instance of iRIS) by selecting the desired option from the **Display By:** drop down list. The **Study Title/Study Number**, **IACUC Number** (or other selected number from **Display By**), **IACUC Initial Approval**, **IACUC Expiration**, **Full Renewal Expiration**, **Principal Investigator**, and whether the **Submission Posted** displays for each study in the list.

This list allows your IACUC team to monitor any studies coming up for Full Renewal, as well as take action on any study that missed the Full Renewal deadline. A study record displays in this list until the study record is updated by either closing it for lack of a Continuing Review or Full Renewal submission or updating the IACUC Expiration date to a later date.

Clicking the **Open** icon next to any submission brings you to the Study Management Page.

Continuing Review Monitor Back							
 Print Friendly Display by: IACUC Number							
2 result(s) found...							
Open	Study Title/Study Number	IACUC Number	IACUC Initial Approval	IACUC Expiration	Full Renewal Expiration	Principal Investigator	Submission Posted
	Swine Management and Production	GH-14001	12/02/2014	09/10/2014	09/10/2014	Investigator, Susan M., Ph.D.	Yes
	Swine Management and Production Phase VIX	GH-14-005	09/30/2007	09/30/2014	09/30/2014	Investigator, Susan M., Ph.D.	No

From here you can access the Study Profile, which allows you to make any necessary changes to the study record.

Study Number: Swine Management and Production
PI: Investigator, Susan M., Ph.D.
Submissions
Back

Study Status: Open

IACUC Number : GH-14-005

Study Title : Swine Management and Production Phase VIX

IACUC Expiration Date: 09/30/2014

IACUC Full Renewal Expiration Date: 09/30/2014

Submissions **Study Management**

Protocol Items

- Study Application
- Other Study Documents

Submission Items

- Initial Submission
- Initial Review Submission Form

- Submissions History
- Study Correspondence

Track Location	Ref Number	Request Type	Process Submission
There are no outstanding submissions.			

Outstanding Responses

Outstanding Responses allows you to manage submissions that have been sent back to the PI for corrections.

The **Outstanding Responses** menu group provides a way for the Coordinator to manage submissions that were sent back to the KSP for changes. The determination of a submission status is set in the Outcome tab (see box below). Here the status of the Review Outcome, along with a “Yes/No” for **Additional Information Required**, is set. If a submission has an outcome with **Additional Information required** set to “Yes,” then this submission remains in **Outstanding Responses** until a new version of the submission is received.

Review Outcome: Approved Pending ▼

Additional information required: **Yes**


The submissions in the list can be displayed by their IACUC Number or other type of study number (depending on which modules are setup in your instance of iRIS). Other Outstanding Response Filters can be used at the top of the screen to narrow down your results. You can search by Form, which will list all of the submission, submission correction, and submission response forms in your iRIS system. You can also search by the Analyst or Reviewer assigned to the submission, as well as submission outcomes.

There are also date range fields that you can use to search for submissions based on the Follow-Up Due date and the Date Sent. Enter a beginning and end date to search for submissions that fall within a particular date range. After you have set your desired filters, click the **Find** button. To start your search over, click **Reset Find Options**.

IACUC - Response Due
Back

Outstanding Response Filters

Display Response by: IACUC Number ▼	Outcome: All ▼	
Principal Investigator : <input type="text"/>	Follow-up Due Begin: <input type="text"/> <input type="button" value="⊞"/>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Print Friendly</div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">Reset Find Options</div> <div style="border: 1px solid black; padding: 5px;">Find ...</div>
IACUC Number: <input type="text"/>	Follow-up Due End: <input type="text"/> <input type="button" value="⊞"/>	
Form: All ▼	Reviewer: <input type="text"/>	
Analyst: <input type="text"/>	Date Sent Begin: <input type="text"/> <input type="button" value="⊞"/>	
	Date Sent End: <input type="text"/> <input type="button" value="⊞"/>	


Click on the  icon to access the original submission; this icon will take you right to the Outcome tab of the submission. From here, you can track the location of the submission, status the submission, or send correspondence to the KSP.

IACUC - Response Due Back

Outstanding Response Filters


Display Response by: <input type="text" value="IACUC Number"/>	Outcome: <input type="text" value="All"/>	<input type="button" value="Print Friendly"/> <input type="button" value="Reset Find Options"/> <input type="button" value="Find ..."/>
Principal Investigator: <input type="text"/>	Follow-up Due Begin: <input type="text"/>	
IACUC Number: <input type="text"/>	Follow-up Due End: <input type="text"/>	
Form: <input type="text" value="All"/>	Reviewer: <input type="text"/>	
Analyst: <input type="text"/>	Date Sent Begin: <input type="text"/>	
	Date Sent End: <input type="text"/>	

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

Letters	Outcome	IACUC Number	Ref Num	Type	Date Sent	Follow-up Due	Principal Investigator	Department Study Nickname	Analyst Assigned	Reviewer(s)	Meeting Date
	Modifications Required to Secure Approval	ANI-12-089	272	Submission Response for Initial Review Submission Form	10/09/2012	10/09/2012	Administrator	Research Testing for protocols			

The following columns populate for the submissions:

Letters - If an outcome letter was created and sent, an icon appears in this column. Hover the mouse over the icon and the type of letters will appear (see below).

Letters	Outcome	IACUC Number	Ref Num	Type
	Approved Pending	GH-14001-1	222	IACUC Annual Review of
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> [Letter 1] Approved Pending Changes - (sent) </div>				

Outcome - The review outcome/ status of the submission.

IACUC Number - The review board number used to reference the study.

Ref Number - The iRIS-generated reference number for the submission.

Type – The type of submission form.

Follow-up Due - The follow-up date associated to the submission, if any.

Principal Investigator - The Principal Investigator assigned to the study.

Department / Study Number – The Primary Department and Study Number associated to the study populates in this column.

Analyst Assigned – The analyst, if any, assigned to the submission.

Reviewer(s) - The reviewer(s), if any, that were assigned to the submission.

Meeting Date - If the submission was put on the agenda, the meeting date displays here.

Stipulations Tracking

Stipulations Tracking allows you to track and edit the stipulations for each submission.

When clicking on the Stipulations Tracking icon in the menu, you will be brought to a screen similar to the one below.

Open	Edit	IACUC Number	Ref Num	Type	Principal Investigator	Stipulation Type	Follow-up Due	Response Acknowledge
		GH-14001-1	000228	IACUC Amendment Submission Form	Investigator, Susan M., Ph.D.	Stipulation must be addressed		
		Stipulation: stip Response:						
		GH-14-012	000240	Initial Review	Investigator, Susan M.,	Stipulation must be		

The stipulations display by **Open Stipulations** and **Closed Stipulations** tabs. You can filter the stipulations using the options at the top of the screen in either tab. You have the ability to filter by the Review Board Number (which depends on the selection made from the **Display by** dropdown), Reference Number, Follow-up Date Range, and Stipulation Type. Display the stipulations by one of the following: IACUC Number, Proposal Number, or IBC Number (or other review board numbers depending on the configuration of the dropdown list).

