



IACUC ASSISTANT

Review Board Administration

Software Version: 11.02.01

Manual Version: P1

Manual Published: 2/24/2020

Contents

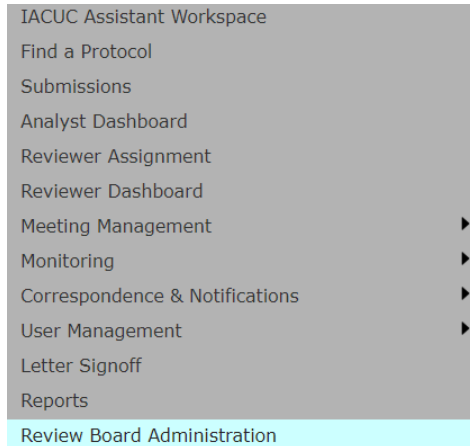
Introduction.....	5
Navigation in iRIS™.....	6
Path Directory Tree.....	6
Back Button.....	7
System Setup Tab.....	8
Copy Configurations.....	8
Board Definition.....	11
Board Configuration Options.....	12
Broadcast Notice.....	14
Add a New Notice.....	14
Draft Notice.....	18
Edit a Broadcast Notice.....	19
Delete a Broadcast Notice.....	21
Setup Committee List.....	22
Edit Committee.....	22
Add Committee.....	23
Delete Committee.....	25
Setup Review Board Roles.....	26
Edit Board Role.....	28
Add Board Role.....	30
Delete Board Role.....	32
Setup Role Access.....	33
Setup Electronic Document Stamp.....	35
Add Electronic Document Stamp.....	36
Edit Electronic Document Stamp.....	39
Delete Electronic Document Stamp.....	43
Setup Study Numbering.....	44
Setup Outcome Letter Groups.....	46
Add Outcome Letter Group.....	46
Edit Outcome Letter Group.....	49
Delete Outcome Letter Group.....	52

Setup Agenda Categories.....	52
Agenda Filter.....	54
Add Agenda Filter.....	55
Edit Agenda Filter.....	56
Delete Agenda Filter.....	57
Filter User Defined.....	58
Add Agenda Category.....	64
Edit Agenda Category.....	68
Delete Agenda Category.....	71
Document Templates.....	72
Using Merge Codes in Document Templates.....	72
Merge Code List.....	74
Merge Codes Applicable to Animal Resource Center (ARC).....	75
Merge Codes Applicable to Meetings.....	75
Setup Bundle Email Template.....	76
Setup Finalized Agenda Document Template.....	82
Setup Agenda Revision Document Template.....	85
Setup Expedite Report Template.....	86
Setup Meeting Minutes Template.....	87
Setup Outcome Letter Groups.....	88
Add Outcome Letter Group.....	89
Edit Outcome Letter Group.....	92
Delete Outcome Letter Group.....	94
Setup Outcome Letter Templates.....	95
Add Outcome Letter Template.....	95
Edit Outcome Letter Template.....	97
Delete Outcome Letter Template.....	101
Setup Correspondence Templates.....	102
Add Correspondence Template.....	103
Edit Correspondence Template.....	105
Delete Correspondence Template.....	106
Setup Canned Motion.....	108

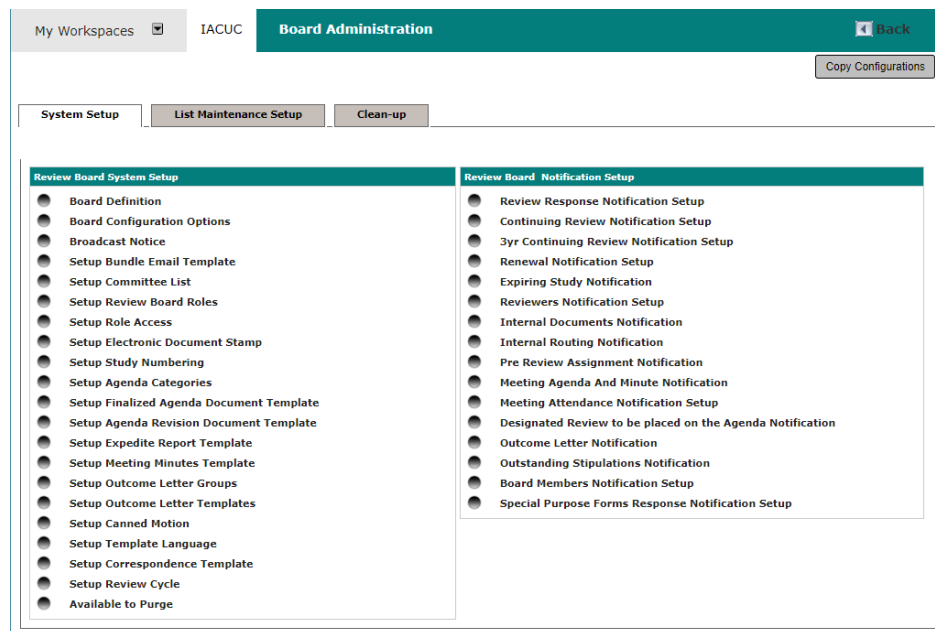
Add Canned Motion.....	109
Edit Canned Motion.....	111
Delete Canned Motion.....	113
Setup Template Language.....	114
Add Template Language.....	115
Edit Template Language.....	117
Delete Template Language.....	119
Setup Review Cycle.....	120
Add Review Cycle.....	121
Edit Review Cycle.....	123
Delete Review Cycle.....	124
Available to Purge.....	125
Review Board Notification Setup.....	126
List Maintenance Setup Tab.....	126
Clean-up Tab.....	127
Transfer outstanding tasks.....	127
Document Management.....	130
Find a Study Results Section.....	133
Merging Document Versions.....	134

Introduction

IACUC Review Board Administration, accessed via IACUC Assistant > Review Board Administration, is where the designated Review Board Administrator sets up and manages configuration lists, review board options and roles, various types of document templates and module settings.



Clicking the Review Board Administration menu link (above) or the Review Board Administration icon in the IACUC Assistant Workspace loads the Board Administration page, as shown below.



This manual provides information and instructions pertaining to the links, tabs and controls accessible through the Board Administration page.

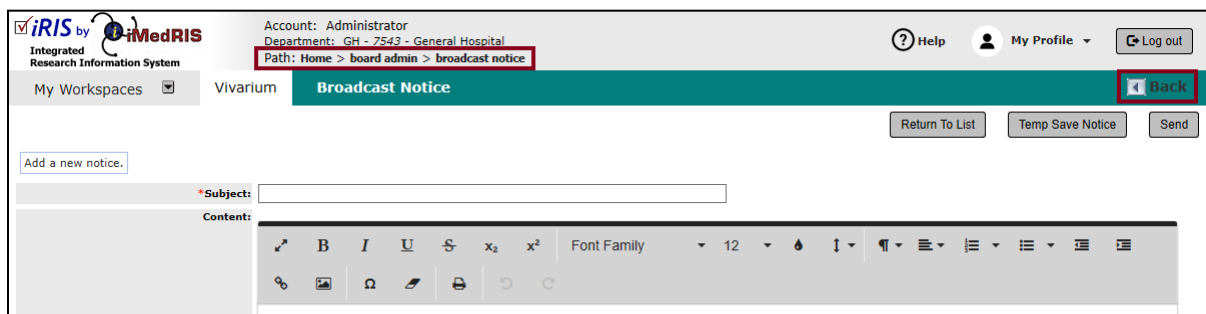
Navigation in iRIS™

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

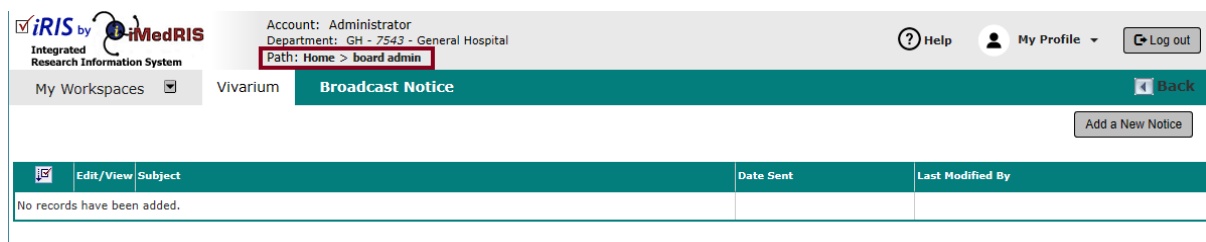
Path Directory Tree

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

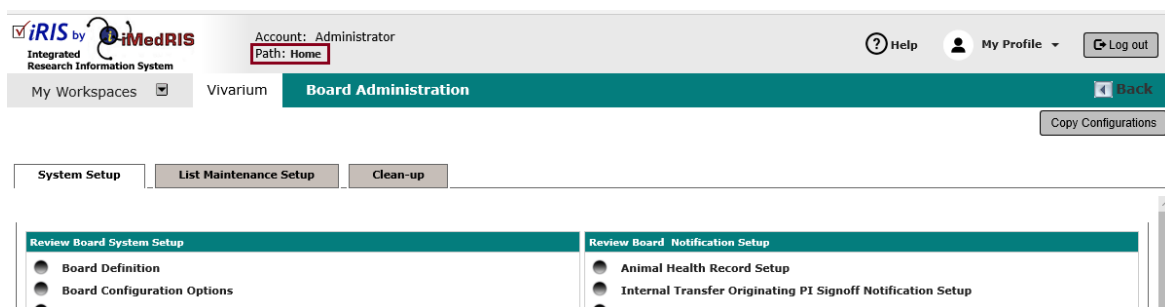
In the example shown the user is viewing the **Broadcast Notice Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



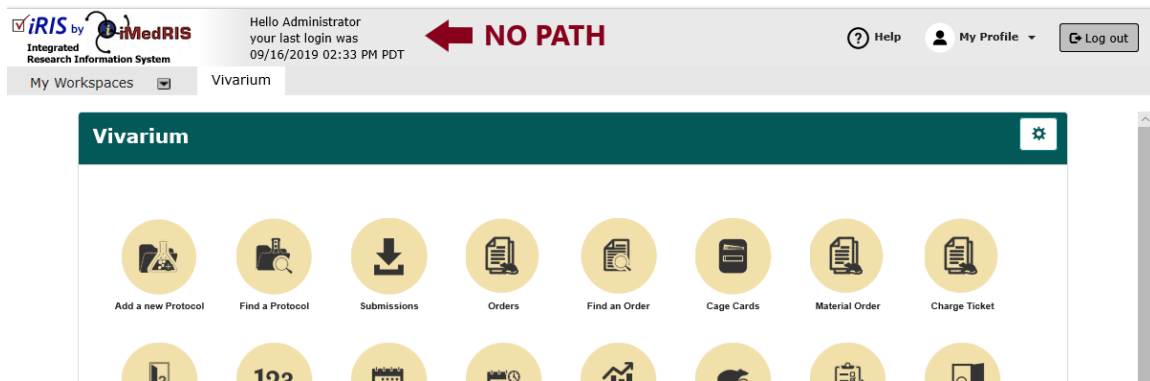
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



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

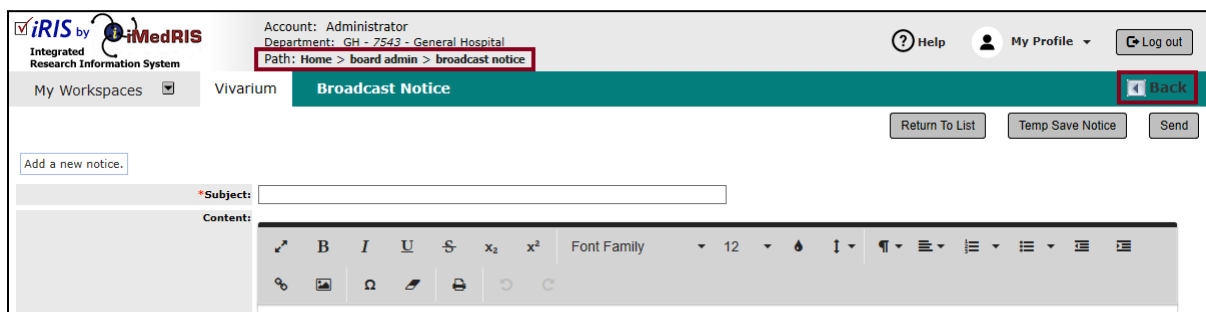


Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.

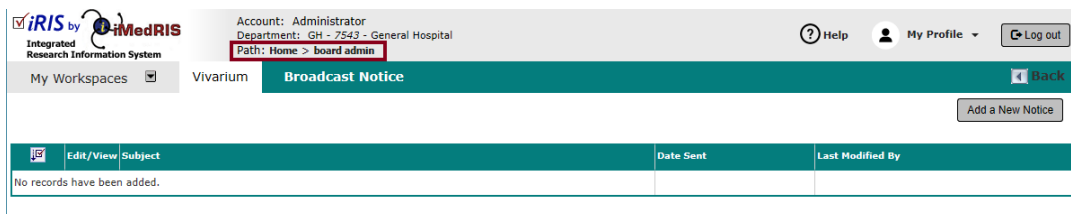


Back Button

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



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

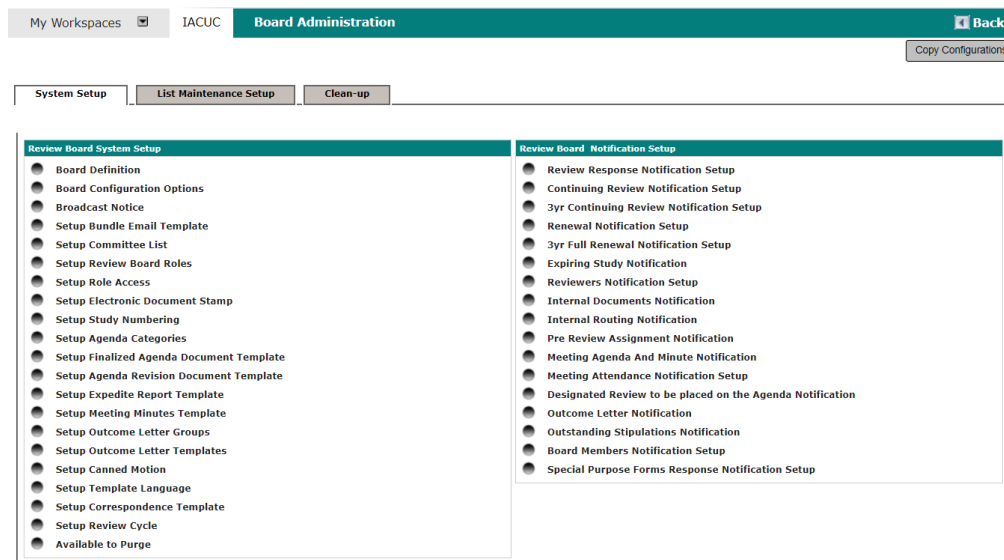


Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

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

System Setup Tab

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



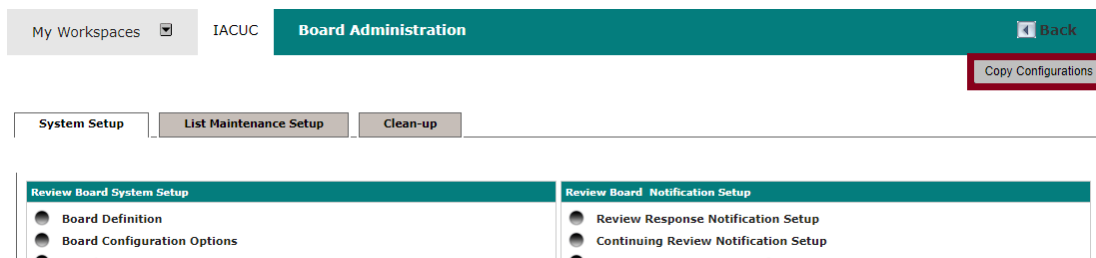
Copy Configurations

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

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

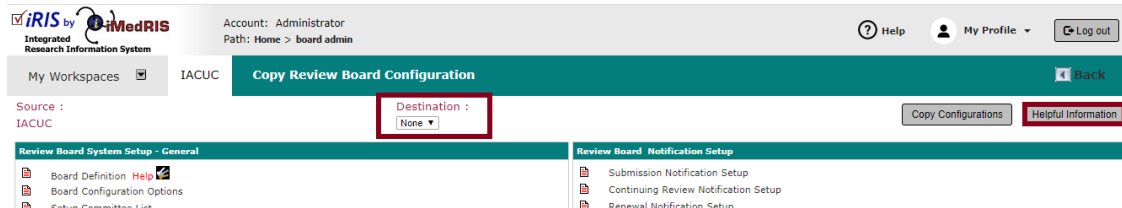
Note that configurations cannot be copied across review boards of different types (IRB to IBC, IRB to ARC, etc.). Within IACUC it is only possible to copy configurations across IACUC review boards.

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

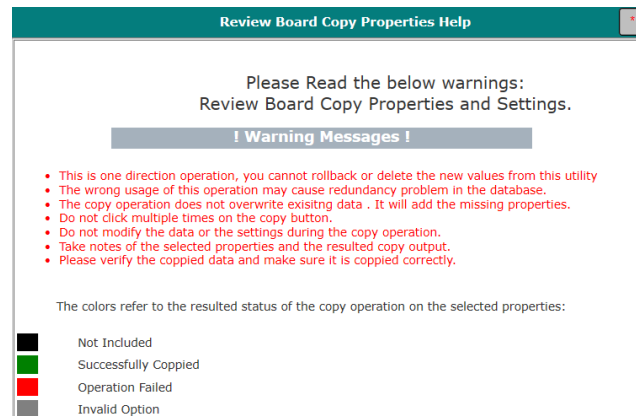


The **Copy Review Board Configuration** page displays. The page contains links to configurations that can be copied to another review board.

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

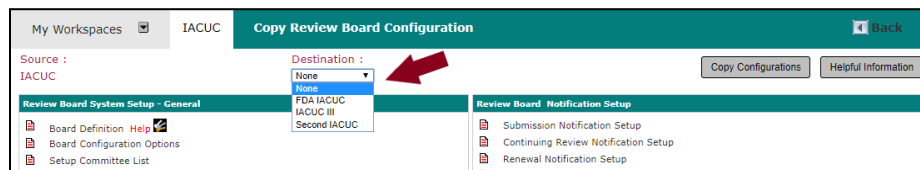


Click the **Helpful Information** button to view a popup containing important information and warnings about copying review board configurations.



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

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



Select boxes for applicable configuration items in the setup lists are now available.

Select the configuration item(s) to be copied to the selected destination by clicking the respective checkbox(es).

Note that the following configuration items of the **Source** IACUC board cannot be copied:

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

Click the **Copy Configurations** button to complete the copy process. Click the **Cancel Copy** button to cancel the process without saving changes.

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

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

My Workspaces IACUC Copy Review Board Configuration Back

Source : IACUC Destination : None Copy Configurations Helpful Information

Review Board System Setup - General	Review Board Notification Setup
Board Definition Help	Submission Notification Setup
Board Configuration Options	Continuing Review Notification Setup
Setup Committee List	Renewal Notification Setup
Setup Review Board Roles	Expiring Study Notification
Setup Role Access	Reviewer Assignment Notification
Setup Electronic Document Stamp	Reviewers Complete Notification
Setup Study Numbering	Internal Routing Complete Notification
Setup Agenda Categories	Pre Review Assignment Notification
Setup Finalized Agenda Document Template	Meeting Attendance Notification
ier.copyResult("Setup Finalized Agenda Document Template","RB_SETUP_AGENDA_TEMP")%>	Member Attendance Change Notification
Setup Agenda Revision Document Template	Designated Review to be placed on the Agenda Notification
Setup Expedite Report Template	Outcome Signoff Letter Notification
Setup Meeting Minutes Template	Outcome Signoff Complete Notification
Setup Outcome Letter Groups	Outcome Letter Notification
Setup Outcome Letter Templates	Outstanding Stipulations Notification
Setup Canned Motion	Internal Documents Notification

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

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

Board Definition

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

My Workspaces IACUC Board Administration

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Setup Bundle Email Template
- Setup Committee List
- Setup Review Board Roles

The **Setup Board** page is opened.

My Workspaces IACUC Setup Board Back

Save Definition

*Review Board Name: IACUC

*Review Board Type: Institutional Animal Care and Use Committee

Assurance Number: A3659-01

Assurance Expiration: 12/31/2012

Comments:

Primary Address:

Street: 3350 La Jolla Village Dr.

City: San Diego

State: CA

Zip/Postal Code: 92161

Country: United States

Primary Phone:

Phone Number: 858-552-8585 x 3774

Primary E-mail:

E-mail:

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

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

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

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

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

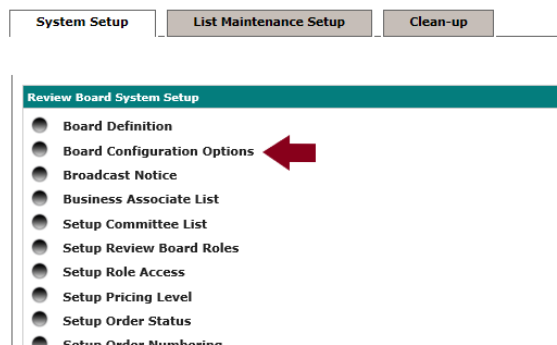
In the **Primary Phone** section, enter the **Phone Number** designated for contacting the board.

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

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

Board Configuration Options

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



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

My Workspaces ▾ IACUC Setup Board Properties [Back](#)

RB Properties List [Download Properties Script](#)

- Board Setup
- Document Processing
- Study Summary Info
- Submission Review Properties
- Reviewers
- Meeting Settings
- Security
- Multi-site Setup
- Recommendations and Stipulations
- Study Board Properties
- Amendments
- Submission Prereview
- Letter
- Submissions
- Notification
- Fee tracking
- Internal Routing
- Training

- 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.

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

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

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

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

My Workspaces ▾ IACUC Setup Board Properties [Back](#)

RB Properties List [Download Properties Script](#) [Save After Edit](#)

Property Name	Property Value
rb.allow_adult_benefit_assigned_list	☒ Yes ☐ No
rb.allow_adult_risk_assigned_list	☒ Yes ☐ No
rb.allow_change_of_business_associate_list	☒ Yes ☐ No
rb.allow_change_of_business_associate_type	☒ Yes ☐ No
rb.allow_change_of_device_list	☒ Yes ☐ No
rb.allow_change_of_drug_list	☐ Yes ☒ No
rb.allow_change_of_study_status	☒ Yes ☐ No
rb.allow_change_of_study_status_list	☒ Yes ☐ No
rb.allow_child_risk_assigned_list	☒ Yes ☐ No
rb.allow_document_outcome_list	☒ Yes ☐ No
rb.allow_issue_reporting_list	☒ Yes ☐ No
rb.allow_regulatory_determination1_list	☒ Yes ☐ No
rb.allow_regulatory_determination2_list	☒ Yes ☐ No
rb.allow_review_outcome_list	☒ Yes ☐ No
rb.allow_reviewer_rank_list	☒ Yes ☐ No
rb.allow_risk_assigned_list	☒ Yes ☐ No
rb.allow_termination_reason_list	☒ Yes ☐ No
rb.Auto_expire_exempt_protocols	☒ Yes ☐ No
rb.display_date_board_rec_column	☒ Yes ☐ No
rb.Edit_Master_Lay_Summary	☒ Yes ☐ No
rb.Master_Lay_Summary_Label	Master Lay Summary
rb.notify_use_continuing_review_due	☐ Yes ☒ No
rb.number_of_days_to_lock_submission	5
rb.restrict_change_of_rb_number	☒ Yes ☐ No
rb.restrict_user_training_to_board_member	☒ Yes ☐ No
rb.stamp_no_clinic_use	☐ Yes ☒ No
rb.use_auto_expiration	☒ Yes ☐ No
rb.use_auto_select_PI_and_Contact	☒ Yes ☐ No
rb.use_bundle_to_external_source	☐ Yes ☒ No
rb.use_continuing_review_notif_when_full_renewal	☐ Yes ☒ No
rb.use_create_study	☒ Yes ☐ No
rb.use_duplicate_rb_number	☐ Yes ☒ No

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

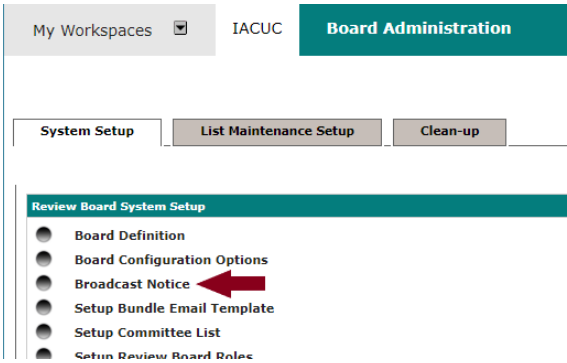
See the IACUC Assistant — Properties manual for more information on each individual property.

Broadcast Notice

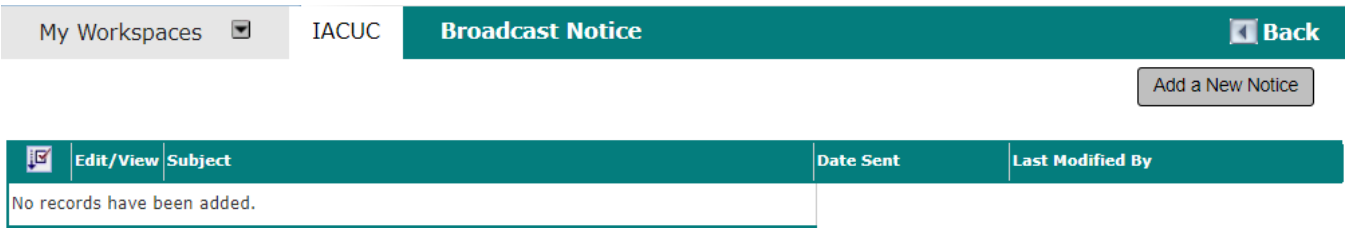
Broadcast Notice allows the system administrator to send an email to review board members and to users on studies associated with the review board. This is a useful tool for sending group alerts and messages.

*Note that the **Broadcast Notice** tool under iRIS™ System Administration—as opposed to System Administration within a module like IACUC—can send a message to all users in the iRIS™ system. The System Administrator must be cautious to use the correct **Broadcast Notice** tool for their purposes.*

To access **Broadcast Notice** options, navigate to IACUC Assistant > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.

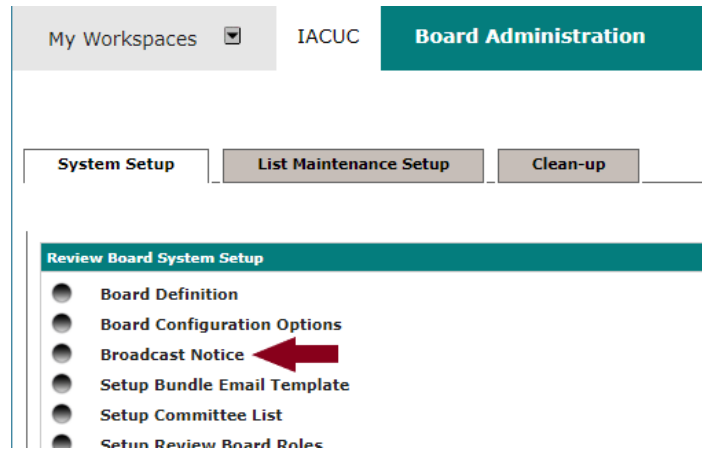


The **Broadcast Notice** page displays any broadcasts previously set up/sent out. The list is empty the first time the page is opened.

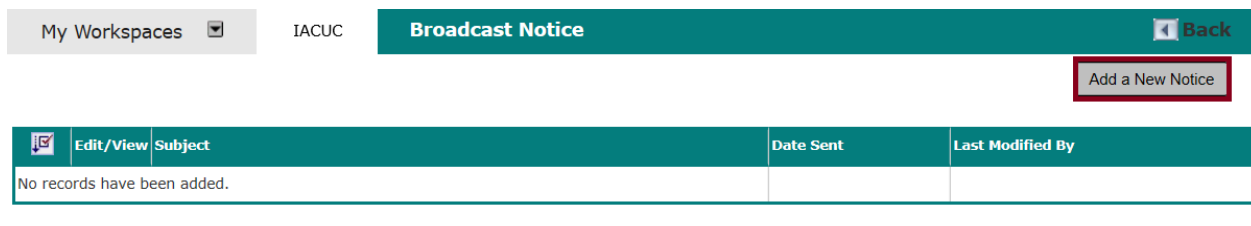


Add a New Notice

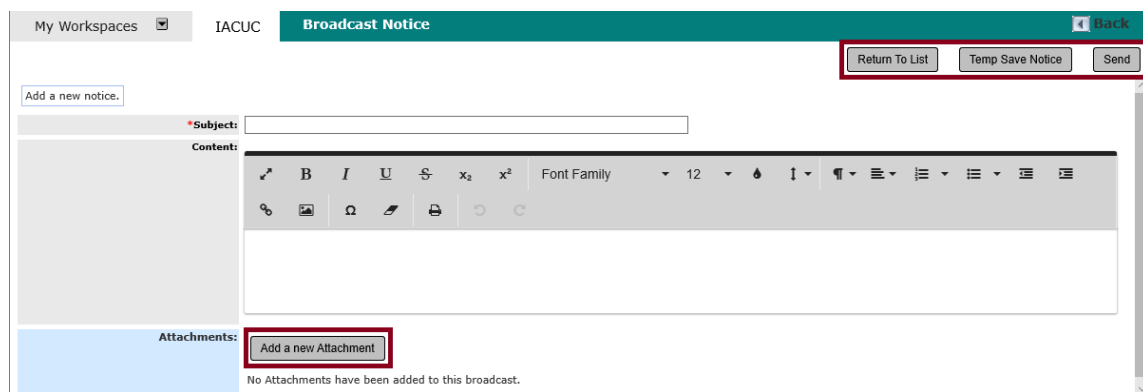
Navigate to IACUC Assistant > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.



The **Broadcast Notice** page displays any broadcasts previously set up/sent out. The list is empty the first time the page is opened.



Click the **Add a New Notice** button to create and send a message. The **Add a new notice** panel opens.



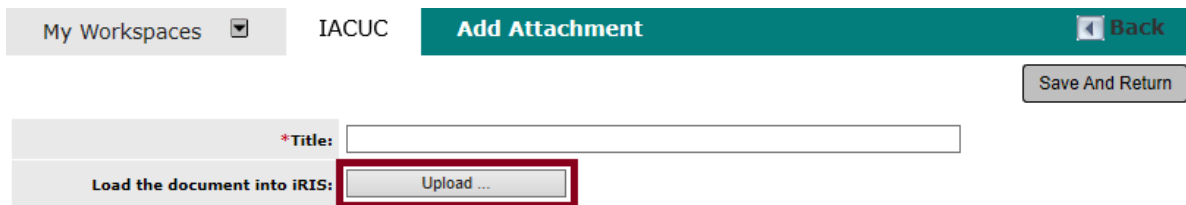
Click the **Return to List** button to cancel and return to the list of broadcast notices.

The **Temp Save Notice** button is used to save a notice draft, explained in greater detail in the Draft Notice subsection of this manual, immediately following the current subsection.

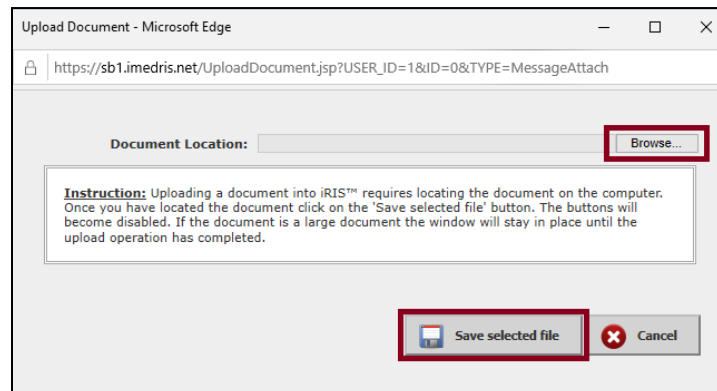
Enter a **Subject** and type, or copy and paste, desired text in the **Content** area. Use the toolbar to format text as desired. Notice that tools for insertion of hyperlinks and images are included.

Click the **Add a new Attachment** button to attach a document file to the notice.

An upload panel opens. Enter the **Title** of the document and click the **Upload** button.



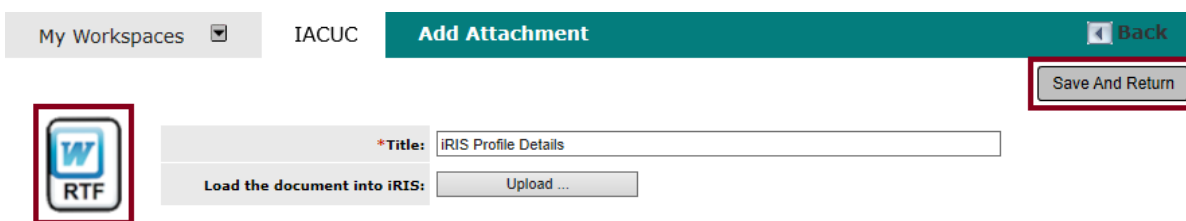
An upload dialog popup window displays.



Click the **Cancel** button to close the popup without uploading a document.

Click the **Browse** button to navigate to the document to be uploaded. When the file path is displayed in the **Document Location** field, click the **Save selected file** button to attach it to the notice record.

The **Add Attachment** panel refreshes, displaying an icon for the attachment to the left of the **Title**. Click the **Save and Return** button save the notice and attachment.



The attached document icon displays in a table in the **Attachments** area of the **Edit/View a notice** panel.

My Workspaces ▾ IACUC Broadcast Notice Back

Return To List Temp Save Notice Send

Edit/View a notice.

***Subject:** Please Verify Contact Information

Content:

Font Family 12

Contact information has been entered by administrative staff. Please verify that the contact information provided in your iRIS profile is complete and correct.

Attachments:

Add a new Attachment Delete Selected Attachments(s)

View Attachment	Attachment Name
☐ 	iRIS Profile Details

To view an attachment, click its icon.

To remove an attachment, click the select checkbox to the left of the document icon and click the **Delete Selected Attachment(s)** button.

Note that multiple attachments can be added, but users are still subject to institution or email server restrictions on file size for email attachments.

Click the **Send** button at the upper right corner of the **Edit/View a notice** panel to send the notice. A popup email distribution window opens for selection of notice recipients.

Click the **Cancel** button to exit without sending.

Please choose where email destination:

☒ Send to KSPs and review board members

Send Cancel

Note that **Send to KSPs and review board members** is selected by default when the popup opens. Click the checkbox to deselect that option and unlock the other two options: **Send to all KSPs** and **Send to review board members**.

Please choose where email destination:

☐	Send to KSPs and review board members
☐	Send to all KSPs
☐	Send to review board members

Select the applicable checkbox, then click the popup window **Send** button.