The columns in the Open Stipulations tab display as follows:

IACUC/IRB/IBC Number – The review board number assigned to this study displays in this column.

Ref Num – The submission’s reference number displays in this column.

Type – This column displays the type of submission form in which this stipulation was entered.

Principal Investigator – The Principal Investigator associated with this study displays here.

Stipulation Type – The type of stipulation displays here.

Follow-up Due – If the stipulation type is “Comments that must be addressed”, then this area populates with the date that the follow-up is due.

Response Acknowledge – This area displays whether or not the PI accepted the stipulation.

The actual **Stipulation** entered by the Review Board and the **Response** from the study side displays in the green highlighted area. Note: Study Management will NOT be able to create a **Response** to the stipulations if the submission has not been returned to the study by the review board.

Select the **Open** icon next to the appropriate stipulation to open the submissions screen (shown below).

Study Number: Swine Management and Production
 PI: Investigator, Susan M., Ph.D.

IACUC - IACUC Amendment Submission Form

Back

Protocol Items	Miscellaneous	IACUC Items	Submission Forms
Ref Number: 000228	IACUC Number: GH-14001	Study Title: Swine Management and Production	
Study Status: Open	IACUC Expiration Date: 09/10/2014		
	IACUC Full Renewal Date: 09/10/2014		

General Information

- Submission Components
- Correspondence
- Submission History
- Pre-review Screening
- Review Checklist

General Information ⓘ

Study Number: Swine Management and Production

[Edit the Master Lay Summary](#)

[Click Here to edit the submission summary](#)

Selecting the **Edit** icon opens the Process Stipulation screen (shown below). From this area you can choose a **Review Board Action** and provide a date that the stipulation was closed in the **Review Board Date Closed** field.

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

Process Stipulation

Back

Study Status: Pending - Submitted for
 IACUC Number: **GH-14-006** Study Title: Mouse Study II

+ Add Memo
Save Stipulation

Review Board Action:	Accepted
Review Board Date Closed:	07/16/2014
Stipulation Type:	Stipulation must be addressed
Follow-up Due:	
Stipulation:	Revise app
Response Acknowledge:	Yes
Response Statement:	

Edit	Name	Date Modified	Memo Details
No Memos have been added			

You can also add memos to the stipulation. Click the **Add Memo** button. A new page opens, allowing you to enter the text for the memo. Click the **OK** button when you are done.

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

IACUC - Stipulation Memo

Back

OK

Stipulation Memo

Normal (...) Font Size

Memo text.

The memo adds to the Stipulation record. Memos allow you to keep a log of comments from different review board users with information specific to the Stipulation. When you are finished setting information on this page, click the **Save Stipulation** button to return to the Stipulations Tracking page. If you entered a Review Board Action and a Review Board Date Closed, the Stipulation moves from the Open Stipulations to the Closed Stipulations tab.

+ Add Memo
✖ Delete Memo
Save Stipulation

Review Board Action:	Accepted
Review Board Date Closed:	07/16/2014
Stipulation Type:	Stipulation must be addressed
Follow-up Due:	
Stipulation:	Revise app
Response Acknowledge:	Yes
Response Statement:	

Edit	Name	Date Modified	Memo Details
	Administrator	07/23/2014	Memo text.

Select the Closed Stipulations tab. A screen similar to the Open Stipulations tab displays, listing all of the stipulations that have been closed (see below).

IACUC - Stipulations Tracking ← Back

Display by:	IACUC Number	IACUC Number:	<input type="text"/>
Reference Number:	<input type="text"/>	Follow-up Date:	<input type="text"/> - <input type="text"/>
Stipulation Type:	--none--	Date Closed:	<input type="text"/> - <input type="text"/>

3 result(s) found...

Open	Edit	IACUC Number	Ref Num	Type	Principal Investigator	Stipulation Type	Follow-up Due	Response Acknowledge	Action	Date Closed
		GH-14-006	000233	Initial Review Submission Form	Investigator, Susan M., Ph.D.	Stipulation must be addressed		Yes	Not Met	07/23/2014
Stipulation: Revise app Response:										
		GH-14-006	000233	Initial Review Submission Form	Investigator, Susan M., Ph.D.	Stipulation must be addressed		Yes	Accepted	07/23/2014

Two additional columns appear in the Closed Stipulations tab – **Action** and **Date Closed**. The information in these columns populated with the selections made in the Process Stipulation screen as explained above. The submissions corresponding to the stipulation can be opened or edited here as well, as previously explained.

Correspondence and Notifications



Correspondence

The **Correspondence** tool allows you to view all IACUC correspondence that has been sent out through the system as well as add and reply to correspondence.

The Correspondence menu group is typically available only to Review Board Coordinators and Administrators. However, read/write access can be granted to any role on the board through Review Board Administration – Setup Role Access.

Clicking the Correspondence icon brings you to the following screen. Any correspondence generated through the IACUC Assistant module or sent to the IACUC Assistant module creates a log within this screen.

View Message – Click on this icon next to the correspondence you want to view. The correspondence displays in read-only format. The subject title, **IACUC Number**, the recipients of the correspondence, additional recipient(s) and attachments that might be included with the correspondence also display here.

To reply to a correspondence, select the **Post a Reply to this Topic** link above the correspondence. A new page displays (see below).

Send Email – When checked, this correspondence is sent to the recipients via email as well as posting to the Correspondence area under My Assistant. If your reply should not be sent as an email, deselect the checkbox.

Subject – This displays in the subject field of the correspondence. This is modifiable. However, since this is a reply, it defaults to the original correspondence's subject.

IACUC Number – If this correspondence is associated to a study, the IACUC Number of that study displays here.

Recipient(s) – The recipient(s) of the correspondence displays here. This is pre-populated with prior recipient(s) and/or author of the original correspondence EXCEPT if the recipient/author is the current user. This field is required and can be configured by selecting the heading link. A new page displays (see below).

Correspondence contact			
Contacts	Role	<input type="checkbox"/>	
<u>Study Personnel</u>			
	Principal Investigator	<input checked="" type="checkbox"/>	Investigator, Susan M., Ph.D.
	Co-Investigator	<input type="checkbox"/>	Investigator, Patrick, Ph.D
	Study Coordinator	<input type="checkbox"/>	Coordinator, Mary Jane, R.N.

If the correspondence was associated to a study, the Key Study Personnel are listed. User roles are listed with a checkbox next to each. To add personnel to the recipient's list, select the checkbox next to the appropriate user. You may select or unselect all by clicking on the **Select All** icon above the checkboxes. After the appropriate user(s) have been selected, click on the **Save Changes** button.

Additional Recipient(s) – Select this link to send this correspondence to person(s) outside of iRIS. A new page displays when this link is selected. (See below.)

Correspondence Additional Contacts	
Name	E-mail Address
No Additional Recipients have been added.	

Select the **Add A New Contact** button. A new row will appear, allowing you to add the contact information. (See screenshot below.)

Correspondence Additional Contacts	
Name	E-mail Address
<input type="checkbox"/>	<input type="text"/>

The **Name** and **E-mail Address** fields are both required. Note: The E-mail address must be entered in the name@domain.com format or an error message will display.