After the notice is sent the **Broadcast Notice** page displays, with the sent broadcast notice added to the list and its **Date Sent** field populated.

My Workspaces

IACUC

Broadcast Notice

Back

Add a New Notice

Delete Selected Notice

	Edit/View	Subject	Date Sent	Last Modified By
		Please Verify Contact Information	August 20, 2019	Administrator

Note that the **Edit/View** icon is still present but the select box at the far left, for notice deletion, is gone. Sent notices can be viewed but cannot be edited or deleted.

Draft Notice

When creating a new notice in the **Add a new notice** panel, it is possible to save the notice as a draft.

My Workspaces	IACUC	Broadcast Notice	Back
		Return To List	Temp Save Notice
Add a new notice.			
*Subject:			
Content:			

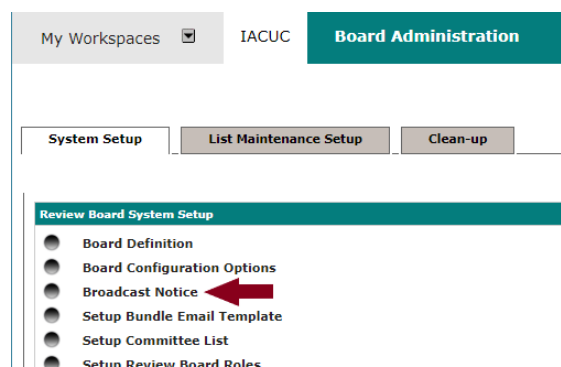
Enter a **Subject** line and desired content, then click the **Temp Save Notice** button to save a draft of the notice and return to the **Broadcast Notice** page. Note that draft notices do not have a **Date Sent** value in the list on the **Broadcast Notice** page.

My Workspaces		IACUC Broadcast Notice		
		Add a New Notice Delete Selected Notice		
	Edit/View	Subject	Date Sent	Last Modified By
		Please Verify Contact Information	September 17, 2019	Administrator
☐		Please Confirm Office Mail Drop Code		Administrator

Edit a Broadcast Notice

Draft broadcast notices can be edited (and sent) or deleted. Notices that have been sent cannot be deleted or edited, but they can be viewed.

Navigate to IACUC Assistant > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.



The **Broadcast Notice** page displays any broadcasts previously set up/sent out.

My Workspaces		IACUC Broadcast Notice		
		Add a New Notice Delete Selected Notice		
	Edit/View	Subject	Date Sent	Last Modified By
		Please Verify Contact Information	September 17, 2019	Administrator
☐		Please Confirm Office Mail Drop Code		Administrator

Draft notices do not have a value in the **Date Sent** column, which is how they can be easily identified in the **Broadcast Notice** list.

Click the icon in **Edit/View** column to the left of a draft title to open the draft and resume work on it.

The title of the Add a new notice panel changes to **Edit/View a notice** when a draft is opened.

The screenshot shows the 'Broadcast Notice' form in the IACUC Assistant application. At the top, there's a navigation bar with 'My Workspaces', 'IACUC', and 'Broadcast Notice'. On the right of this bar are buttons for 'Return To List', 'Temp Save Notice', and 'Send'. Below the navigation bar, there's a link 'Edit/View a notice.'. The form has three main sections: 'Subject', 'Content', and 'Attachments'. The 'Subject' field contains 'Please Confirm Office Mail Drop Code'. The 'Content' section has a rich text editor with various formatting tools (bold, italic, underline, strikethrough, subscript, superscript, font family, font size, bulleted list, numbered list, indent, outdent, link, unlink, image, link icon, unlink icon, redo, undo) and a text area containing the message: 'Administrative staff has entered mail drop codes for all study staff. Please confirm the mail drop code for your team.' The 'Attachments' section has a button 'Add a new Attachment' and a message 'No Attachments have been added to this broadcast.'

Click the **Return to List** button to return to the Broadcast Notice list page without saving changes.

Click the **Temp Save Notice** button to save changes and keep the notice as a draft.

Click the **Send** button to save changes and send the notice.

A popup email distribution window opens for selection of notice recipients. Click **Cancel** to exit without sending.

The screenshot shows a popup window titled 'Please choose where email destination:'. It contains a list box with one option: 'Send to KSPs and review board members', which is selected. Below the list box are two buttons: 'Send' and 'Cancel'.

Note that **Send to KSPs and review board members** is selected by default when the popup opens. Click the checkbox to deselect that option and unlock the other two options: **Send to all KSPs** and **Send to review board members**.

Please choose where email destination:

☐	Send to KSPs and review board members
☐	Send to all KSPs
☐	Send to review board members

Send Cancel

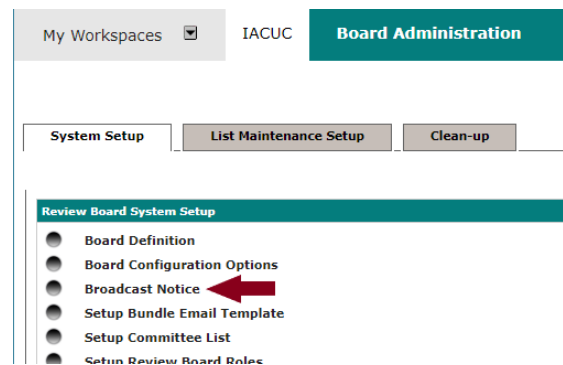
Select the applicable checkbox, then click the popup window **Send** button.

After the notice is sent the **Broadcast Notice** page displays, with the **Date Sent** field populated for the sent notice. Recall that sent notices cannot be edited or deleted.

Delete a Broadcast Notice

Draft broadcast notices can be edited (and sent) or deleted. Notices that have been sent cannot be deleted.

Navigate to IACUC Assistant > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.



The **Broadcast Notice** page displays any broadcasts previously set up/sent out. Note that the **Date Sent** column is blank for draft notices listed here.

My Workspaces

IACUC

Broadcast Notice

Back

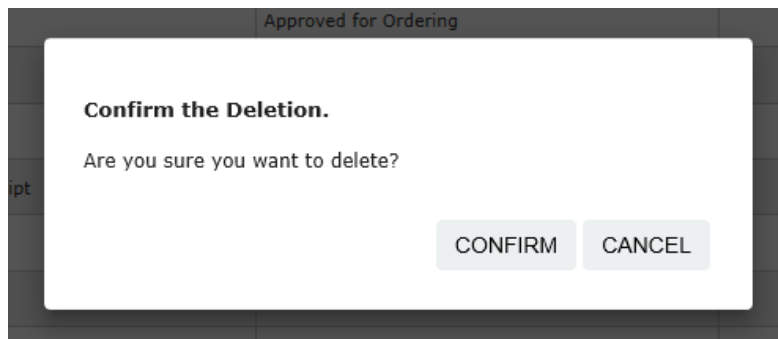
Add a New Notice

Delete Selected Notice

	Edit/View	Subject	Date Sent	Last Modified By
		Please Verify Contact Information	September 17, 2019	Administrator
		Please Confirm Office Mail Drop Code		Administrator

Select the checkbox at far left for the applicable notice and click the **Delete Selected Notice** button.

A confirmation popup window displays.



Click **CONFIRM** to delete the notice and return to the **Broadcast Notice** page.

Click **CANCEL** to return to the **Broadcast Notice** page without deleting the notice.

Setup Committee List

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

My Workspaces ▼
IACUC
Setup Committee List
Back

Add a Committee
Delete Selected Committee(s)

1 result(s) found...

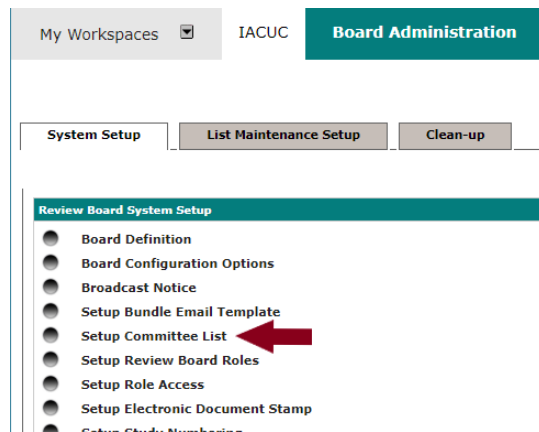
	Edit	Order	Committee Name
☐		0	BRCA Working Group

Where the property `rb.use_submission_by_committee` is set to “Yes” the review board is set up for Committee Submissions. In this configuration submissions are routed to individual committees instead of the review board. In addition, members of one committee are unable to access submissions sent to other committees.

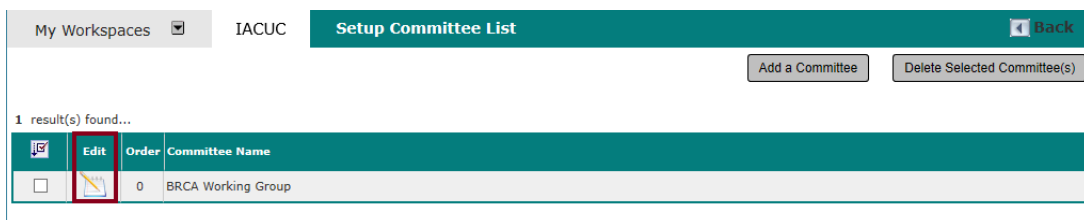
Where the property `rb.use_submission_by_committee` is set to “No” all submissions are routed to the review board submission queue, where they are processed and added to the appropriate committee meeting date. *Note that each committee has its own set of meeting dates.*

Edit Committee

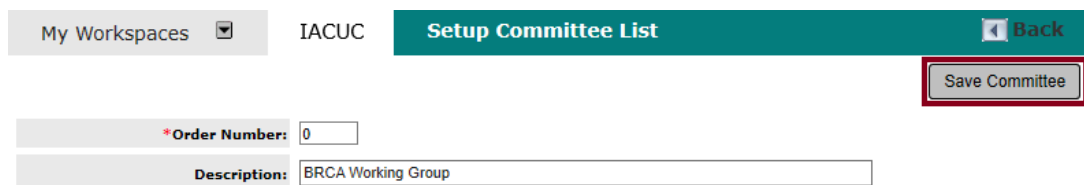
Navigate to IACUC Assistant > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



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



An edit panel opens.



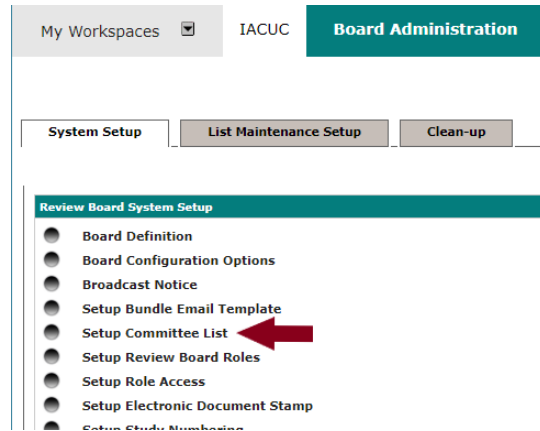
The **Order Number** defines routing priority order for the committee. Routing priority goes in ascending order, beginning with zero. If there is only one committee defined its **Order Number** will always be zero.

The **Description** is the committee name.

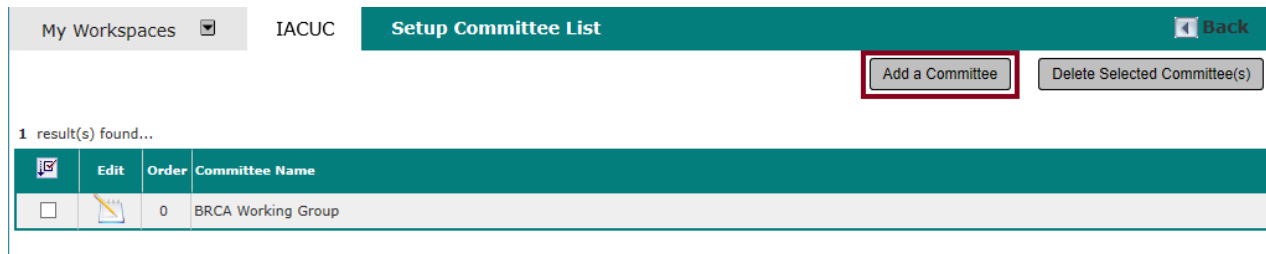
When changes are complete click the **Save Committee** button to save changes and close the edit panel.

Add Committee

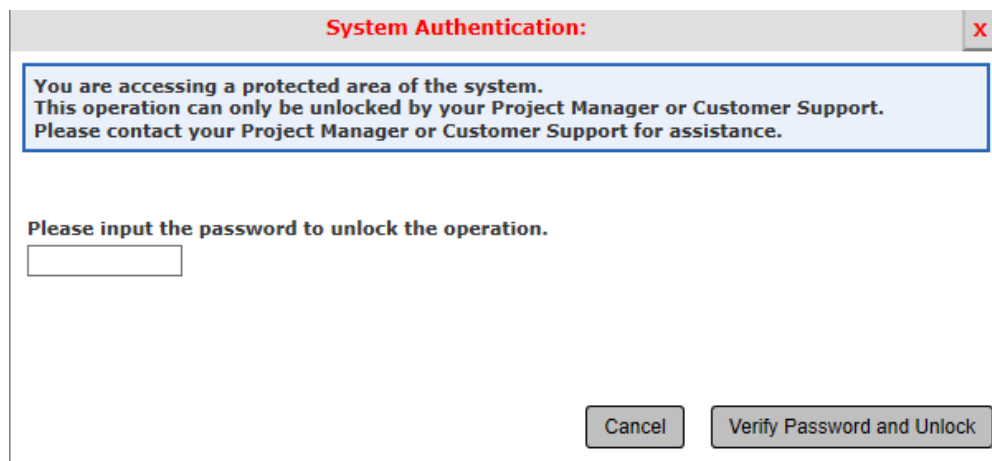
Navigate to IACUC Assistant > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



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



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



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

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

My Workspaces	IACUC	Setup Committee List	Back
Add a Committee			
Delete Selected Committee(s)			
2 result(s) found...			
☐	Edit	Order	Committee Name
☐		0	BRCA Working Group
☐		1	Oversight Committee

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

IACUC Assistant	IACUC Assistant Workspace
SRB Assistant	Select the Committee
IBC Assistant	Add a new Study
Conflict of Interest Assistant	Find a Study

Delete Committee

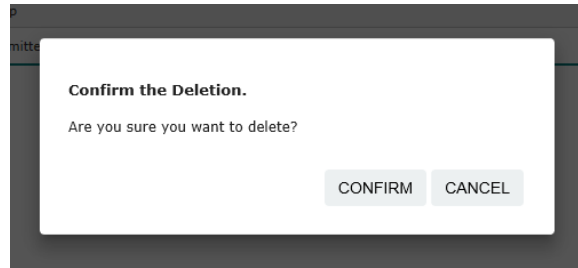
Navigate to IACUC Assistant > Review Board Administration > System Setup tab and click the **Setup Committee List** link.

My Workspaces	IACUC	Board Administration
System Setup	List Maintenance Setup	Clean-up
Review Board System Setup		
- Board Definition - Board Configuration Options - Broadcast Notice - Setup Bundle Email Template - Setup Committee List - Setup Review Board Roles - Setup Role Access - Setup Electronic Document Stamp - Setup Study Numbering		

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

My Workspaces	IACUC	Setup Committee List	Back
Add a Committee			
Delete Selected Committee(s)			
2 result(s) found...			
☐	Edit	Order	Committee Name
☐		0	BRCA Working Group
☒		1	Oversight Committee

A confirmation popup displays.



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

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

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

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

Setup Review Board Roles

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

My Workspaces

IACUC

Setup Roles List

Add a New Board Role

Filter By In Use: ☒ Yes ☐ No

Find

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

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

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

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

- **Delete:** where it is possible to delete a role, click the icon in this column to delete a role record; note that the icon does not appear for roles that cannot be deleted
- **Edit:** click the icon in this column to open a role record for editing
- **Order:** priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number
- **Role Name:** name assigned to the role; note that role names can be modified by the institution
- **Reserved:** a “Yes” in this column indicates the role is **Reserved** and cannot be deleted; a “No” here indicates the role is not **Reserved** and *can* be deleted, provided it is not currently in use (see next item, below)
- **In-Use:** a “Yes” in this column indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a “No” here indicates the role is not currently in use and can be deleted
- **Allow Alternate:** a “Yes” in this column indicates an alternate person who is included in the Alternate For list under IACUC Assistant > User Management > Grant User Access & Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable; a “No” here indicates no alternate can be specified for the role
- **Include on Agenda:** a “Yes” in this column indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to “No” users assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting
- **Include in Correspondence:** a “Yes” in this column indicates persons assigned to this role is/are to be included on the correspondence routing list; a “No” here indicates persons assigned to this role is/are not included on the correspondence routing list

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

My Workspaces IACUC **Setup Roles List** Back

Filter By In Use: ☒ Yes ☐ No

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

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

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

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

My Workspaces IACUC **Setup Roles List** Back

Filter By In Use: ☐ Yes ☒ No

1 result(s) found...

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

Edit Board Role

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

My Workspaces IACUC **Board Administration**

System Setup **List Maintenance Setup** Clean-up

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Setup Bundle Email Template
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Electronic Document Stamp
- Setup Study Numbering

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

My Workspaces

IACUC

Setup Roles List

Back

Filter By In Use: ☒ Yes ☐ No

Find

Add a New Board Role

11 result(s) found...

1 - 10

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

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

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

My Workspaces 

IACUC

Setup Roles List

 Back

Add a New Board Role

Filter By In Use: ☒ Yes ☐ No

Find

11 result(s) found...

1 - 10 

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

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

My Workspaces IACUC **Setup Roles List** Back

Back To List Save

Edit a Board Role.

*Order Number:

*In Use: ☒ Yes ☐ No

*Role Name:

*Allow Alternate for Meetings: ☒ Yes ☐ No

*Include in Minutes and Agenda?: ☒ Yes ☐ No

*Include in Correspondence?: ☒ Yes ☐ No

- **Order Number:** priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number
- **In-Use:** a selection of “Yes” indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a selection of “No” here indicates the role is not currently in use and can be deleted
- **Role Name:** name assigned to the role; note that role names can be modified by the institution
- **Allow Alternate for Meetings:** a selection of “Yes” indicates an alternate person who is included in the **Alternate Member For** list under IACUC Assistant > User Management > Grant User Access & Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable, as shown below; a “No” here indicates no alternate can be specified for the role

My Workspaces IACUC **Grant User Access & Define Roles** Back

Save Member Info

Name: Albo, Michael, B.S. Highest Degree Earned: B.S. Gender: --none-- Specialty: Add Remove Relationship to the Institution: ☒ Affiliated ☐ Non-Affiliated Affiliations: Add Remove Representational Capacity: ☒ Scientist ☐ Non-Scientist Representative of Specific Entity: Add Remove Address: 34 Primary Number: Cell Number: Pager Number: Fax Number:	☐ Grant IACUC Administrative rights ☐ Grant IACUC Junior Administrative rights <table border="1"> <thead> <tr> <th>Committee Access</th> <th>Committee Name</th> <th>Voting Member</th> </tr> </thead> <tbody> <tr> <td>☒</td> <td>Committee A</td> <td>☒</td> </tr> </tbody> </table> Roles <table border="1"> <tbody> <tr> <td>☐ Voting Board Member</td> <td>☐ Expediting Board Member</td> </tr> <tr> <td>☒ Coordinator</td> <td>☐ Administrative Assistant</td> </tr> <tr> <td>☐ Chairperson</td> <td>☐ Ex-Officio Member</td> </tr> <tr> <td>☐ Data Entry Member</td> <td>☐ Consultant/Ad Hoc Reviewer</td> </tr> <tr> <td>☐ Non-Voting Member</td> <td>☐ SDVA - Vet</td> </tr> <tr> <td>☐ Vice-Chairperson</td> <td>☐ Test Role</td> </tr> <tr> <td colspan="2"> ☒ Alternate Member For: ☐ Chong, Abby, Ph.D. ☐ Member, Board ☐ Yu, AlexRB </td> </tr> </tbody> </table>	Committee Access	Committee Name	Voting Member	☒	Committee A	☒	☐ Voting Board Member	☐ Expediting Board Member	☒ Coordinator	☐ Administrative Assistant	☐ Chairperson	☐ Ex-Officio Member	☐ Data Entry Member	☐ Consultant/Ad Hoc Reviewer	☐ Non-Voting Member	☐ SDVA - Vet	☐ Vice-Chairperson	☐ Test Role	☒ Alternate Member For: ☐ Chong, Abby, Ph.D. ☐ Member, Board ☐ Yu, AlexRB	
Committee Access	Committee Name	Voting Member																			
☒	Committee A	☒																			
☐ Voting Board Member	☐ Expediting Board Member																				
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☐ Vice-Chairperson	☐ Test Role																				
☒ Alternate Member For: ☐ Chong, Abby, Ph.D. ☐ Member, Board ☐ Yu, AlexRB																					

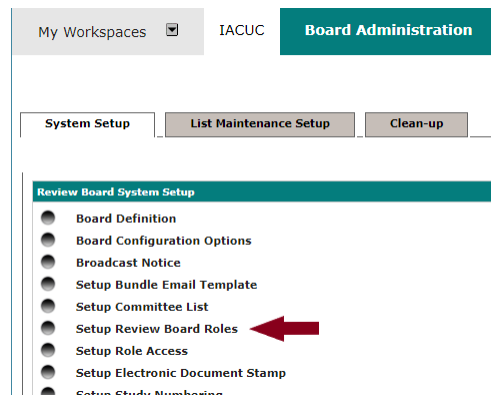
- **Include in Minutes and Agenda?:** a selection of “Yes” indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to “No” users assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting

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

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

Add Board Role

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



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

My Workspaces		IACUC	Setup Roles List						Back
									Add a New Board Role
Filter By In Use:		☒ Yes ☐ No	Find						
11 result(s) found...									1 - 10
Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence	
		1	Board Member	Yes	Yes	Yes	Yes	Yes	
		2	Coordinator	Yes	Yes	No	Yes	Yes	
		3	Chairperson	Yes	Yes	Yes	Yes	Yes	
		4	Data Entry Member	Yes	Yes	No	Yes	Yes	
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes	
		6	Alternate Member	Yes	Yes	No	Yes	Yes	
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes	
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes	
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes	
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes	

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

The screenshot shows the 'Setup Roles List' interface. At the top, there's a header with 'My Workspaces' and 'IACUC'. Below this is a teal bar with 'Setup Roles List' and a 'Back' button. A red box highlights the 'Back To List' and 'Save' buttons. The main form is titled 'Add a Board Role.' and contains the following fields:

- *Order Number:** A text input field containing the value '12'.
- *In Use:** Radio buttons for 'Yes' (selected) and 'No'.
- *Role Name:** A text input field.
- *Allow Alternate for Meetings:** Radio buttons for 'Yes' and 'No' (selected).
- *Include in Minutes and Agenda?:** Radio buttons for 'Yes' (selected) and 'No'.
- *Include in Correspondence?:** Radio buttons for 'Yes' (selected) and 'No'.

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

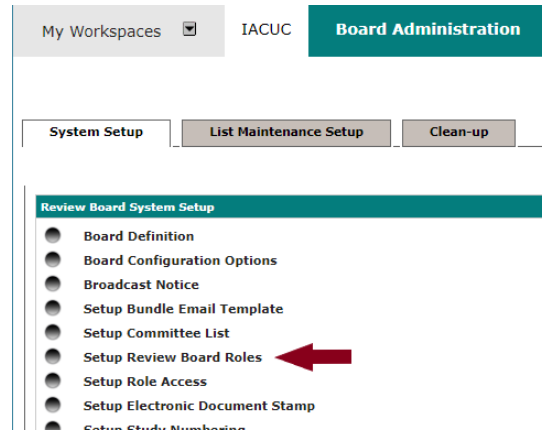
Enter the desired **Role Name** and edit other items as desired.

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

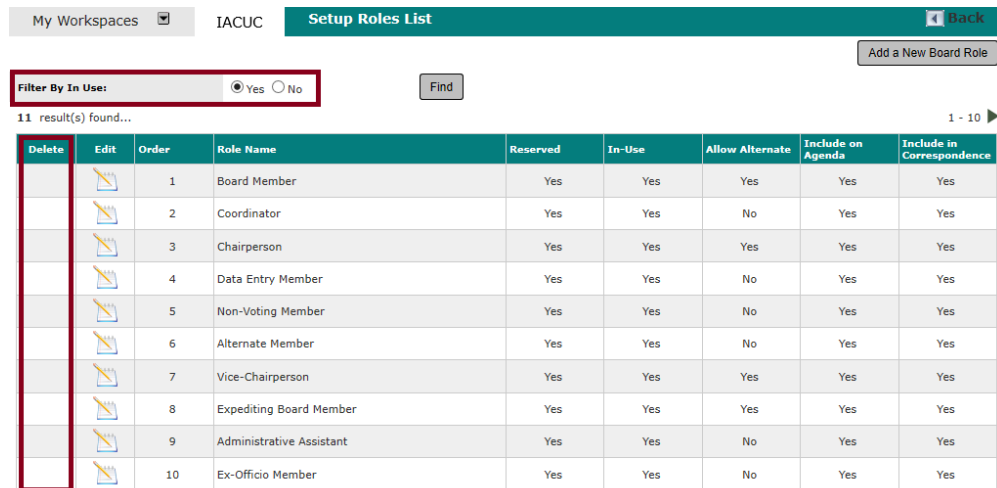
Click the **Save** button to save changes and return to the **Setup Roles List** page. Click the **Back To List** button to return to the **Setup Roles List** page without saving changes.

Delete Board Role

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

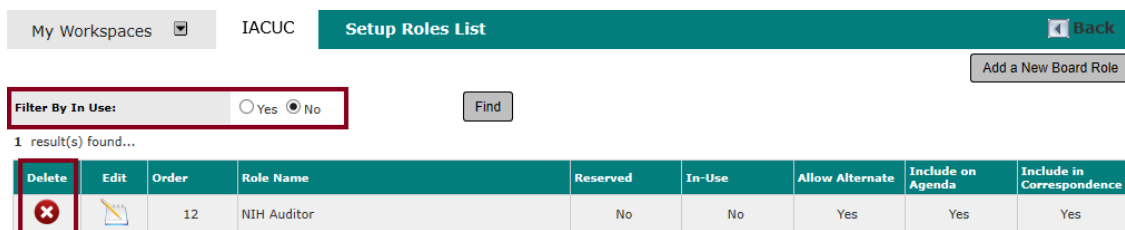


The **Setup Roles List** page is opened.

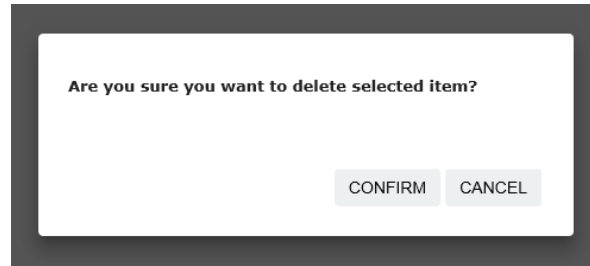


Because **Reserved** roles and in-use roles cannot be deleted, there are no icons in the **Delete** column for those roles on the **Setup Roles List** page.

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



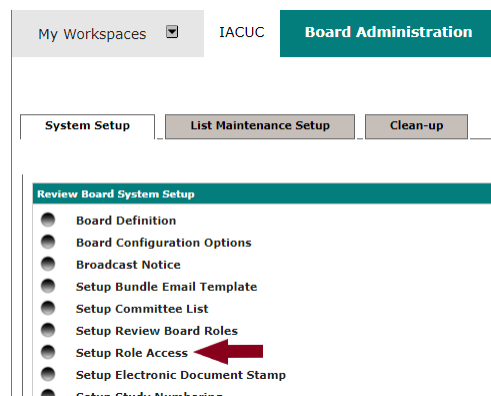
A confirmation popup window appears. Click **CANCEL** to return to the **Setup Roles List** page without saving changes. Click **CONFIRM** to delete the role and return to the **Setup Roles List** page.



Setup Role Access

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

Navigate to IACUC Assistant > Review Board Administration > System Setup tab and click the **Setup Role Access** link.



The **Setup Role Access** page is opened.

My Workspaces		IACUC		Setup Role Access																				Back	
																								Save Changes	
Screen Name		Board Member		Coordinator		Chairperson		Data Entry Member		Non-Voting Member		Alternate Member		Vice-Chairperson		Expedient Board Member		Administrative Assistant		Ex-Officio Member		Consultant/Ad Hoc Reviewer			
	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write	
Review Board Assistant	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
Submissions Not Assigned	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Submissions Assigned	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Submissions Completed	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Submissions Agenda	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Submission General Tab	☒	☒	☒	☒	☒	☒	☒	☒	☐	☒	☐	☐	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	
Submission Preview Screening Tab	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	
Submission Correspondence Tab	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	
Submission Review Summary Tab	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	
Submission Vote/Ack Tab	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	
Submission Outcome Tab	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	
Meeting Agenda	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Find Study	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	
Meeting Manager	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Meeting Manager Set-up Availability	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Meeting Manager Set-up Schedule	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Reviewer Assignments	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Outcome Letter Sign-off	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Outstanding Response Due	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
Correspondence	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
User Training	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	

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

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

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

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

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

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

My Workspaces ▾

IACUC

Setup Role Access

Screen Name			Board Member		Coordinator	
	Read	Write	Read	Write	Read	Write
Review Board Assistant	☒	☒	☒	☒	☒	☒
Submissions Not Assigned	☒	☒	☒	☒	☒	☒
Submissions Assigned	☒	☒	☒	☒	☒	☒
Submissions Completed	☒	☒	☒	☒	☒	☒
Submissions Agenda	☒	☒	☒	☒	☒	☒
Submission General Tab	☒	☒	☒	☒	☒	☒
Submission Preview Screening Tab	☒	☒	☒	☒	☒	☒
Submission Correspondence Tab	☒	☒	☒	☒	☒	☒
Submission Review Summary Tab	☒	☒	☒	☒	☒	☒
	—	—	—	—	—	—

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

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

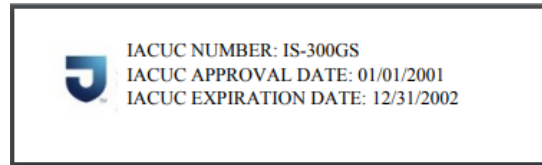
Where both checkboxes are selected for a given page, the system administrator can assign **Read** and **Write** access per role using the checkboxes in the columns at the right.

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

Note: The page may take a few moments to save; wait for the page to finish loading before navigating away.

Setup Electronic Document Stamp

The electronic document stamp applies pre-configured IACUC review board outcome details, such as in the example shown below, to documents in a pre-designated location.

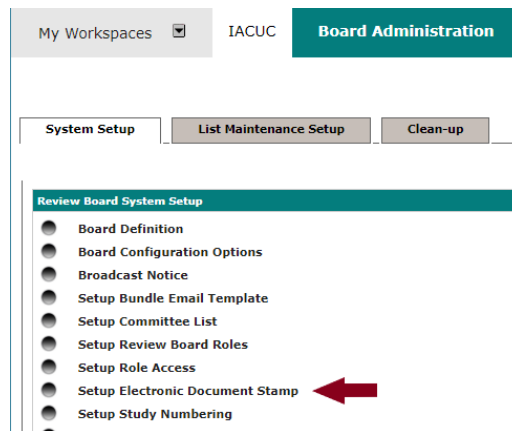


Electronic document stamps are configured on the **Setup Document Stamp** page, shown below.

My Workspaces		IACUC Setup Document Stamp		
		Add a New Stamp Delete Stamp(s)		
	Edit	Title	Type	Document Category
☐		Denied	General Purpose	N/A
☐		Approved	General Purpose	N/A

Add Electronic Document Stamp

Navigate to IACUC Assistant > Review Board Administration > System Setup tab and click the **Setup Electronic Document Stamp** link.



The **Setup Document Stamp** page opens.

My Workspaces		IACUC Setup Document Stamp		
		Add a New Stamp Delete Stamp(s)		
	Edit	Title	Type	Document Category
☐		Denied	General Purpose	N/A
☐		Approved	General Purpose	N/A

Click the **Add a New Stamp** button. An add panel opens for creation of the new stamp, as shown below.

Notice that some of the fields in the add panel contain default values. Complete the add panel fields as follows.

Title — enter the desired title of the stamp as it will appear in the list on the main **Setup Document Stamp** page list

Type — click in the field to open a dropdown picklist of options, then click on the desired option to select it: General Purpose (used for all documents, including consent and other study documents), Informed Consent (used only on consent forms), and Study Document (used only for other study documents); when Study Document is selected a **Category** dropdown list field appears for selection of the specific document type, as shown below

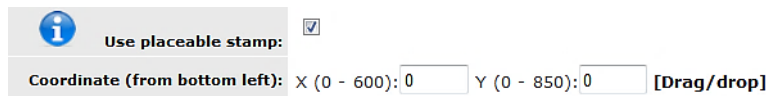
Note that the study document **Category** list is configured under My Workspaces > System Administration > List Configuration and Maintenance > Site List Setup tab > Study Document Category.

Also note that “Consent form” is not generally included as an option for IACUC, as IACUC studies do not involve human subjects, but that type can be included in the configuration list at institutions where animal owners are required to provide consent for the use of their animals in research.

Comments — add any desired comments, such as a description of the stamp type

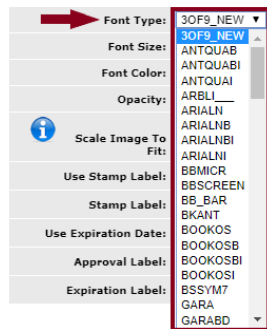
Show Stamp On —select “Last Page Only” to display the stamp only on the last page, or leave the default value of “All Pages” selected to display the stamp on all pages

Use placeable stamp — select this box to unlock the **Coordinate (from bottom left)** fields, shown below, which allow for exact placement on the document page; enter the desired X/Y coordinates to specify where the stamp should appear relative to the bottom left corner of the document page



Stamp Position On Page — use this field as an alternative to the **Use placeable stamp** option for stamp placement on the page; click to select “Top Left”, “Top Center”, “Top Right”, “Bottom Left”, “Bottom Center” or “Bottom Right”

Font Type — click in the field to open a dropdown list of available font options, then click the desired list item to select it



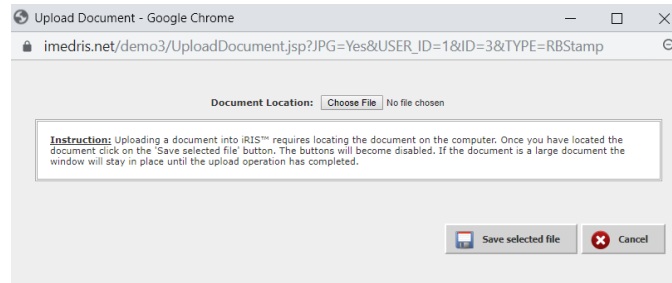
Font Size — click in the field to open a dropdown list of available font size options, then click the desired list item to select it

Font Color — click in the field to open a dropdown list of available font colors, then click the desired list item to select it

Opacity — enter an opacity value between .01 and 1.0, where 1.0 indicates 100% opaque, to set the relative transparency of the stamp

Scale Image to Fit — select this checkbox to automatically scale any uploaded images to fit within the stamp

Click the **Upload** button. An upload dialog box opens, as shown below.