You may add more contacts by repeating the steps above. Delete a contact by selecting the checkbox next to the appropriate contact(s) and clicking the **Remove Selected Contacts** button.

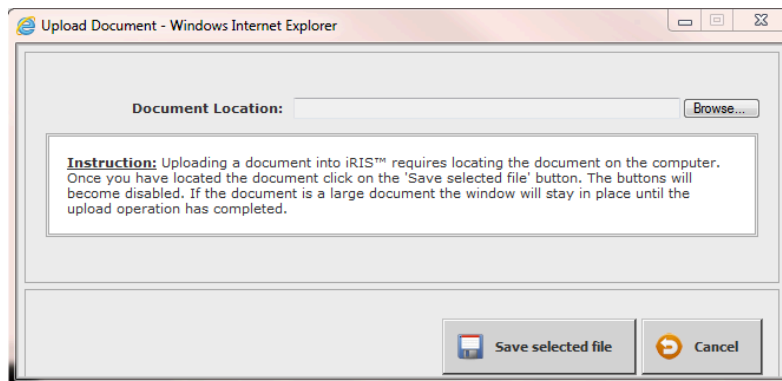
After the appropriate contacts have been entered, select the **Save and Return** button. Note: If this button is not selected, any changes made will not be saved.

Reply To(s) - This list is the group of users that will be placed in the recipients list when a reply is posted to this correspondence, either from iRIS or from an inbox.

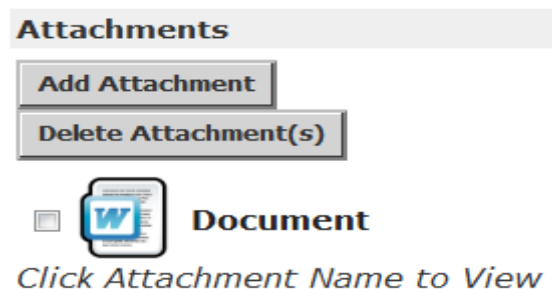
Additional Reply To(s) - This is the group of users that will be placed in the additional recipients list when a reply is posted to this correspondence, either from iRIS or from an inbox.

Attachments – Select the **Add Attachments** button to add any documents to the correspondence. A new page displays allowing you to upload the document.

A **Title** must be entered for the attachment. Select the **Upload** button to upload the document. The upload dialog box displays. (See below.)



Select the **Browse** button to look for the document to be uploaded on your computer. Select the **OK** button after the document is located or select the **Cancel** button to cancel the upload. After the appropriate document is uploaded, select the **Save and Return** button. This section appears as displayed in the screenshot below.



Select the attachment name or icon to view the attachment. To delete an attachment, select the checkbox next to the appropriate attachment(s) then select the **Delete Attachment** button. You may add more attachments by selecting the **Add Attachment** button again. Note: Though there is no limit on the size of the documents uploaded, certain email

systems will have a limit on the size of incoming mail; therefore it is advisable that the uploaded documents do not exceed a total of 1 MB when sending the correspondence as email.

Content – Enter the content of the correspondence here.

Select the **Save and Send Correspondence** button when you are finished entering the necessary information, or click **Save Correspondence as a Draft** to save your message to send later. The correspondence appears directly above the original correspondence.

Forward a correspondence record by clicking the **Forward this Topic** link, located next to the **Post a Reply to this Topic** link.



When you forward a correspondence, a page similar to the one shown below opens. The Content of the correspondence pulls in the original correspondence Content, allowing you to add to the Content before sending. The fields provided in this area are the same as described above. Before you forward the correspondence, you need to select a Recipient.

Submission Correspondence ◀ Back

Save & Send Correspondence

***Send Email**

***Subject**
Review Response

Swine Management and Production

*** Recipient(s):**
Dr. Susan M. Investigator, Ph.D.

Additional Recipient(s):

Reply To(s):

Additional Reply To(s):

Attachments

No Attachments have been added to this message

Template: --none--

***Content**

>>Administrator wrote:

Pre-Review Corrections Notification

Study Title: "Swine Management and Production"
IACUC Number: GH-14001-1

To add a new correspondence, select the **Add a New Correspondence** button. This displays a page similar to the **Post a Reply** page, except there is no pre-populated data.

Except for correspondence that is sent out as email, the correspondence may be deleted only when they are first created and saved as a draft. You will NOT be able to delete correspondence that has been sent out as an email at any time. A checkbox will appear next to the correspondence indicating that it may be deleted. Select the checkbox and click on the **Delete Selected Correspondence** button.

Drug/Device Email

The **Drug/Device Email** tool allows you to send a study-related drug or device email to the contacts of that study. To begin, click on the Drug/Device Email link in your IACUC Assistant. Access to this menu item is controlled for certain roles through the Review Board Administration - Role Access Matrix.

Note: This tool is typically used for pharmaceutical recalls, or notes that need to go out to all Study Contacts who are utilizing a specific drug or device.

A user can search for the drug/device from one of the four drop down menus: **Select a Drug by Trade name**, **Select a Drug by Generic name**, **Select a Drug by Investigation name**, or **Select a Device**. Once you have made your selection from the dropdown menu, all studies associated with your selection populate with a checkbox next to each one. Click the checkbox next to the study you wish to send an email regarding. Enter in a **Subject** and any necessary content. When you have finished, click the **Send Email** button in the upper right hand corner.

This triggers the email and all study contacts on the selected studies will receive the drug/device related email.

Audit System Notifications

The **Audit System Notifications** tool allows you to search through and view system notifications.

The Audit System Notifications menu item is usually accessible to Review Board Coordinators and Administrators. However, its accessibility is controlled for all roles through the Setup Role Access matrix found in Review Board Administration.

Every notification that is sent out by the iRIS system is logged and can be tracked. Since the system automatically generates the notifications, this notification audit tool is very useful for Coordinators who need to check on notifications for other members of their review board or study personnel. All system notifications can be audited here to ensure that they are sent.

Clicking on this icon opens the following Audit Notifications screen with several filters to pull up the notifications you want to see:

System Administration - Audit Notifications Back

Filter By:	Notification Type: --none--	Recipient(s): <input type="button" value="Select User"/> <input type="button" value="Clear User"/>	
	Date Range: From <input type="text"/> To <input type="text"/>		
	Display Projects by: IACUC Number	Subject: <input type="text"/>	
	IACUC Number: <input type="text"/>	Content: <input type="text"/>	

0 result(s) found... 1 - 0

View	Notification Type	IACUC Number	Date Posted	Subject	Recipient(s)	Additional Recipient(s)
------	-------------------	--------------	-------------	---------	--------------	-------------------------

Notifications are displayed with fifty items per page. Selections are made using the following filter tools:

Notification Type – Select a notification type from the dropdown list to filter by **Notification Type**.

Dropdown menu for Notification Type:

- none--
- Account Created
- Account Locked
- Account Created Pending Acceptance
- Additional Signoff
- Annual Failure To Submit
- Attendance Change
- Auto Expire Study
- Clinical Trial Patient Encounter
- Continuing Review Due
- Covered Person Commitment Change
- Covered Person Commitment Change Deadline
- Covered Person Commitment Change Reminder
- Department Review Exceeded
- Department Signoff
- Reminder Notification for Review and Signoff
- Designated Member Assignment
- Designated Reviewer Assignment
- Designated Review Agenda Assignment
- Admin Reviewer Assignment

Recipient(s) – Use this field if you wish to perform an audit for a specific user in the system that would have received the notification for which you are searching. Only user(s) with entered criteria that have received notifications display.


Search User Directory Back

 Directory Browse/Find:	Last Name: <input type="text"/> (You may enter a partial name to search)	<input type="button" value="Find"/>
	First Name: <input type="text"/>	
	by Department: All Departments	

When the **Select User** button is clicked, a new screen displays (see below). Enter the search criteria, and click the **Find** button. Use the “%” to perform a “wildcard” search.

Search User Directory Back

Save Selected User(s)





Directory
Browse/Find:

Last Name: (You may enter a partial name to search)

First Name:

by Department:

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Administrator	Department (primary)	admin@imedris.com

When you have found your selection, click the Select User icon  next to his/her name. Once added to the search filter, you can clear a name by selecting the **Clear User** button. This tool only allows for reporting of one user at a time; if you happen to select more than one user on a page, only the topmost user is selected and inserted into the search tool.

System Administration - Audit Notifications Back

Filter By:

Notification Type:

Date Range: From To

Display Projects by:




IACUC Number:

Recipient(s):

Subject:

Content:

19 result(s) found... 1 - 19

View	Notification Type	IACUC Number	Date Posted	Subject	Recipient(s)	Additional Recipient(s)
		GH-14-008	08/04/2014 03:24 PM PDT	Submission Administratviely Processed	Administrator	
		GH-14-007	08/04/2014 03:22 PM PDT	Submission Administratviely Processed	Administrator	
	Pre-review Agenda Assignment	GH-14-007	07/25/2014 10:04 AM PDT	Submission Placed on Meeting for Full Board Review	Administrator	

Select additional filtering from the other fields on the page.

Date Range – If the approximate date of a notification were known, then this would be the best filter.

IACUC/IRB/IBC Number – This depends on the selection made from the **Display Projects by** dropdown list.

Subject – Enter a key word or phrase that appears in the subject. Use the “%” to do a “wildcard” search.

Content – Enter a key word or phrase that would appear within the content of the notification. Use the “%” to perform a “wildcard” search.

Provide information for one or all of the search fields to locate the necessary notification, or click **Search** with no filters entered to return all IACUC notifications in the system. After clicking the **Search** button, all of the results display in the table under the search engine, with the most recent notification being at the top of the page. You can further sort the notifications displayed in ascending or descending order by clicking in the column headings (as shown below). This feature is not included in the **View** and **Recipient(s)** columns.

System Administration - Audit Notifications ◀ Back

Filter By:	Notification Type: --none--	Recipient(s): <input type="button" value="Select User"/> <input type="button" value="Clear User"/>
	Date Range: From <input type="text"/> To <input type="text"/>	<input type="text" value="Administrator"/>
	Display Projects by: IACUC Number	Subject: <input type="text"/>
	IACUC Number: <input type="text"/>	Content: <input type="text"/>

19 result(s) found...

1 - 19

View	Notification Type	IACUC Number	Date Posted	Subject	Recipient(s)	Additional Recipient(s)
		GH-14-008	08/04/2014 03:24 PM PDT	Submission Administratviely Processed	Administrator	
		GH-14-007	08/04/2014 03:22 PM PDT	Submission Administratviely Processed	Administrator	
	Pre-review Agenda Assiignment	GH-14-007	07/25/2014 10:04 AM PDT	Submission Placed on Meeting for Full Board Review	Administrator	

The following columns populate for your search results: **View**, **Notification Type**, **IACUC Number** (or IBC, depending what you chose to Display Study by), **Date Posted**, **Subject**, **Recipient(s)**, and **Additional Recipient(s)**.

Click the **View** icon to view the actual notification that was sent. A screen similar to the screenshot below opens, containing information that is read only.

System Administration - Audit Notifications ◀ Back

<p>Send Email <input checked="" type="checkbox"/></p> <p>Subject Review Response</p> <p>Author Administrator</p> <p>Recipient(s):</p> <p>Additional Recipients(s):</p> <p>Attachments No Attachments have been added to this message</p>	<p>Content</p> <p style="text-align: center;">Pre-Review Corrections Notification</p> <p>Study Title: "Swine Management and Production" IACUC Number: GH-14001-1</p> <p>Review Board: Committee 01 Meeting Date : 08/25/2014 Meeting Outcome: Approved Pending</p> <p style="text-align: right;">Date: August 12, 2014</p> <p>Dr. Dr. Susan M. Investigator, Ph.D.,</p> <p>The Review Board has completed a review of your recent submission. Based on the above noted status, the protocol is being returned to you for your corrections and/or additions. Please log in to the iMedRIS system and a Review Response Submission Form will appear on the task bar of your home page. Please note your submission will not be assigned for committee review until all of the changes have been addressed.</p> <p>Thank You,</p>
--	--

User Management

User Management	Grant User Access & Define Roles
Letter Signoff	User Training
Reports	User Vaccination History

Grant User Access and Define Roles

This page lists any users who currently have a role on the review board.

IACUC - Grant User Access & Define Roles Back							
+ Add a New Member X Delete Selected Member(s)							
10 result(s) found...							
<input type="checkbox"/>	Edit	Member Name	Committee Name	Role	Voting	Specialty	Affiliation
<input type="checkbox"/>		Administrator	Committee 01 Committee 02	Board Member Board Member	No No	Orthopedist	Affiliation 1
<input type="checkbox"/>		Chairperson, Gregory	Committee 01	Chairperson	No		
<input type="checkbox"/>		Coordinator, Dan	Committee 01	Coordinator	No	Medical Oncology	Affiliation 1
<input type="checkbox"/>		Coordinator, Jan	Committee 01	Coordinator	No		
<input type="checkbox"/>		Member, Frank	Committee 01	Board Member	Yes		
<input type="checkbox"/>		Member, George	Committee 01	Board Member	Yes	Orthopaedic Surgery	Affiliation 1

Any user who has a role on the IACUC review board populates in this list. The list contains their name, what committee(s) on the board they belong to, what their role is, and if they are a voting member. If their account has the information set up, their Specialty and Affiliation displays as well.


You can change a user’s access by clicking on the icon in the **Edit** column.