Browse to the desired image file and select it, then click the **Save selected file** button to complete the upload. *Note that the image file must be in JPEG (.jpg, .jpeg) format.*

An example of the completed add panel is shown below.

Click the **Preview Stamp Layout** button to preview the stamp in a popup window.

Click the **Save Stamp Details** button to save the stamp after previewing it. As shown below, the stamp is added to the list on the Setup Document Stamp page.

My Workspaces ▾ IACUC **Setup Document Stamp** [Back](#)

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

	Edit	Title	Type	Document Category
☐		Approved Subject to NIH Review	General Purpose	N/A
☐		Denied	General Purpose	N/A
☐		Approved	General Purpose	N/A

Edit Electronic Document Stamp

Navigate to IACUC Assistant > Review Board Administration > System Setup tab and click the **Setup Electronic Document Stamp** link.

My Workspaces ▾ IACUC **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Setup Bundle Email Template
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Electronic Document Stamp
- Setup Study Numbering

The **Setup Document Stamp** page opens.

My Workspaces ▾ IACUC **Setup Document Stamp** [Back](#)

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

	Edit	Title	Type	Document Category
☐		Approved Subject to NIH Review	General Purpose	N/A
☐		Denied	General Purpose	N/A
☐		Approved	General Purpose	N/A

Click the icon in the **Edit** column for the applicable stamp. The stamp is opened in an edit panel, as shown below.

My Workspaces IACUC **Setup Document Stamp** Back

Title:

Type:

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:

Font Size:

Font Color:

Opacity:

Scale Image To Fit: ☒ Scale To Fit

Use Stamp Label: ☒ Yes ☐ No

Stamp Label:

Use Expiration Date: ☒ Yes ☐ No

Approval Label:

Expiration Label:

Preview Stamp Layout **Save Stamp Details**

Image file must be in .jpg format.

Image has been uploaded.



Make desired changes to the stamp fields, described below.

Title — enter the desired title of the stamp as it will appear in the list on the main **Setup Document Stamp** page list

Type — click in the field to open a dropdown picklist of options, then click on the desired option to select it: General Purpose (used for all documents, including consent and other study documents), Informed Consent (used only on consent forms), and Study Document (used only for other study documents); when Study Document is selected a **Category** dropdown list field appears for selection of the specific document type, as shown below

Type: **Category:**

Comments:

Show Stamp On: ☐ Last Page Only ☒ All Pages

Use placeable stamp: ☐

Category dropdown options:

- none--
- none--
- Flyer
- Investigator brochure
- Other
- Protocol
- Questionnaire
- Survey

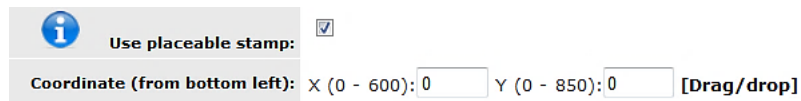
Note that the study document **Category** list is configured under *My Workspaces > System Administration > List Configuration and Maintenance > Site List Setup tab > Study Document Category*.

Also note that “Consent form” is not generally included as an option for IACUC, as IACUC studies do not involve human subjects, but that type can be included in the configuration list at institutions where animal owners are required to provide consent for the use of their animals in research.

Comments — add any desired comments, such as a description of the stamp type

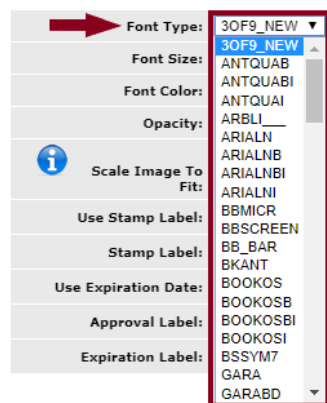
Show Stamp On —select “Last Page Only” to display the stamp only on the last page, or leave the default value of “All Pages” selected to display the stamp on all pages

Use placeable stamp — select this box to unlock the **Coordinate (from bottom left)** fields, shown below, which allow for exact placement on the document page; enter the desired X/Y coordinates to specify where the stamp should appear relative to the bottom left corner of the document page



Stamp Position On Page — use this field as an alternative to the **Use placeable stamp** option for stamp placement on the page; click to select “Top Left”, “Top Center”, “Top Right”, “Bottom Left”, “Bottom Center” or “Bottom Right”

Font Type — click in the field to open a dropdown list of available font options, then click the desired list item to select it



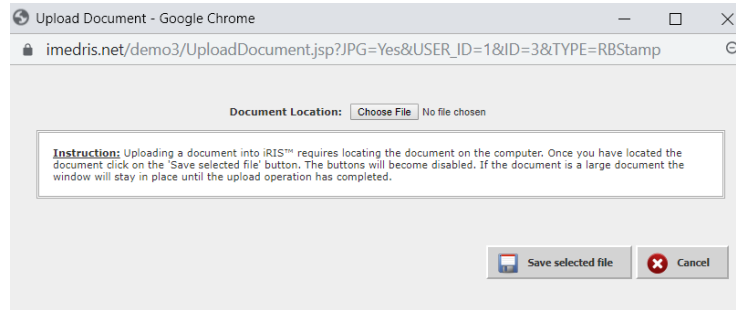
Font Size — click in the field to open a dropdown list of available font size options, then click the desired list item to select it

Font Color — click in the field to open a dropdown list of available font colors, then click the desired list item to select it

Opacity — enter an opacity value between .01 and 1.0, where 1.0 indicates 100% opaque, to set the relative transparency of the stamp

Scale Image to Fit — select this checkbox to automatically scale any uploaded images to fit within the stamp

Click the **Upload** button. An upload dialog box opens, as shown below.



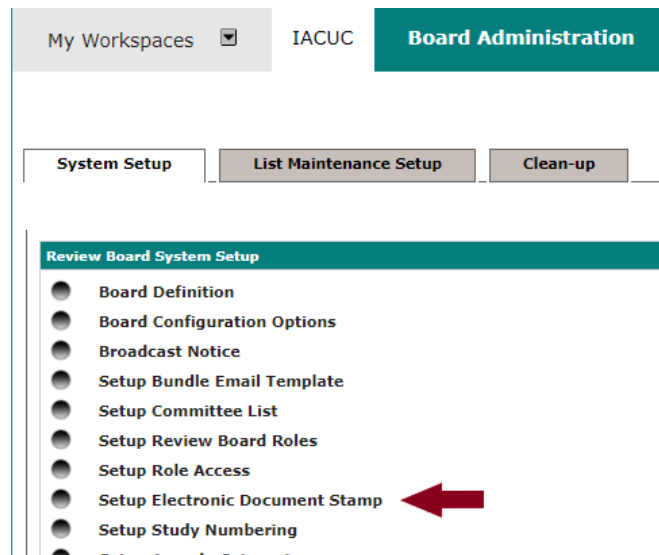
Browse to the desired image file and select it, then click the **Save selected file** button to complete the upload. *Note that the image file must be in JPEG (.jpg, .jpeg) format.*

Click the **Preview Stamp Layout** button to preview the stamp in a popup window.

Click the **Save Stamp Details** button to save the stamp after previewing it.

Delete Electronic Document Stamp

Navigate to IACUC Assistant > Review Board Administration > System Setup tab and click the **Setup Electronic Document Stamp** link.



The **Setup Document Stamp** page opens.

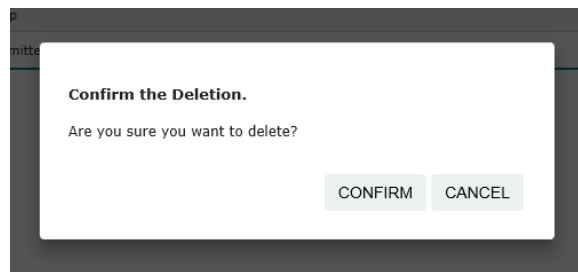
My Workspaces IACUC **Setup Document Stamp** Back

Add a New Stamp **Delete Stamp(s)**

	Edit	Title	Type	Document Category
☐		Approved Subject to NIH Review	General Purpose	N/A
☐		Denied	General Purpose	N/A
☐		Approved	General Purpose	N/A

Select the checkbox(es) in the far-left column for the stamp(s) to be deleted and click the **Delete Stamp(s)** button.

A confirmation popup displays.



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

Click the **CONFIRM** button to confirm the deletion and return to the **Setup Document Stamp** page. The stamp is deleted.

My Workspaces IACUC **Setup Document Stamp** Back

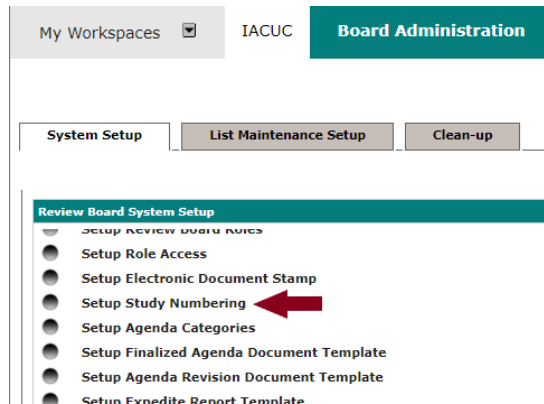
Add a New Stamp **Delete Stamp(s)**

	Edit	Title	Type	Document Category
☐		Denied	General Purpose	N/A
☐		Approved	General Purpose	N/A

Setup Study Numbering

The iRIS™ system includes the option to generate and automatically assign pre-configured IACUC study numbers.

Navigate to IACUC Assistant > System Configuration and click the **Setup Study Numbering** link.



The **Setup Board Auto Generated Numbering** page opens.

My Workspaces IACUC **Setup Board Auto Generated Numbering** [Back](#)

[Save Numbering](#)

Use Sequence for IACUC Number: ☒ Yes ☐ No

Use in Number	Description of Number Part	Number Part Information	Separator
☒	Constant Prefix	IACUC	-
☐	School Code		
☒	Calendar Year	☒ All 4 digits ☐ Last 2 digits	-
☒	System Generated Number	89 ☒ Zero Pad the Sequence Number Number of Digits: 3	

Select “Yes” for **Use Sequence for IACUC Number** to enable autogenerated IACUC study numbering.

As demonstrated in the **Description of Number Part** column, the number can be configured to include a **Constant Prefix**, **School Code**, **Calendar Year** and **System Generated Number**. Selecting the checkbox in the **Use in Number** column includes all items in that row in the numbering scheme.

Options to pad the **System Generated Number** with leading zeroes, set a fixed digit count for numbers to be generated, and insert an optional **Separator** character are also available.

In the screenshot shown above a numbering scheme that employs all options except **School Code** is configured.

The **Constant Prefix** is “IACUC”.

The first **Separator** character is “-”.

The **School Code** option is not selected, indicating that no **School Code** is included in the number.

The **All 4 digits** of the current **Calendar Year** are “20”.

The second **Separator** character is “-”.

The first sequence number to be used is “89”, the checkbox for **Zero Pad the Sequence Number** is selected and **Number of Digits** is set to “3”.

The first wean number generated by this scheme would be:

IACUC-2020-089

Click the **Save Numbering** button to save the numbering scheme.

Setup Outcome Letter Groups

The **Setup Board Letter Templates** page is accessed via IACUC Assistant > Review Board Administration > System Setup > Setup Outcome Letter Groups link. As shown below, the **Letter Types** dropdown picklist on the add/edit panel of the page includes two default letter group entries:

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

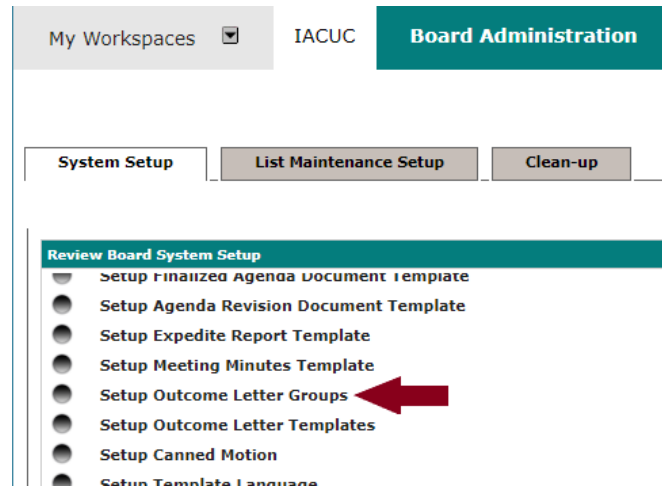
The iRIS™ system allows for collecting sets of review board forms into additional, custom configured **Letter Type** groups for assignment to different board review types.

Custom configured **Letter Type** groups are added to the **Letter Type** dropdown list on the **Setup Board Letter Templates** page shown in the screenshot above, and are optionally made available on the Outcome Letter tab of submission processing screens according to rules established at the time a **Letter Type** group is created or revised (see Add Outcome Letter Group and Edit Outcome Letter Group subsections of this manual, below).

Letter Type groups are configured on the **Setup Board Letter Group List** page, shown below.

Add Outcome Letter Group

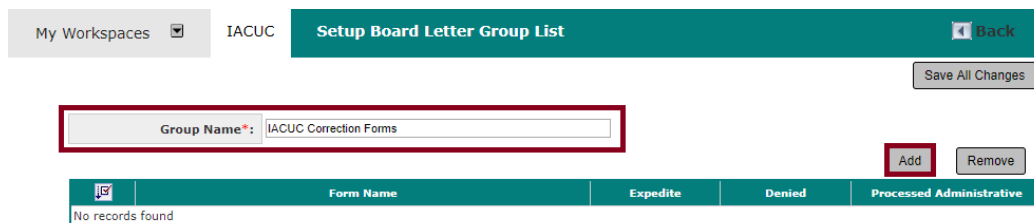
Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.



The **Setup Board Letter Group List** page opens. Click the **Add Group** button.



An add panel is opened for creation of the group. Enter the desired **Group Name**, as shown below, then click the **Add** button at right.



A popup opens for selection of review board forms to be included in the group. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

Form Name
☐ Arc Order Form
☐ ARC Submission Form
☐ Feasibility Form
☒ IACUC - Pre-Review Correction Form
☐ IACUC - Review Response Form
☐ IACUC 3 Year Renewal
☒ Review Response and Correction Form
☐ IACUC Protocol 3rd Year Renewal
☐ Initial Review Submission Form
☒ Study Amendment Form

Click the **Cancel** button to close the popup without adding any forms to the group.

Select the checkbox(es) in the far-left column for all forms to be included in the group, then click the **Select** button to add them to the group and close the popup. As shown below, the selected forms are added to the list of forms on the add panel.

My Workspaces ☒ IACUC **Setup Board Letter Group List** [Back](#) [Save All Changes](#)

Group Name*: IACUC Correction Forms [Add](#) [Remove](#)

Form Name	Expedite	Denied	Processed Administrative
☐ IACUC - Pre-Review Correction Form	☐	☐	☐
☐ Review Response and Correction Form	☐	☐	☐
☐ Study Amendment Form	☐	☐	☐

If any forms were selected from the popup list in error, select the checkbox(es) for any forms to be removed from the group and click the **Remove** button.

My Workspaces ☒ IACUC **Setup Board Letter Group List** [Back](#) [Save All Changes](#)

Group Name*: IACUC Correction Forms [Add](#) [Remove](#)

Form Name	Expedite	Denied	Processed Administrative
☐ IACUC - Pre-Review Correction Form	☐	☐	☐
☐ Review Response and Correction Form	☐	☐	☐
☐ Study Amendment Form	☐	☐	☐

Select or de-select the applicable checkboxes to make each form listed available/unavailable as part of the group according to board review type when the group is selected in the **Notification Letter** dropdown list in the Outcome Letter section of submission processing screens (shown below).

Outcome Letter i

Notification Letter: --none--

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

Note that all forms in the group are made available to the Full Board Review type by default.

An example of the fully configured group is shown in the screenshot below.

My Workspaces IACUC **Setup Board Letter Group List** Back

Save All Changes

Group Name*: IACUC Correction Forms

Add Remove

☐	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☒	☐	☒
☐	Review Response and Correction Form	☒	☐	☒
☐	Study Amendment Form	☒	☐	☒

Click the **Save All Changes** button to save the new group. As shown below, the group is added on the **Setup Board Letter Group List** page.

My Workspaces IACUC **Setup Board Letter Group List** Back

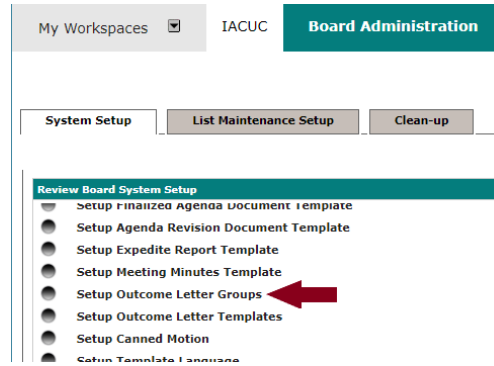
Add Group Delete Group(s)

☐	Edit	Group Name
☐		IACUC Correction Forms

The new **Letter Type** group is also added to the **Letter Type** dropdown list on the **Setup Board Letter Templates** page and is made available on the Outcome Letter tab of submission processing screens for the specified board review types.