IACUC - Grant User Access & Define Roles Back																		
Save Member Info																		
Name: Member, Frank, Ph.D.	<input type="checkbox"/> Grant IACUC Administrative rights																	
Highest Degree Earned: Ph.D.	<input type="checkbox"/> Grant IACUC Junior Administrative rights																	
Gender: Male	<table border="1"> <thead> <tr> <th>Committee Access</th> <th>Committee Name</th> <th>Voting Member</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Committee 01</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>		Committee Access	Committee Name	Voting Member	<input checked="" type="checkbox"/>	Committee 01	<input checked="" type="checkbox"/>										
Committee Access	Committee Name	Voting Member																
<input checked="" type="checkbox"/>	Committee 01	<input checked="" type="checkbox"/>																
Specialty: Medical Oncology	<table border="1"> <thead> <tr> <th colspan="2">Roles</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/> Alternate Member</td> <td>for: <input type="checkbox"/> Administrator <input type="checkbox"/> Chairperson, Gregory <input type="checkbox"/> Member, George <input type="checkbox"/> Member, Joe <input type="checkbox"/> Member, Robert <input type="checkbox"/> Member, Nancy <input type="checkbox"/> Member, Sue</td> </tr> <tr> <td><input checked="" type="radio"/> Board Member</td> <td><input type="radio"/> Expediting Board Member</td> </tr> <tr> <td><input type="radio"/> Coordinator</td> <td><input type="radio"/> Administrative Assistant</td> </tr> <tr> <td><input type="radio"/> Chairperson</td> <td><input type="radio"/> Ex-Officio Member</td> </tr> <tr> <td><input type="radio"/> Data Entry Member</td> <td><input type="radio"/> Consultant/Ad Hoc Reviewer</td> </tr> <tr> <td><input type="radio"/> Non-Voting Member</td> <td><input type="radio"/> New Board Role</td> </tr> <tr> <td><input type="radio"/> Vice-Chairperson</td> <td></td> </tr> </tbody> </table>		Roles		<input type="radio"/> Alternate Member	for: <input type="checkbox"/> Administrator <input type="checkbox"/> Chairperson, Gregory <input type="checkbox"/> Member, George <input type="checkbox"/> Member, Joe <input type="checkbox"/> Member, Robert <input type="checkbox"/> Member, Nancy <input type="checkbox"/> Member, Sue	<input checked="" type="radio"/> Board Member	<input type="radio"/> Expediting Board Member	<input type="radio"/> Coordinator	<input type="radio"/> Administrative Assistant	<input type="radio"/> Chairperson	<input type="radio"/> Ex-Officio Member	<input type="radio"/> Data Entry Member	<input type="radio"/> Consultant/Ad Hoc Reviewer	<input type="radio"/> Non-Voting Member	<input type="radio"/> New Board Role	<input type="radio"/> Vice-Chairperson	
Roles																		
<input type="radio"/> Alternate Member	for: <input type="checkbox"/> Administrator <input type="checkbox"/> Chairperson, Gregory <input type="checkbox"/> Member, George <input type="checkbox"/> Member, Joe <input type="checkbox"/> Member, Robert <input type="checkbox"/> Member, Nancy <input type="checkbox"/> Member, Sue																	
<input checked="" type="radio"/> Board Member	<input type="radio"/> Expediting Board Member																	
<input type="radio"/> Coordinator	<input type="radio"/> Administrative Assistant																	
<input type="radio"/> Chairperson	<input type="radio"/> Ex-Officio Member																	
<input type="radio"/> Data Entry Member	<input type="radio"/> Consultant/Ad Hoc Reviewer																	
<input type="radio"/> Non-Voting Member	<input type="radio"/> New Board Role																	
<input type="radio"/> Vice-Chairperson																		
Relationship to the Institution: Affiliated																		
Affiliations: Affiliation 1																		
Representational capacity: Scientist																		
Representative of specific entity: Radiation Safety																		
Address:																		
1234 Main Street Redlands, CA 92374																		
Primary Number: (909) 555-1234																		
Cell Number: (909) 555-4321																		
Pager Number: (909) 555-5678																		
Fax Number: (909) 555-8765																		
Primary Email: fmember@irisgh.edu																		

A page listing their contact information as well as their role information opens. You can change their role by selecting another role within a committee. Click on the **Save Member Info** button if you make any changes before returning to the list.

You can also add a new member to the board if their account has already been created in iRIS. Click on the **Add a New Member** button. This takes you to a search list of all other users in the database who do not have a role on the board. You can select a user and click on the **Save Selected Members** button to add them to the board.

IACUC - Add new Review Board Members ← Back



Last Name:

First Name:

User ID:

Status: All ▼

18 result(s) found... 1 - 10 ▶




	User Name	User ID>	Primary Department	Login Enabled	Status
<input type="checkbox"/>	Administrator, Adam Jr.	jradmin	None Selected	Yes	Active
<input type="checkbox"/>	Chair, William	departmentchair	GH - 12345 - Department	Yes	Active
<input type="checkbox"/>	Coordinator, Mary Jane, R.N.	studycoord	GH - 12345 - Department	Yes	Active
<input type="checkbox"/>	Investigator, P	test-pi	GH - 12345 - Department	Yes	Active
<input type="checkbox"/>	Dr. Investigator, Patrick, Ph.D	piuser	GH - 12345 - Department	Yes	Active
<input type="checkbox"/>	Dr. Investigator, Susan M., Ph.D.	pi2user	GH - 00232 - Oncology	Yes	Active

Once you choose a user and add them to the board, navigate to that account to setup their specific role on the board, in the same way you would edit the current access of a current board member, as described above.

User Training

The **User Training** tool allows you to view and set each user's training record. For additional information aside from what is described here, please see the Sys Admin – User Training - Full manual.

User training can be part of your system's workflow to check if Key Study Personnel are up-to-date with the review board's required training or education. If your site does not involve your Training verification in the workflow, it is not required that you enter this information into the system. Contact your system administrator for questions concerning your system's workflow.

The opening screen initially displays a list of all the study personnel in the system as well as the users associated with your review board. This screen is one of the many methods to view a user's contact information in the system. The table displays User Name, UIN, Primary Department, Training Group, and Status of the training (Active, Never Active, or Expired), and Override (indicates whether or not the system ignores the user status and treats the user as always "Active"). The  icon signifies that the user has at least one active training record on file, which is not expired. The  icon represents that there is no valid training record on file. The  icon signifies that this user's training record has expired. Find specific users by adding any known information into the search options at the top of the screen and clicking the **Find User** button.

User Administration - User Training List Back

Last Name:
 First Name:
 UIN: Find User
 Status:

8 result(s) found... 1 - 8

Edit/View	User Name	UIN	Primary Department	Training Group	Status	Override
	admin1, admin1	admin1			Never Active	No
	Administrator	ADMIN	ADMIN. - RED - Redlands		Never Active	No

To set up the training record for a user, select the **Edit/View** icon next to the appropriate user or select the **Name** of the appropriate user. A new page displays (see below). The user’s information displays in read-only format.

User Administration - Training record list for Coordinator, Mary Jane, R.N. Back

*User_ID: studycoord Job Title: Degree: R.N. Employee ID: Specialty: Relationship to the Institution: <input checked="" type="radio"/> Affiliated <input type="radio"/> Non-Affiliated	Name: Mary Jane Coordinator Status: Active Email Address: studycoord@gh.test.edu Primary Number: (909) 555-1234 Cell Number: Pager Number: Fax Number:	Login Enabled: Yes Mailing Address: test
---	--	--

Edit/View	Training Group	Courses (Course Date - Expiration) All Courses must be green within one rule for the group to be valid	Status	Override
	IACUC	<u>Rule 1</u> Basic Course (04/16/2013 - 04/16/2014) <u>Rule 2</u> Refresher Course (04/16/2014 - 04/16/2015)	Active	No

The above screen shows the users **Training Group Status**. Listed on this page are Training Groups associated to the user. Next to each group is a list of courses the user has taken applicable to that group. From this screen you can Edit/View User Training Courses, Reevaluate Training Status, Add a New Training Group, or Delete Training Group(s).

If you click the **Edit/View** icon next to a Training Group, you are brought to the following screen:

User Administration - User Training Back

Group Name: IACUC

Override Flag: Yes No

Status:

Within this screen, the Group Name is read-only, but you are able to edit the Override Flag or the (Training) Status.

Override Flag – Set this to “Yes” to override any necessary training rules setup for the group for this user only (This feature is applicable for administrator accounts in the system). This means that the system would overlook the user’s current Status when conducting a training status check, so the user would appear as always Active in training and never Expired or Not Active.

(Training) Status – Drop down list contains:

1. **Never Active:** This means that the training was never set. When a User is created, this is the default setting.
2. **Active:** This means your training is currently active.
3. **Expired:** This means your training has passed its expiration date.

If changes are made, click the **Save Training Group** button and you will return to the previous page.

Clicking the **Reevaluate Training Status** button revalidates the current user's training.

To add a new training group, click the **Add a New Training Group** button, which brings you to the following page (this is the same page you would see if you were to click **Edit/View** next to a Training Group).

User Administration - User Training ◀ Back

Save Training Group

Group Name:	<input type="text" value="New"/>
Override Flag:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Status:	<input type="text" value="Active"/>

Group Name – Select your desired training group from the drop down list. (This is a configurable list that can be updated from System Administration > List Configuration and Maintenance, under Define Training Groups).



Override Flag – Set this to “Yes,” to override any necessary training rules set up for the group for this user only.

(Training) Status – Select from the drop down list as defined above.

Upon making your selections, click **Save Training Group** and you will be brought back to the user's Training Record List.

To delete a training group, check/select the box to the left of the training group you wish to remove from the list and click the **Delete Training Group(s)** button. By clicking the button at the top of the column in the table, you have the option to select/deselect all groups if needed.

Within the Training record list for the user you have selected, there is a tab for **User Training Courses**. Click this tab and you will be brought to the following screen displaying a Training Record List with specific courses taken by the user:

User Training Group Status		User Training Courses				+ Add a New Training Course	✖ Delete Training Course(s)
	Edit/View	Course Name	Course Date	Expiration Date	Score	Description	
<input type="checkbox"/>		Basic Course	04/16/2013	04/16/2014	95		
<input type="checkbox"/>		Refresher Course	04/16/2014	04/16/2015			

This screen displays a table that includes the Course Name, Course Date, Expiration Date, Score, and a Description of the course. By clicking the **Edit/View** icon to the left of a course, you are brought to the screen below:

The screenshot shows a web form titled "User Administration - User Training Course". At the top right, there is a "Back" button and a "Save Training Course" button. The form fields are as follows:

- *Course Name:** Basic Course (read-only)
- Course Date:** 04/16/2013 (with a calendar icon)
- Expiration Date:** 04/16/2014 (with a calendar icon)
- Score:** 95
- Description:** (empty text area)
- Comments:** (empty text area)

This screen displays with the Course Name as read-only. However, you are able to update the Course Date, Expiration Date, Score, Description, Comments, and Delete or Add New Document(s) (e.g. a training certificate). After making any necessary changes, click **Save Training Course** and **Back**.

To add a new training course for the selected user, click the **Add New Training Course** button and you will be brought to the following screen:

The screenshot shows the same web form, but with the following changes:

- *Course Name:** A dropdown menu is open, showing options: "--none--", "--none--", "Basic", and "Refresher".
- Course Date:** (empty date field)
- Expiration Date:** (empty date field)
- Score:** (empty text field)
- Description:** (empty text area)
- Comments:** (empty text area)

Course name – Contains a drop down list of all the courses that are defined in System Administration > List Configuration and Maintenance > Define Training Courses. This is a required field.

Course Date – The date the course was taken.


Expiration Date – The date that the training course expires. If you do not specify an Expiration Date, the user remains in good standing with the associated Training Group indefinitely.

Score – If you received a score in the training course, record it here.

A **Description** of the course and **Comments** can be added as well, if needed.

When finished adding the necessary information, click the **Save Training Course** button. This causes the document field to display (as shown below).

Comments:

0 result(s) found...

<input type="checkbox"/>	Edit	Title	File
No documents have been added.			

Here you can add document(s) associated with the particular training course for you (e.g. training certificate). When you save the course, it will be added to the list of courses within that group for that user.

To delete a training course, click the checkbox next to the course record, and then click the **Delete Training Course(s)** button.


The system automatically checks the expiration dates for training courses and automatically updates the status of the course (based on the rules defined for a particular training group setup by the System Administrator).

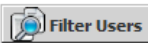
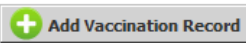
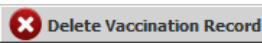
User Vaccination History

User Vaccination History is an area where you can go to manage and view Study Personnel and their current vaccination records on file. When a user has a record they would like to track in the system, a review board administrator can come to this page to log their vaccination record into the system.

Listed in this area are current records. A user can have multiple vaccination records, depending on what type of vaccination and when the dates the vaccination was administered, so it is common to see one user listed multiple times.

You can use the filters at the top of the page to locate a particular user, status (Active or Expired), or vaccination type. If you do use the filters, be sure to click the **Filter Users** button at the top of the page in order for the chosen filters to take effect.

User Administration - User Vaccination List 







  

Last Name: Status:





First Name: Vaccination:

User ID:

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

<input type="checkbox"/>	Edit/View	Name	User ID	Vaccination Name	Administered Date	Expiration Date	Auto Expire Record
	<input type="checkbox"/>	Administrator	ADMIN	Rabies	07/15/2014	07/31/2014	Yes
	<input type="checkbox"/>	Coordinator, Mary Jane, R.N.	studycoord	Tetanus	06/03/2014	06/03/2015	Yes
	<input type="checkbox"/>	Investigator, Patrick, Ph.D	piuser	Rabies	08/04/2014	08/04/2015	Yes
	<input type="checkbox"/>	Investigator, Patrick, Ph.D	piuser	Tetanus	07/01/2013	07/01/2014	Yes
	<input type="checkbox"/>	Investigator, Susan M., Ph.D.	pi2user	Rabies	08/04/2014	08/04/2015	Yes
	<input type="checkbox"/>	Investigator, Susan M., Ph.D.	pi2user	Tetanus	07/01/2014	07/01/2015	Yes

The columns on this page are as follows:

  **Status** – This column displays one of two icons. The  icon indicates that the user has an active vaccine status. The  icon indicates that the user’s vaccination record has expired.

Select – If you need to delete a user’s vaccination record, you would first select the record in this column, and then you would click the **Delete Vaccination Record** button.

Edit/View – To edit or view more details related to the user’s vaccination record, click the icon in this column.

Name – The first name, last name, and any degrees associated to the user display in this column.