Edit Outcome Letter Group

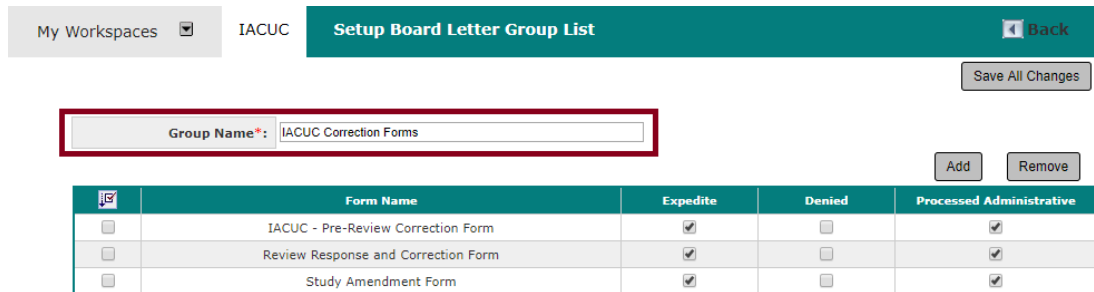
Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.



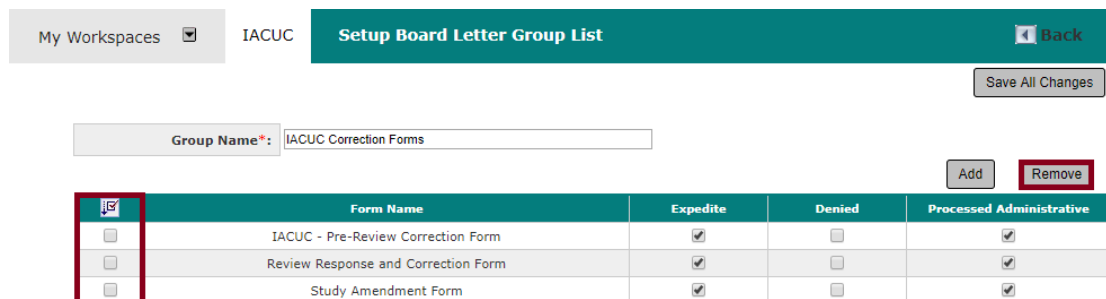
The **Setup Board Letter Group List** page opens. Click icon in the **Edit** column for the applicable group.



The group is opened for editing. Make any desired changes to the **Group Name**.



To remove forms from the group, select the applicable checkbox(es) in the far-left column and click the **Remove** button.



To add forms to the group, click the **Add** button.

My Workspaces ▾ IACUC **Setup Board Letter Group List** [Back](#)

[Save All Changes](#)

Group Name*: IACUC Correction Forms [Add](#) [Remove](#)

☒	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☒	☐	☒
☐	Review Response and Correction Form	☒	☐	☒
☐	Study Amendment Form	☒	☐	☒

A popup opens for selection of review board forms to be included in the group. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

Select Review Board Forms - Google Chrome

Not secure

[Select](#) [Cancel](#)

☒	Form Name
☐	Arc Order Form
☐	ARC Submission Form
☐	Feasibility Form
☒	IACUC - Pre-Review Correction Form
☐	IACUC - Review Response Form
☐	IACUC 3 Year Renewal
☒	Review Response and Correction Form
☐	IACUC Protocol 3rd Year Renewal
☐	Initial Review Submission Form
☒	Study Amendment Form

Click the **Cancel** button to close the popup without adding any forms to the group.

Select the checkbox(es) in the far-left column for all forms to be added the group, then click the **Select** button to add them to the group and close the popup.

Select or de-select the applicable checkboxes to make each form listed available/unavailable as part of the group according to board review type when the group is selected in the **Notification Letter** dropdown list in the Outcome Letter section of submission processing screens (shown below).

Outcome Letter ⓘ

Notification Letter: --none-- ▾

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

Note that all forms in the group are made available to the Full Board Review type by default.

In the example screenshot below, checkboxes for the **Expedite** board review type are de-selected. Applying this change means that the forms shown will not be included in the IACUC Correction Forms group when it is selected from the **Notification Letter** dropdown list (see screenshot above) for submissions assigned to the **Expedite** board review type.

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

My Workspaces IACUC **Setup Board Letter Group List** Back

Save All Changes

Group Name*: IACUC Correction Forms

Add Remove

	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☐	☐	☒
☐	Review Response and Correction Form	☐	☐	☒
☐	Study Amendment Form	☐	☐	☒

Delete Outcome Letter Group

Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.

My Workspaces IACUC **Board Administration**

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language

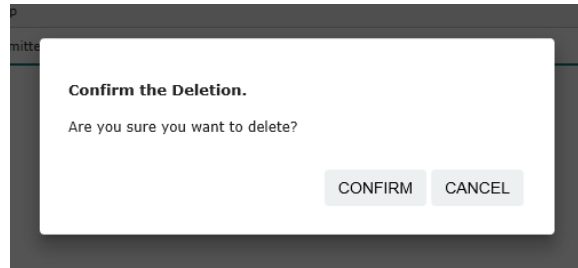
The **Setup Board Letter Group List** page opens. Select the checkbox(es) for the group(s) to be deleted and click the **Delete Group(s)** button.

My Workspaces IACUC **Setup Board Letter Group List** Back

Add Group **Delete Group(s)**

	Edit	Group Name
☐		IACUC Correction Forms

A confirmation popup displays.



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

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

Setup Agenda Categories

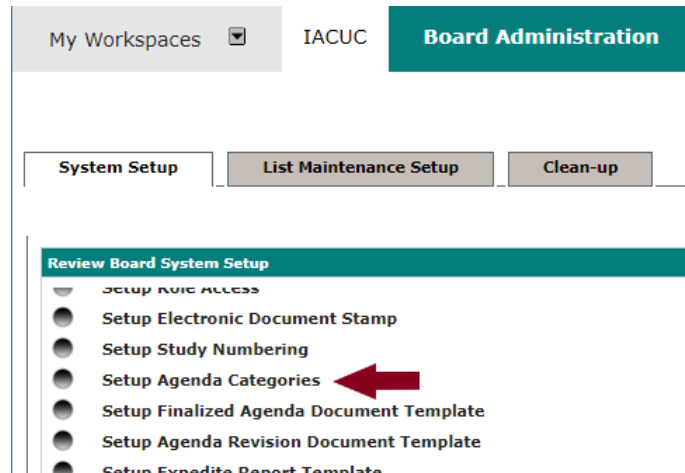
Where the property `rb.use_meeting` is set to "Yes" (accessed via IACUC Assistant > Review Board Administration > System Setup tab > Board Configuration Options > Submission Review Properties link), the iRIS™ system provides the ability to configure a list of agenda topic categories that are frequently addressed in review meetings, including the ability to attach relevant forms or documents where applicable.

The configured list appears on the Meeting Agenda page, as shown below.



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

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



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

My Workspaces		IACUC		Set-up Agenda Categories		Back
				Add Agenda Filter	Add Group	Delete Group(s)
☒	Edit	Group Name	Merge Code	Group Display Order		
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1		

Columns and controls on this page are:

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

- **Delete Group(s)** button: click this button to delete any agenda category selected in the far-left column

Agenda Filter

On the **Set-up Agenda Filter** page (shown below, accessed via the Add Agenda Filter button on the Set-up Agenda Categories page, see previous section of this manual), agenda filters are configured to group review document items. Once configured, agenda filters can be applied to include or exclude certain document types when assigning documents to agenda categories.

My Workspaces ▾

IACUC

Set-up Agenda Filter

Back

Add Filter

Delete Filter(s)

	Edit	Filter Type	Filter Name
☐		Previously Reviewed Filter	Previously Reviewed Filter

Columns and controls on this page are:

- **select**: far-left column, no header label; select the desired checkbox(es) here to select the corresponding record(s)
- **Edit**: click the icon in this column to open the corresponding filter for editing
- **Filter Type**: name of category / type of exclusion
- **Filter Name**: defaults to same value as **Filter Type**
- **Add Filter** button: click this button to open an add panel for creation of a new filter
- **Delete Filter(s)** button: click this button to delete any filter selected in the far-left column

Add Agenda Filter

Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.

My Workspaces ▾

IACUC

Set-up Agenda Categories

Back

Add Agenda Filter

Add Group

Delete Group(s)

	Edit	Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1

As shown below, the **Set-up Agenda Filter** page opens.

☒	Edit	Filter Type	Filter Name
☐		Previously Reviewed Filter	Previously Reviewed Filter

Click the **Add Filter** button. As shown below, an add panel is opened for creation of the new filter.

Validator Details

*Filter Type: --none--

*Filter Name:

Save All Changes

Click in the **Filter Type** field to open a dropdown picklist. Click the desired list item to select it.

Validator Details

*Filter Type: --none--

*Filter Name:

Filter Expedited

Filter Exempt

Filter Processed Administrative

Filter Previously Reviewed

Filter Conflict of Interest

Board Chair COI Filter

Filter User Defined

As shown below, in the case of any **Filter Type** selection other than “Filter User Defined” the **Filter Name** field automatically populates with text corresponding to the selected **Filter Type** and is set to read only.

See the Filter User Defined subsection of this manual for more information about configuring user defined filters.

Validator Details

*Filter Type: Filter Exempt

*Filter Name: Exempt Filter

Click the **Save All Changes** button to save the filter and close the add panel. As shown below, the filter is added to the list on the **Set-up Agenda Filter** page.

My Workspaces ▾ IACUC **Set-up Agenda Filter** [Back](#)

[Add Filter](#) [Delete Filter\(s\)](#)

	Edit	Filter Type	Filter Name
☐		Exempt Filter	Exempt Filter
☐		Previously Reviewed Filter	Previously Reviewed Filter

Edit Agenda Filter

Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.

My Workspaces ▾ IACUC **Set-up Agenda Categories** [Back](#)

[Add Agenda Filter](#) [Add Group](#) [Delete Group\(s\)](#)

	Edit	Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1

As shown below, the **Set-up Agenda Filter** page opens. Click the icon in the **Edit** column for the applicable filter.

My Workspaces ▾ IACUC **Set-up Agenda Filter** [Back](#)

[Add Filter](#) [Delete Filter\(s\)](#)

	Edit	Filter Type	Filter Name
☐		Exempt Filter	Exempt Filter
☐		Previously Reviewed Filter	Previously Reviewed Filter

As shown below, the record is opened in an edit panel. Click in the **Filter Type** field to expand the dropdown picklist and select the desired item.

My Workspaces ▾ IACUC **Set-up Agenda Filter** [Back](#)

[Save All Changes](#)

Validator Details

*Filter Type:

*Filter Name:

--none--

Filter Expedited

Filter Exempt

Filter Processed Administrative

Filter Previously Reviewed

Filter Conflict of Interest

Board Chair COI Filter

Filter User Defined

As shown below, in the case of any **Filter Type** selection other than “Filter User Defined” the **Filter Name** field automatically populates with text corresponding to the selected **Filter Type** and is set to read only.

My Workspaces IACUC **Set-up Agenda Filter** Back

Save All Changes

Validator Details

*Filter Type:

*Filter Name:

See the Filter User Defined subsection of this manual for more information about configuring user defined filters.

Click the Save All Changes button to save changes and close the edit panel. As shown below, the filter is revised in the list on the **Set-up Agenda Filter** page.

My Workspaces IACUC **Set-up Agenda Filter** Back

		Filter Type	Filter Name
☐		Expedited Filter	Expedited Filter
☐		Previously Reviewed Filter	Previously Reviewed Filter

Delete Agenda Filter

Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.

My Workspaces IACUC **Set-up Agenda Categories** Back

Add Agenda Filter

		Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1

As shown below, the **Set-up Agenda Filter** page opens. Select the checkbox(es) in the far-left column for the filter(s) to be deleted, then click the **Delete Filter(s)** button.

My Workspaces IACUC **Set-up Agenda Filter** Back

Delete Filter(s)

		Filter Type	Filter Name
☒		Expedited Filter	Expedited Filter
☐		Previously Reviewed Filter	Previously Reviewed Filter

A confirmation popup window displays.

Confirm the Deletion.

Are you sure you want to delete?

CONFIRM
CANCEL

Click **CANCEL** to return to the **Set-up Agenda Filter** page without deleting the filter(s).

Click **CONFIRM** to delete the filter(s) and return to the **Set-up Agenda Filter** page. As shown below, the selected filter is removed.

My Workspaces ▼ IACUC
Set-up Agenda Filter
Back

Add Filter
Delete Filter(s)

	Edit	Filter Type	Filter Name
☐		Previously Reviewed Filter	Previously Reviewed Filter

Filter User Defined

Note that familiarity with Structured Query Language (SQL), as well as a thorough knowledge of iRIS™ application modules, associated tables, custom forms and fields are required to create user defined filters using this feature.

Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.

My Workspaces ▼ IACUC
Set-up Agenda Categories
Back

Add Agenda Filter
Add Group
Delete Group(s)

	Edit	Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1

As shown below, the **Set-up Agenda Filter** page opens.

My Workspaces ▼ IACUC
Set-up Agenda Filter
Back

Add Filter
Delete Filter(s)

	Edit	Filter Type	Filter Name
☐		Previously Reviewed Filter	Previously Reviewed Filter

Click the **Add Filter** button. As shown below, an add panel is opened for creation of the new filter.

Click in the **Filter Type** field to open a dropdown picklist. Click “Filter User Defined” to select it.

An add panel is opened for configuration of a custom filter query.

As shown in the screenshot above, the **What to Filter** field in the query builder form defaults to “Applic. Form all columns”, and the corresponding **Data Value** fields default to **What Application?** and **What Application Column?**

In the screenshot below the **What to Filter** dropdown is expanded, showing that a second selection of “Submission Form all columns” is available.

My Workspaces  IACUC **Set-up Agenda Filter**  Back

Add a new Clause Delete Clause Save All Changes

Validator Details

*Filter Type: Filter User Defined 

*Filter Name:

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

When “Submission Form all columns” is selected the **Data Value** fields update to reflect options applicable to the Submission Form.

My Workspaces  IACUC **Set-up Agenda Filter**  Back

Add a new Clause Delete Clause Save All Changes

Validator Details

*Filter Type: Filter User Defined 

*Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Submission Form all columns --none--  Value 	What Form? --none--  What Form Column ? --none-- 	--none-- 

The **What Form?** dropdown list is populated with the names of forms configured for the specific institution, and the **What Form Column?** dropdown list is populated with items specific to the selected form.

*Note that the overall process of creating a user defined filter is the same regardless of whether “Submission Form all columns” or “Applic. Form all columns” is selected under **What to Filter**. The user selects the desired submission / application form, then selects a specific field from that form to compare against in the query.*

With the default selection of “Applic. Form all columns” in place, the **What Application?** dropdown list populates with application types. Click an application type in the list to select it.

My Workspaces ▼ IACUC **Set-up Agenda Filter** [Back](#)

[Add a new Clause](#) [Delete Clause](#) [Save All Changes](#)

Validator Details

*Filter Type: Filter User Defined ▼

*Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Applic. Form all columns ▼	What Application? --none-- IACUC APPLICATION (ANIMALS) IACUC Data Values IBC APPLICATION (BIO-SAFETY) IRB Application PCH Research Request Proposal Form Proposal Form - Main Application	--none-- ▼

--none-- ▼

Value ▼

As shown below, the **What Application Column?** dropdown list automatically populates with sections and questions applicable to the selected application.

My Workspaces ▼ IACUC **Set-up Agenda Filter** [Back](#)

[Add a new Clause](#) [Delete Clause](#) [Save All Changes](#)

Validator Details

*Filter Type: Filter User Defined ▼

*Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Applic. Form all columns ▼	What Application? IACUC APPLICATION (ANIMALS) ▼	--none-- ▼

--none-- ▼

Value ▼

What Application Column ?

- none--
- _100_10_ADD_SPECIES
- _100_30_GRANT_PROPOSAL_YN
- _1000_10_GLOVES_SPECIFY_SL
- _1000_10_HAZARD_PROTECTION_OTHER_MS
- _1000_10_HAZARDOUS_PROTECTIVE_MATERIAL
- _1000_10_OTHER_SPECIFY_SL
- _1000_20_ANIMAL_CARETAKERS_MS
- _1000_20_GLOVES_SPECIFY_SL
- _1000_20_OTHER_SPECIFY_MS
- _1000_20_OTHER_SPECIFY_SL
- _1200_20_ANIMAL_HOUSING_MS
- _1200_20_EXTERNAL_HOUSING_SL
- _1200_30_ANIMAL_TREATMENT_MS
- _1200_30_OTHER_TREATMENT_SL
- _1200_50_OWNER_REQUEST_EUTHANASIA_MS
- _200_30_ANIMAL_CARE_EMAIL_SL
- _200_30_ANIMAL_CARE_EMERGENCY_PHONE_SL
- _200_30_ANIMAL_CARE_WORK_PHONE_SL
- _300_10_MASTER_LAY_SUMMARY
- _300_30_EXPERIMENTAL_DESIGN RTE
- _400_20_GENETIC_MODIFIED_YN
- _400_20_NON_RODENT_TRANSGENIC_YN
- _400_20_TRANSGENIC_ANIMAL_MS
- _400_30_ANIMAL_SOURCE_MS
- _400_30_OTHER_ANIMAL_SOURCE_SPECIFY_SL
- _400_40_ANIMAL_HOUSING_YN
- _400_50_VETERINARY_CARE_MS
- _400_60_ADOPTION_GUIDELINES_ML
- _400_60_ADOPTION_MS

Click the desired item in the **What Application Column?** dropdown list to select it. As shown below, the area beneath the **What Application Column?** field populates with options applicable to the selected column item.