User ID – The User ID displays in this column.

Vaccination Name – The Vaccination Name displays in this column.


Administered Date – The date recorded for the vaccination administration displays in this column.

Expiration Date – If the vaccination expires, that date displays in this column.

Auto-Expire Record – When you enter a vaccination record, you can indicate whether or not the vaccination ever expires, and if the system should automatically update the user associated to the record as expired. This information displays in this column.

You can add a new vaccination record to this list by clicking on the **Add Vaccination Record** button.

User Administration - Add User Vaccination Record
◀ Back


 **Select User**


***User Selection:**

***Vaccination Name:** --none-- ▾

***Vaccination Status:** Active ▾


Use Automatic Expiration of Vaccination flag: On Off


Administered Date: 

Expiration Date: 

A new page opens. You will first need to associate a user to the record. Click the **Select User** button from the top right corner of the screen.

Search User Directory
◀ Back

 **Save Selected User(s)**







**Directory
Browse/Find:**

Last Name: (You may enter a partial name to search)

First Name:

by Department: ▾

 **Find**

Check for Multiple	Select User	Training	User Name	Department	Email
			Investigator, Patrick, Ph.D	Department (primary)	pi@irisgh.edu

A Search User Directory page will open. From here use the **Last Name** and **First Name** fields to find the user, then click the icon in the **Select User** column.

*User Selection:	Patrick Investigator, Ph.D
*Vaccination Name:	--none--
*Vaccination Status:	--none-- Erysipelas Rabies Tetanus
Use Automatic Expiration of Vaccination flag:	
Administered Date:	<input type="text"/>
Expiration Date:	<input type="text"/>

You will be returned to the previous page, with the user displayed in the **User Selection** column.

Complete the rest of the information on the page. Associate the **Vaccination Name** from the drop down list. Vaccination List is a configurable list within Review Board Administration > List Maintenance Setup > Vaccination List. Next, indicate the status of the vaccination record. This is typically left as Active, and the system automatically sets the Status to Expired when the Expiration Date passes when **Use Automatic Expiration of Vaccination flag** is set to "Yes."

Also enter the **Administered Date** and the **Expiration Date** in the provided fields.

Click the **Save Vaccination Record** button when the necessary information is supplied. Note: You will be unable to save a record until the **User Selection** is applied to the record.

The record will be added to the list.

If a certain vaccination calls for a series of administration, or to renew an expired vaccination record, you can edit the existing vaccination record and update it with the new administration information. Locate the user and vaccination record and click the icon in the **Edit** column.

User Administration - Vaccination Record List for Investigator, Patrick, Ph.D		Back
Add a New Vaccination Record Delete Vaccination Record(s) Save Vaccination Record		
*User ID: Principal Investigator Job Title: Principal Investigator Degree: Ph.D Employee ID: 007 Specialty: Neurosurgeon Relationship to the Institution: <input checked="" type="radio"/> Affiliated <input type="radio"/> Non-Affiliated Affiliation: Affiliation 1		Name: Dr. Patrick Investigator Contact Information: Email Address: pi@irisgh.edu Primary Number: (909) 555-9100 Cell Number: (909) 555-9101 Pager Number: (909) 555-9102 Fax Number: (909) 555-9103 Mailing Address: Location: 123 Main Street Redlands, CA 92374
Vaccination Name: Tetanus Vaccination Status: Expired Use Automatic Expiration of Vaccination flag: <input checked="" type="radio"/> On <input type="radio"/> Off		
Administered Date	Expiration Date	
07/01/2013	07/01/2014	

The Vaccination Record List for the user opens. The top of the page displays the user's information, including contact information. Next, the Vaccination information displays: **Vaccination Name**, **Vaccination Status**, and **Use Automatic**

Expiration of Vaccination flag. You can change the status or the override flag, if necessary. If you change this information, be sure to click the **Save Vaccination Record** button at the top right of the page before exiting.

Below this are any records of vaccination administration. This is reflected with the **Administered Date** and **Expiration Date**. Modify this information by clicking the icon in the **Edit** column.

Records are also deleted by clicking on the checkbox next to the administration record, then clicking on the **Delete Vaccination Record(s)** button on the top right of the page.

Add a new record by clicking on the **Add a New Vaccination Record** button.

This allows you to capture an **Administered Date** and **Expiration Date**. Click the **Save Vaccination Occurance Record** button when this information is added.

Vaccination Name: Tetanus		
Vaccination Status: Expired		
Use Automatic Expiration of Vaccination flag: <input checked="" type="radio"/> On <input type="radio"/> Off		
<input checked="" type="checkbox"/>	Administered Date	Expiration Date
<input type="checkbox"/>	07/14/2014	07/14/2015
<input type="checkbox"/>	07/01/2013	07/01/2014

The Vaccination Record List updates with the new administration record, as well as retains previous administrations. This allows you to keep a running history for this user's vaccination.

Letter Signoff

Letter Signoff allows you to electronically sign any outcome letters that have been routed to you for approval.

You may be assigned to electronically sign an outcome letter. From your homepage, select **Letter Signoff** in the **IACUC Assistant**. Signoff for individual letters can also be accessed through the tasks displayed on the home screen. The screen opens with two tabs: **Incomplete** and **Complete**. All submission letters that are awaiting your signature are listed under the incomplete tab.

IACUC - Assigned Letter Signoff List Back												
										Print Friendly		Display Submissions by: IACUC Number
Incomplete		Complete										
Filter Letters By : All											Sign all selected Letters	
<input type="checkbox"/>	Edit/View Letter	Click to open	IACUC Number	Ref Number	Type	Review Process	Date Letter Created	Continuing Review Due	Expiration Date	Principal Investigator	Assigned Analyst	
<i>Full Approval Letter</i>												
<i>Mouse Study II</i>												
<input type="checkbox"/>			GH-14-006	000233	Submission Correction for Initial Review Submission Form	On Agenda	08/12/2014		08/24/2015	Investigator, Susan M., Ph.D.	Coordinator, Jan	
<i>Expedited Approval</i>												
<i>Mouse Study IV</i>												
<input type="checkbox"/>					Initial Review					Investigator, Susan		

The submissions in the list are displayed by one of the following: the **IACUC Number**, **IRB Number**, **IBC Number**, or other number (depending on which modules are setup in your instance of iRIS) using the dropdown box in the top right of the screen.

The **Letter Title**, **Study Title**, **IACUC Number** (or the number chosen to display by), **Ref Number**, **Type**, **Review Process**, **Date Letter Created**, **Continuing Review Due**, **Expiration Date**, **PI**, and **Assigned Analyst** of the study submission all display in the table. The list can be filtered by **Batched only** or **Non-Batched only** (Batched or non-batched is set when the letter itself is created) by changing the **Filter Letters By** to the desired option (as shown below).

IACUC - Assigned Letter Signoff List Back												
										Print Friendly		Display Submissions by: IACUC Number
Incomplete		Complete										
Filter Letters By : Batched only											Sign all selected Letters	
<input type="checkbox"/>	Edit/View Letter	Click to open	IACUC Number	Ref Number	Type	Review Process	Date Letter Created	Continuing Review Due	Expiration Date	Principal Investigator	Assigned Analyst	
<i>Expedited Approval</i>												
<i>Mouse Study IV</i>												
<input type="checkbox"/>			GH-14-012	000240	Initial Review Submission Form	Expedite	08/12/2014			Investigator, Susan M., Ph.D.		
<i>Expedited Approval</i>												

To review the submissions before signing these letters, select the icon in the **Click to open** column. The submission processing screens will open. If you are the IACUC Coordinator, then all the tabs display. Otherwise, only the tabs your role has access to display.

Study Number: M4
PI: Investigator, Susan M., Ph.D.

IACUC - Initial Review Submission Form

Back

Submission Forms

Ref Number: **000240** IACUC Number: **GH-14-012** Study Title: Mouse Study IV

Study Status: Pending - Submitted for

General Information

Submission Components

Correspondence

Submission History

Pre-review Screening

Review Checklist and Comments

General Information

Study Number: M4

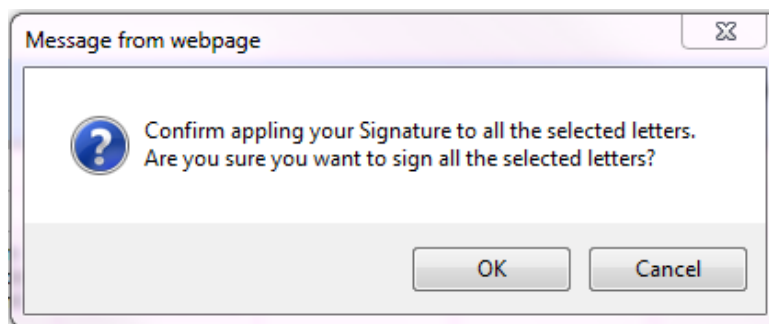
Edit the Master Lay Summary To construct the recombinant Lactococcus lactis as oral delivery vaccination against malaria.

Click Here to edit the submission summary

You can apply your electronic signature using one of the following two methods:

- 1. Batch: Review and sign off on all required items at once** (the quickest method).

When you are ready to sign off on all the letters select the items' checkboxes in the first column and click the **Sign all selected Letters** button. You are then prompted with the alert message below.



Select the **OK** button to confirm the signoff. The screen displays as shown below.

Electronic Signature

Back

save

This form requires your electronic signature.

Jan Coordinator please enter your User ID and Password below:

User ID:

Password:

Apply your iRIS user ID and password (electronic signature) and select the **Save** button. The screen below displays for a few moments; this screen displays whether or not the letter is already in PDF form or if the letter still has to be routed for signature.



2. Non-Batch Review and signoff item-by-item (longer method).

Select the **Edit/View Letter** icon and the screen similar to the screen shot below displays.

Letter Signoff Back

Save Letter Review

Reference Number:
000032

Submission Type:
Submission Correction for Initial Review Submission Packet

IACUC Number:
GH-15001

Study Number:
Mouse Study

Assign Analyst:
Jan Coordinator

Coordinator, Jan do you Approve or Deny this letter?
--none--

[Click here to add comments.](#)
No Comments have been posted.

GH IACUC

Today's Date: August 10, 2015

To: Susan Investigator

RE: GH-15001 Mouse Study

If you are allowed to change the content of the letter, the contents will appear in Word format; if not, the letter will appear in PDF format.

The submission information (**Reference Number**, **Submission Type**, and **Approve/Deny**) appears on the left side of the screen. You are allowed to add comments to the letter by selecting the **Click here to add comments** link. A dialog box displays (see below). Enter your comments and click the **OK** button.

Signoff Comments Editor

ABC [Rich Text Editor Icons]

Normal (...) Font Size [Undo] [Redo] [Insert]

|

Cancel Apply

You can approve or deny the letter by selecting the appropriate choice from the dropdown menu. A new field for your electronic signoff appears after you make your selection (see below).

Reference Number:
000032

Submission Type:
Submission Correction for Initial Review Submission Packet

IACUC Number:
GH-15001

Study Number:
Mouse Study

Assign Analyst:
Jan Coordinator

Coordinator, Jan
do you Approve or Deny this letter?

Approve

To approve this letter, Please enter User ID & Password:

User ID:

Password:

[Click here to add comments.](#)

No Comments have been posted.

Enter your iRIS User ID and Password (electronic signature) and select the **Save Letter Review** button. After all the above operations are completed your main **Assigned Letter Signoff** list will read, "No Letters to Review and signoff."

The **Complete** tab displays all the letters for which you have a completed signature. This list can be filtered to a specific date range using the Start and End Date Fields. When the date range is set, click the **Refresh page** button to update the screen according to the filtered dates.

IACUC - Assigned Letter Signoff List Back										
Start Date: 07/13/2014		End Date: 08/12/2014		<input type="button" value="Refresh page"/>		<input type="button" value="Print Friendly"/>		Display Submissions by: IACUC Number		
Incomplete		Complete								
Click to View the Letter	Click to open	IACUC Number	Ref Number	Type	Review Process	Date Letter Created	Continuing Review Due	Expiration Date	Principal Investigator	Assigned Analyst
		GH-14-006	000233	Submission Correction for Initial Review Submission Form	On Agenda	08/05/2014		08/24/2015	Investigator, Susan M., Ph.D.	Coordinator, Jan
<i>Full Approval Letter</i> <i>Mouse Study II</i>										
<i>Full Approval Letter</i> <i>Mouse Study II</i>										

Reports

The **Reports** tool allows you access and the ability to run the Pre-canned Reports that come with the IACUC Assistant module. (See the IACUC Assistant -Reports Manual for more information)

The Reports page lists the available reports grouped into a variety of categories. Clicking on a report link allows you to run and set specific parameters for the report. The parameters and filter options for each report will vary based on the requested information.

Within each report you have the option to display the report in PDF, HTML, and Excel format.

Display Report as: PDF HTML Excel

When you click the **Helpful Information** button, the **Report Generation Help** window populates. The **Helpful Information** window displays notes that assist you in running the report and displays the description of the report.

Report Generation Help X

Learn about iRIS Reports

Reporting System Helpful Hints

You are using Jasper Report Version :2.0.4

Description : This report lists the studies and can be filtered by department name, code, school code, and study status. The listing of studies for each study contains the study title, department, department code, school code, RB Number, RB Expiration, RB Initial Approval Date, Continuing Review Date, PI, and any funding agencies.

Notes :

- Fill all input fields
- Please follow the correct date format (MM-DD-YYYY)
- Do not click twice on the Run button
- Refresh the page after viewing the report
- Some drop down menus are filtered by your access privileges
- Be specific in your selections

You can find description of the report under System Administration/Reports Administration You can also add, delete, modify, move, download and upload jasper reports from reports administration. The information in this report may be restricted by the user role, department access, review board or current module.

Review Board Administration

The **Review Board Administration** tool allows you to setup configuration lists, define Outcome Letters, define Meeting Agenda and Minutes templates, and setup automatic review board related notifications. Review Board Administration is typically reserved for Review Board Administrators. See the IACUC Assistant – RB Administration manual for more information.