My Workspaces ☒ IACUC **Set-up Agenda Filter** [Back](#)

[Add a new Clause](#) [Delete Clause](#) [Save All Changes](#)

Validator Details

*Filter Type: Filter User Defined
 *Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Applic. Form all columns	What Application? IACUC APPLICATION (ANIMALS) What Application Column ? _400_20_TRANSGENIC_ANIMAL_MS Which Option? 1 ☐ Yes ☐ No	--none--

--none--
Value

A thorough knowledge of iRIS™ data tables is required to understand the auto-populated options provided.

Make desired selections in the area beneath the **What Application Column?** field, then select the desired comparator and data type from the dropdown lists at the lower left of the panel.

My Workspaces ☒ IACUC **Set-up Agenda Filter** [Back](#)

[Add a new Clause](#) [Delete Clause](#) [Save All Changes](#)

Validator Details

*Filter Type: Filter User Defined
 *Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Applic. Form all columns	What Application? IACUC APPLICATION (ANIMALS) What Application Column ? _400_20_TRANSGENIC_ANIMAL_MS Which Option? 1 ☐ Yes ☒ No	--none--

--none--
Value

As shown below, the comparator dropdown contains all standard SQL query comparators. It is up to the user constructing the query to select a comparator type that is applicable to the selected Application Column value to the right of the comparator field.

My Workspaces ☒ IACUC **Set-up Agenda Filter** [Back](#)

[Add a new Clause](#) [Delete Clause](#) [Save All Changes](#)

Validator Details

*Filter Type: Filter User Defined
 *Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Applic. Form all columns	What Application? IACUC APPLICATION (ANIMALS) What Application Column ? _400_20_TRANSGENIC_ANIMAL_MS Which Option? 1 ☐ Yes ☒ No	--none--

--none--
 EQUAL
 NOT EQUAL
 LESS THAN
 LESS THAN EQUAL
 GREATER THAN
 GREATER THAN EQUAL

Comparators of “NOT EQUAL” or “EQUAL” can be used for comparisons against Yes/No and text fields. The remaining comparators are used for comparisons against numeric values.

In this example a comparator of “EQUAL” is selected because the Application Column value can only be “Yes” or “No”.

Note that the second comparator field defaults to “Value” but will dynamically update with other options where such options are applicable to Application Column and comparator selections.

My Workspaces ▼ IACUC Set-up Agenda Filter Back

Add a new Clause Delete Clause Save All Changes

Validator Details

*Filter Type: Filter User Defined

*Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Applic. Form all columns	What Application? IACUC APPLICATION (ANIMALS)	--none--
		What Application Column ? _400_20_TRANSGENIC_ANIMAL_MS Which Option? 1	

EQUAL

Value

Yes No

In the screenshot above the first clause of the user defined filter query is complete. This query returns IACUC applications where “No” is selected for option 1 of the question about whether transgenic animals are to be used in the study.

Note that when a configured filter is applied during creation of an Agenda Category, the user is prompted to choose whether to include or exclude records matching the filter’s criteria.

Click the **Add a new Clause** button to add another filter configuration panel to the page, adding another clause to the filter query.

My Workspaces ▼ IACUC Set-up Agenda Filter Back

Add a new Clause Delete Clause Save All Changes

Validator Details

*Filter Type: Filter User Defined

*Filter Name:

Order	What to Filter	Data Value	Join by, if any
☐ 1	Applic. Form all columns	What Application? IACUC APPLICATION (ANIMALS)	--none--
		What Application Column ? _400_20_TRANSGENIC_ANIMAL_MS Which Option? 1	AND OR

EQUAL

Value

Yes No

When the query includes two or more clauses the **Join by, if any** field is used to specify the join type and the **Order** field is used to specify the order in which each clause is to be evaluated when the query runs.

*SQL familiarity is required to correctly configure the **Order** and **Join by, if any** fields.*

After all desired clauses have been configured for the query, enter a **Filter Name** and click the **Save All Changes** button to save the filter.

The filter is added on the **Set-up Agenda Filter** page.

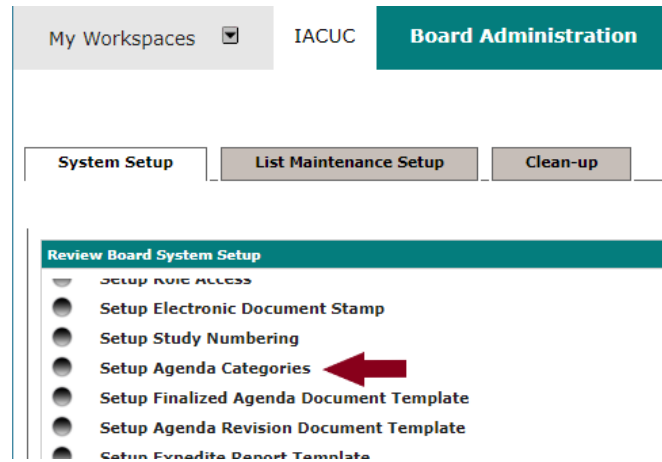
Filter Type	Filter Name
Previously Reviewed Filter	Previously Reviewed Filter
User Defined Filter	Include Transgenic Animals

Add Agenda Category

Where the property `rb.use_meeting` is set to "Yes" (accessed via IACUC Assistant > Review Board Administration > System Setup tab > Board Configuration Options > Submission Review Properties link), the iRIS™ system provides the ability to configure a list of agenda topic categories. The configured list appears on the Meeting Agenda page, as shown below.

- ☐ **Initial Reviews** - 0 Submissions
0 Items for review in this category.
- ☐ **Continuing Review** - 0 Submissions
0 Items for review in this category.
- ☐ **Modifications** - 0 Submissions
0 Items for review in this category.
- ☐ **Amendments** - 0 Submissions

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



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

My Workspaces 

IACUC

Set-up Agenda Categories

 Back

Add Agenda Filter

Add Group

Delete Group(s)

	Edit	Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1

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

My Workspaces

IACUC

Set-up Agenda Categories

Back

Save All Changes

Group Name*:

Group Order*:

Group Merge Code*:

Add

Remove

Form Name

No record found

Complete the top of the add panel as follows:

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

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

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

An example of the filled fields is shown below. Click the **Add** button to attach forms to this category, if applicable.

The **Select Review Board Forms** popup appears, populated with all available forms for selection. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

Click the **Cancel** button to close the popup without adding any forms to the category.

Select the checkbox(es) in the far-left column for forms to be attached to the category, then click the **Select** button.

The selected form(s) is(are) added to the category add panel, with options to apply previously configured filters for each form if desired. *All* previously configured filters are shown here.

See the *Agenda Filter* section of this manual for more information about filter configuration.

My Workspaces ▾ IACUC Set-up Agenda Categories Back

Save All Changes

Group Name*: Subject Animal Census Status

Group Order*: 2

Group Merge Code*: CENSUS_STATUS

Add Remove

Form Name	Expedited Filter	Previously Reviewed Filter	Include Transgenic Animals
☐ Arc Order Form	--none--	--none--	--none--
☐ External Transfer	--none--	--none--	--none--
☐ Internal Transfer Form	--none--	--none--	--none--

As shown in the screenshot above, select the checkbox(es) in the far-left column for any forms added to the category in error, then click the **Remove** button to remove the selected form(s).

In the screenshot below, the dropdown list containing options for application of the “Expedited Filter” on the “Arc Order Form” item is expanded. This dropdown list is the same for all filters.

My Workspaces ▾ IACUC Set-up Agenda Categories Back

Save All Changes

Group Name*: Subject Animal Census Status

Group Order*: 2

Group Merge Code*: CENSUS_STATUS

Add Remove

Form Name	Expedited Filter	Previously Reviewed Filter	Include Transgenic Animals
☐ Arc Order Form	--none-- No Match Required Include if this Type is found Not Included if this Type is found	--none--	--none--
☐ External Transfer	--none--	--none--	--none--
☐ Internal Transfer Form	--none--	--none--	--none--

Make all desired selections in the filter option dropdown lists, then click the **Save All Changes** button. Note that a selection is required in every dropdown list in order to save the category.

My Workspaces IACUC **Set-up Agenda Categories** Back

Group Name*: Subject Animal Census Status

Group Order*: 2

Group Merge Code*: ARC_CENSUS_STATUS

	Form Name
☐	Arc Order Form
	Expedited Filter Not Included if this Type is found
	Previously Reviewed Filter Not Included if this Type is found
	Include Transgenic Animals Not Included if this Type is found
☐	External Transfer
	Expedited Filter Not Included if this Type is found
	Previously Reviewed Filter Not Included if this Type is found
	Include Transgenic Animals Not Included if this Type is found
☐	Internal Transfer Form
	Expedited Filter Not Included if this Type is found
	Previously Reviewed Filter Not Included if this Type is found
	Include Transgenic Animals Not Included if this Type is found

The category is added on the **Set-up Agenda Categories** page.

My Workspaces IACUC **Set-up Agenda Categories** Back

	Edit	Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1
☐		Subject Animal Census Status	ARC_CENSUS_STATUS	2

Edit Agenda Category

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

My Workspaces IACUC **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

Review Board System Setup

- Setup Role Access
- Setup Electronic Document Stamp
- Setup Study Numbering
- Setup Agenda Categories**
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedited Report Template

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

My Workspaces IACUC **Set-up Agenda Categories** Back

Add Agenda Filter Add Group Delete Group(s)

	Edit	Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1
☐		Subject Animal Census Status	ARC_CENSUS_STATUS	2

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

My Workspaces IACUC **Set-up Agenda Categories** Back

Save All Changes

Group Name*:

Group Order*:

Group Merge Code*:

Add Remove

	Form Name		
☐	Arc Order Form		
	Expedited Filter		Not Included if this Type is found
	Previously Reviewed Filter		Not Included if this Type is found
	Include Transgenic Animals		Not Included if this Type is found
☐	External Transfer		
	Expedited Filter		Not Included if this Type is found
	Previously Reviewed Filter		Not Included if this Type is found
	Include Transgenic Animals		Not Included if this Type is found
☐	Internal Transfer Form		
	Expedited Filter		Not Included if this Type is found
	Previously Reviewed Filter		Not Included if this Type is found
	Include Transgenic Animals		Not Included if this Type is found

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

- **Group Name:** descriptive name for the category; recall that categories are used when creating a finalized agenda document template, so the name entered here should indicate the contents of the category
- **Group Order:** the entry in this field is shown in the Group Display Order column of the **Set-up Agenda Categories** page, and dictates the order in which this category appears in the finalized agenda document template
- **Group Merge Code:** enter the desired merge code to be used for inclusion of this category on forms and in document templates; *note that the code must include underscores where spaces occur between words, and special characters (e.g., &, #, etc.) are not allowed*

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

As shown in the screenshot below, select the checkbox(es) in the far-left column for any forms to be removed from the category, then click the **Remove** button to remove the selected form(s).

My Workspaces IACUC **Set-up Agenda Categories** Back

Save All Changes

Group Name*: Subject Animal Census Status

Group Order*: 2

Group Merge Code*: ARC_CENSUS_STATUS

Add Remove

	Form Name	
☐	Arc Order Form	
	Expedited Filter	Not Included if this Type is found
	Previously Reviewed Filter	Not Included if this Type is found
	Include Transgenic Animals	Not Included if this Type is found
☐	External Transfer	
	Expedited Filter	Not Included if this Type is found
	Previously Reviewed Filter	Not Included if this Type is found
	Include Transgenic Animals	Not Included if this Type is found
☐	Internal Transfer Form	
	Expedited Filter	Not Included if this Type is found
	Previously Reviewed Filter	Not Included if this Type is found
	Include Transgenic Animals	Not Included if this Type is found

Click the **Add** button to attach forms to this category, if applicable. The **Select Review Board Forms** popup appears, populated with all available forms for selection. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

Select Review Board Forms - Microsoft Edge

https://ich1.imedris.net/ID_Form_Access_Display?i=1575401820110

Select Cancel

	Form Name
☐	Arc Order Form
☐	External Transfer
☐	Internal Transfer Form
☐	Wean Request Form

Click the **Cancel** button to close the popup without adding any forms to the category.

Select the checkbox(es) in the far-left column for forms to be attached to the category, then click the **Select** button.

Any selected form(s) is(are) added to the category add panel, with options to apply previously configured filters for each form if desired. *All* previously configured filters are shown here.

See the Agenda Filter section of this manual for more information about filter configuration.

My Workspaces IACUC **Set-up Agenda Categories** Back

Save All Changes

Group Name*: Subject Animal Census Status

Group Order*: 2

Group Merge Code*: ARC_CENSUS_STATUS

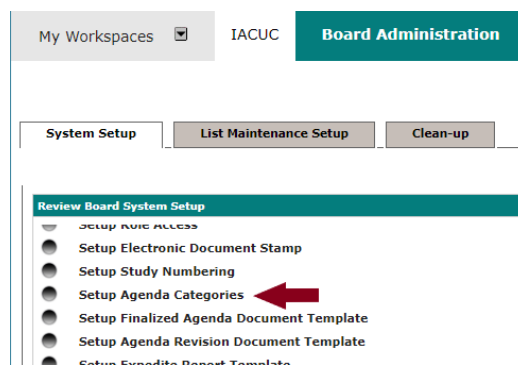
Add Remove

	Form Name	
☐	Arc Order Form	
	Expedited Filter	Not Included if this Type is found
	Previously Reviewed Filter	Not Included if this Type is found
	Include Transgenic Animals	Not Included if this Type is found
☐	External Transfer	
	Expedited Filter	Not Included if this Type is found
	Previously Reviewed Filter	Not Included if this Type is found
	Include Transgenic Animals	Not Included if this Type is found
☐	Internal Transfer Form	
	Expedited Filter	Not Included if this Type is found
	Previously Reviewed Filter	Not Included if this Type is found
	Include Transgenic Animals	Not Included if this Type is found

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

Delete Agenda Category

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



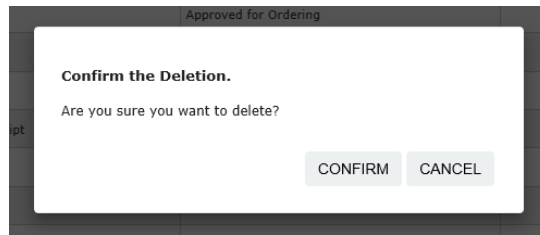
The **Set-up Agenda Categories** page opens, as shown below.

My Workspaces IACUC **Set-up Agenda Categories** Back

Add Agenda Filter Add Group **Delete Group(s)**

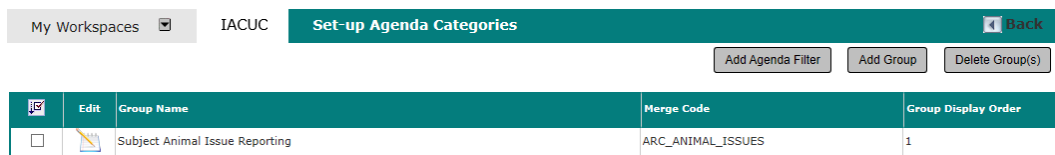
	Edit	Group Name	Merge Code	Group Display Order
☐		Subject Animal Issue Reporting	ARC_ANIMAL_ISSUES	1
☒		Subject Animal Census Status	ARC_CENSUS_STATUS	2

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



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

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



Document Templates

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

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

- **Template Definition:** a template containing standardized boilerplate text for the desired document or correspondence type (e.g., meeting agenda, meeting minutes, vendor email, outcome letter, etc.) is created and formatted in a rich text editor
- **Merge Code Addition:** where the document or correspondence type needs to include specific data pulled from the iRIS™ system (e.g., order number, review board name, vendor email address, quantity of animals ordered, etc.), the applicable Merge Code for each needed data item is added to the template
- **Document / Correspondence Generation:** when a template-based document / correspondence is generated by an iRIS™ user, the pre-formatted template serves as the default starting point for the document / correspondence; the user edits the document / correspondence as desired before printing or sending it

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

Using Merge Codes in Document Templates

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

Note that the example shown is taken from the Vivarium/ARC module, but the general process described is the same regardless of the module in use.

The screenshot shows the 'Vendor Email Template' editor in the Vivarium module. The title is 'Animal Return, Incorrect Sex Counts'. The content area contains a text editor with the following text: 'Dear ,', 'Our livestock order number | was received on . Unfortunately, the sex counts of these animals are incorrect. Our order was for females and males, but we received females and males.', 'We have sent the animals back and a new order was sent .', 'Please let us know if you need any more information regarding this order.', and '- ARC Coordinator'. A red arrow points to the 'Insert Merge Code' button in the top right corner of the content area.

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

Note that the list also includes sections for other modules, such as IRB and IACUC, to use in templates for documents applicable to those modules. See the Merge Code List subsection of this manual for more information.

The screenshot shows the 'Insert Data Merge Code' popup window. The window title is 'Insert Data Merge Code - Microsoft Edge'. The URL in the address bar is 'https://sb1.imedris.net/RB_Correspondence_Code_Dlg.jsp?s=1572384035235'. The main content area lists merge codes under the heading 'ARC Request Info'. The 'Order Number' merge code is selected. Other merge codes listed include 'Request - Order Date', 'Preferred Delivery Date', 'Preferred Vendor', 'Request - Stock Number/Code', 'Request - Age/Size', 'Request - Number of Males', 'Request - Number of Females', 'Request - Number of Cages', and 'Request - Approved Location'. At the bottom, there are 'OK' and 'Cancel' buttons.

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

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

The screenshot shows the 'Vendor Email Template' editor interface. At the top, there are tabs for 'My Workspaces' and 'Vivarium', and a 'Back' button. Below these are two buttons: 'Insert Merge Code' and 'Save Template'. The main editing area is divided into two sections: '*Title:' and '*Content:'. The '*Title:' field contains the text 'Animal Return, Incorrect Sex Counts'. The '*Content:' field contains a rich text editor with a toolbar. A red arrow points to the 'Insert Merge Code' button, which is highlighted in the original image. The text in the '*Content:' field is as follows:

Dear ,

Our livestock order number [%order_num%] was received on . Unfortunately, the sex counts of these animals are incorrect. Our order was for females and males, but we received females and males.

We have sent the animals back and a new order was sent .

Please let us know if you need any more information regarding this order.

- ARC Coordinator

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

The screenshot shows the 'Vendor Email Template' editor interface, similar to the previous one. The 'Insert Merge Code' button is now disabled, and the 'Save Template' button is highlighted with a red border. The text in the '*Content:' field is updated with merge codes:

Dear [%vendor_name%],

Our livestock order number [%order_num%] was received on [%recieved_date%]. Unfortunately, the sex counts of these animals are incorrect. Our order was for [%order_num_females%] females and [%order_num_males%] males, but we received [%receive_num_females%] females and [%receive_num_males%] males.

We have sent the animals back and a new order was sent [%order_order_date%].

Please let us know if you need any more information regarding this order.

- ARC Coordinator

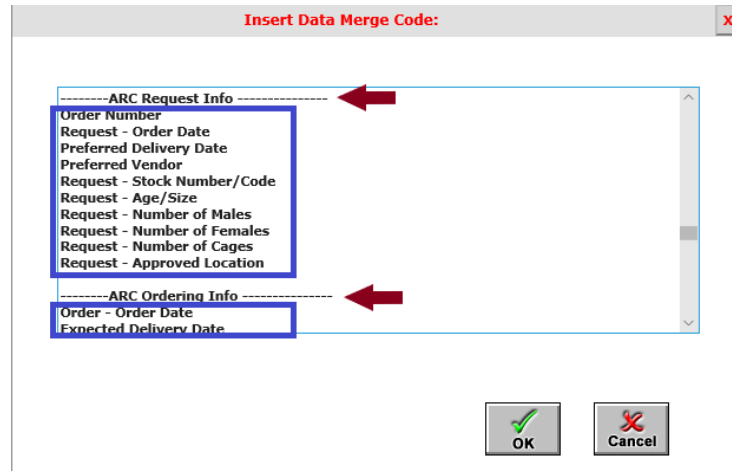
Click the **Save Template** button to save changes.

Merge Code List

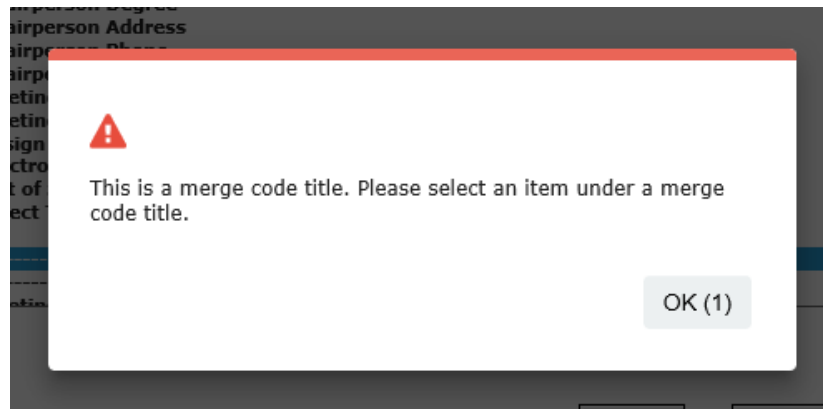
Depending on the user’s data access rights and the institution’s Review Board Administration settings, the Merge Code list can include system data from the following categories:

Review Board	Study Financial Information
Meetings	Submission Information
Multi-Site	ARC Request Information
Study Personnel	ARC Ordering Information
Study Contacts	ARC Receiving Information
Form Creator	ARC Cage Information
Department Reviewer and Signoff	Study/IRB/IACUC Application Information

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



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



Merge Codes Applicable to Animal Resource Center (ARC)

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

---ARC Request Info---	---ARC Ordering Info---	---ARC Receiving Info---	---ARC Cage Info---
Number of Females	Order - Order Date	Date Received	Cage Type
Number of Males	Expected Delivery Date	Purchase Cost	Bar Code
Age Size	Confirmation Number	Service Cost	Cage - Cage ID

---ARC Request Info ---	---ARC Ordering Info ---	---ARC Receiving Info ---	---ARC Cage Info ---
Species Name	Method of Ordering	Container OK	Cage - Species
Strain Name	Vendor Name	General Appearance	Cage - Strain
Order Number	Vendor Contact	Eyes, Ears, Nose, Mouth	Cage - Number of Males
Request - Order Date	Vendor Phone	Urogenital, Anus	Cage - Number of Females
Preferred Delivery Date	Vendor Fax	Respiratory	Cage - Number of Unknown Sex
Preferred Vendor	Vendor Email	Hydration	Cage - Cage Card Comments
Request - Stock Number/Code	Order - Species	Receive - Number of Males	Cage - List of Animal IDs
Request - Age/Size	Order - Strain	Receive - Number of Females	
Request - Number of Males	Order - Stock Number/Code	Must go through Quarantine	
Request - Number of Females	Order - Age/Size	Receive - Number of Cages	
Request - Number of Cages	Order - Number of Males	Receive - Approved Location	
Request - Approved Location	Order - Number of Females		
	Order - Number of Cages		
	Order - Approved Location		

Merge Codes Applicable to Meetings

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

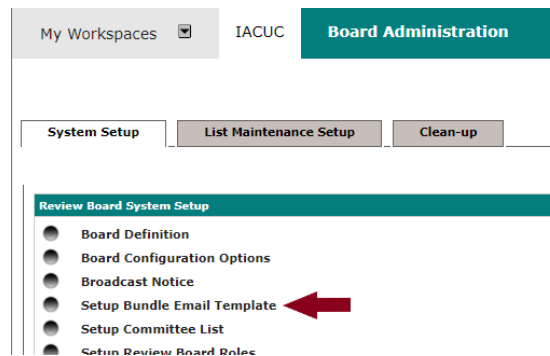
---Review Board Info ---	---Meeting Attendance Codes ---	---Submission Info ---
Review Board Name	Meeting Call to Order	Submission Approval Date
Review Board Committee Name	Meeting New Business	Submission Type
Chairperson Name (Last Name, First Name)	Meeting Old Business	Submission List of all reviewers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

---Review Board Info ---	---Meeting Attendance Codes ---	---Submission Info ---
	Meeting Motions	Project Award Number
		Project Previous Award Number
		Project Open Ended
		Is Archived
		Archived Location

Setup Bundle Email Template

Where the property `rb.use_bundle_stipulation` is set to “Yes” (accessed via IACUC Assistant > Review Board Administration > Board Configuration Options > Recommendations and Stipulations link), documents selected in the Submission Complete tab of a completed IACUC submission are bundled with an electronic cover letter for routing to selected recipients.

Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Bundle Email Template** link to configure the electronic cover letter.



The **RB Bundle Template** page opens. Notice that by default, once the applicable property is set to “Yes” an unconfigured “RB Bundle Document Template” is created, with **Title** and **Send E-Mail Notification** fields set to “Not Defined”.

My Workspaces ☒ IACUC		RB Bundle Template Back		
Edit	Type	Title	Send E-mail Notification	Action
	RB Bundle Template	Not Defined	Not Defined	Add Notification

Note that only one RB Bundle Template can be configured at any time, and once configured, that template will apply to all applicable email bundles.

Click the **Add Notification** button. The **Edit RB Bundle Template** page opens, as shown below.

Complete the page fields as follows.

E-mail Subject —subject line of the email bundle cover letter

Send E-mail Notification — select “Yes” to enable document bundling with the configured cover letter; select “No” to save the configured cover letter to the system without enabling document bundling

Recipient(s) — click the word **Recipient(s)** to add iRIS™ users to the distribution list

***Recipient(s):**

As shown below, the **Search User Directory** page opens.

Click in the **by Department** field to open a dropdown list of departments, then click a department in the list to add this criterion to the search. *Note that it is not possible to search by department alone, full or partial **Last Name** / **First Name** entries are also required.*

Enter a full or partial **Last Name** and/or **First Name** to search by name. As shown below, the **Last Name** field offers a dynamic picklist feature that populates as the **Last Name** is typed into the field.

Directory Browse/Find:

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

First Name:

by Department:

Find

As demonstrated below, clicking on a name shown in the dynamic **Last Name** picklist immediately populates search results with details for that name, it is not necessary to click the **Find** button.

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
☐	☒		Duvrong, Rapitha R		rduv@nhvc.com

When all search criteria are entered, if results are not yet populated click the **Find** button.

As indicated below, the results section of the page offers two methods for adding users to the distribution list.

Directory Browse/Find:

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

First Name:

by Department:

Find

Save Selected User(s)

Check for Multiple	Select User	Training	User Name	Department	Email
☐	☒		Duvrong, Rapitha R		rduv@nhvc.com

To add multiple users from a results list with multiple entries, select the **Check for Multiple** checkbox at far left (blue arrow) for each user to be added, then click the **Save Selected User(s)** button at the upper right (blue box).

To add a single user from the results list, click the green checkmark for the applicable user (red arrow).

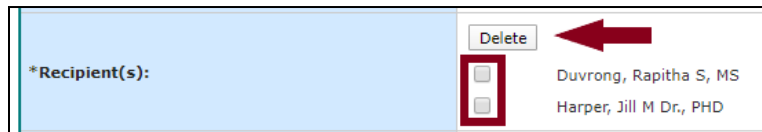
When the applicable user(s) is(are) selected from the **Search User Directory** page, that page closes and the name(s) is(are) added to the **Recipient(s)** list as shown below. To add more iRIS™ users to the list, click the word **Recipient(s)** again and repeat the user lookup/add process.

*Recipient(s):

Delete

- ☐ Duvrong, Rapitha S, MS
- ☐ Harper, Jill M Dr., PHD

If any **Recipient(s)** were added in error select the checkbox to the left of the applicable name and click the **Delete** button to delete it, as shown below.



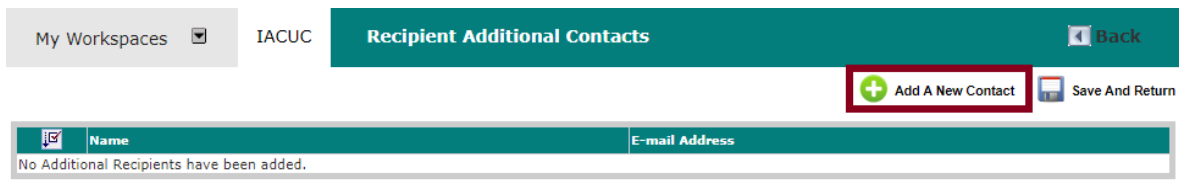
*Recipient(s):

☐	Duvrong, Rapitha S, MS
☐	Harper, Jill M Dr., PHD

The 'Delete' button is located to the right of the recipient list. A red arrow points to the checkbox next to the first recipient name.

Additional recipient(s) — click the words “**Additional recipient(s)**” to add people who do not have an iRIS™ account to the distribution list

The **Recipient Additional Contacts** page opens, as shown below.

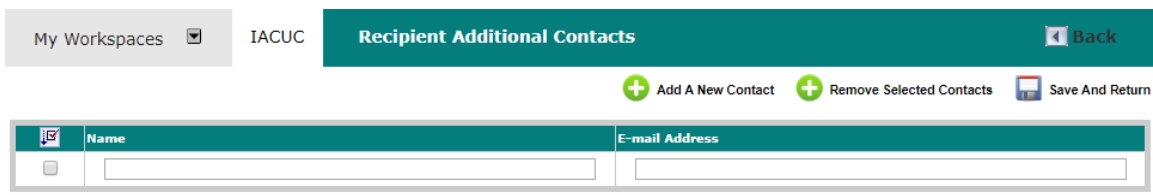


My Workspaces ▾ IACUC **Recipient Additional Contacts** Back

+ Add A New Contact Save And Return

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

Click the **Add A New Contact** link to add a blank row to the Additional Recipients table, as shown below.

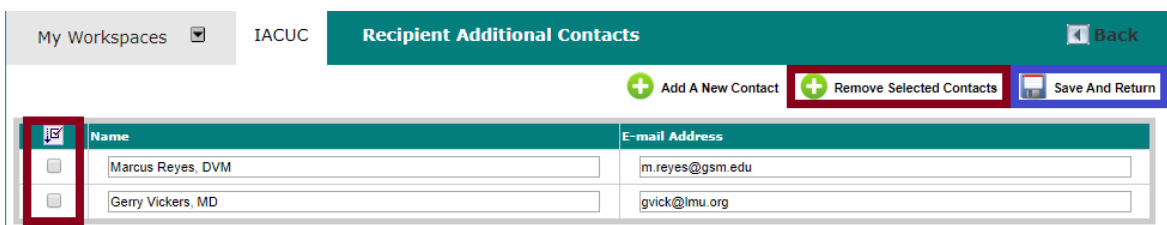


My Workspaces ▾ IACUC **Recipient Additional Contacts** Back

+ Add A New Contact + Remove Selected Contacts Save And Return

☐	Name	E-mail Address
☐		

Enter the contact **Name** and **E-mail Address**. Click the **Add a New Contact** button again and enter **Name/E-mail Address** details for every non-iRIS™ user to be added to the distribution list, as shown below.



My Workspaces ▾ IACUC **Recipient Additional Contacts** Back

+ Add A New Contact + Remove Selected Contacts Save And Return

☐	Name	E-mail Address
☐	Marcus Reyes, DVM	m.reyes@gsm.edu
☐	Gerry Vickers, MD	gvick@lmu.org

If any rows are added in error, select the checkbox in the far-left column for the applicable name and click the **Remove Selected Contacts** button (red boxes in screenshot above).

When all desired contacts are entered click the **Save And Return** button (blue box in screenshot above) to close the **Recipient Additional Contacts** page and add the listed contacts to the distribution list on the **Edit RB Bundle Template** page, as shown below.

Additional recipient(s):

Marcus Reyes, DVM; Gerry Vickers, MD

If any **Additional recipient(s)** are added in error, click the words **Additional recipient(s)** again to reopen the Recipient Additional Contacts form and delete the applicable contact(s).

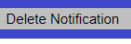
Content — enter desired text and Merge Codes (see Using Merge Codes in Document Templates subsection of this manual for more information about working with Merge Codes) for the bundle cover letter; use the provided toolbar to format the text as desired

Content:	
	Date: [%today%] PI Name: [%pi_name1%] Study Title: [%study_title%] IACUC Number: [%iacuc_number%] Review Board: [%rb_name%]

An example of a fully configured template is shown below. Click the **Save Notification** button to save the template and close the **Edit RB Bundle Template** page.

My Workspaces ▾		IACUC	Edit RB Bundle Template	Back
		Insert Merge Code Save Notification		
E-mail Subject:	IACUC Submission Complete Documents			
Send E-Mail Notification:	☒ Yes ☐ No			
*Recipient(s):	Delete ☐ Duvrong, Rapiitha S, MS ☐ Harper, Jill M Dr., PHD			
Additional recipient(s):	Marcus Reyes, DVM; Gerry Vickers, MD			
Content:				
	Date: [%today%] PI Name: [%pi_name1%] Study Title: [%study_title%] IACUC Number: [%iacuc_number%] Review Board: [%rb_name%]			

As shown below, the template is now configured on the **RB Bundle Template** page.

My Workspaces 	IACUC	RB Bundle Template 		
Edit	Type	Title	Send E-mail Notification	Action
	Bundle Email Template	IACUC Submission Complete Documents	Yes	

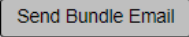
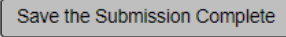
Notice that an **Edit** icon (red box in the screenshot above) is now available and the Add Notification button is now replaced with a **Delete Notification** button (blue box in the screenshot above), indicating that only one version of the template can be configured at any time.

Click the icon in the **Edit** column to reopen the template for revision in the **Edit RB Bundle Template** page.

Click the **Delete Notification** button to delete the configured template and disable document bundling with a configured cover letter.

*CAUTION: this action cannot be undone. If it later becomes necessary to resume document bundling the **RB Bundle Template** must be reconfigured according to the directions in this section.*

With the configured template in place, when an IACUC submission is completed and saved the option to **Send Bundle Email** is made available via a button, as shown below.

Submission processing complete: ☐

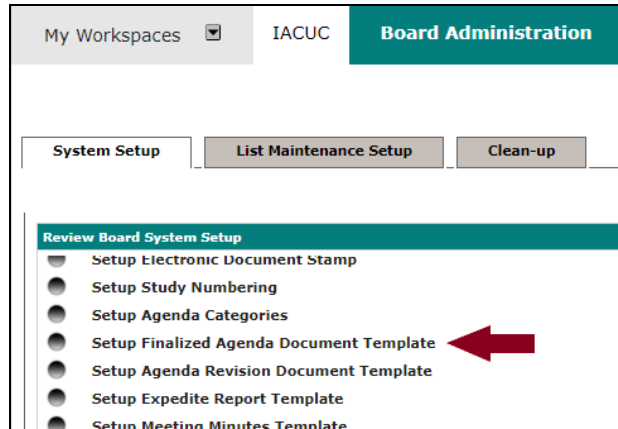
Clicking the **Send Bundle Email** button creates an email cover letter with all text, recipients and Merge Code data items as configured in the template. All configured items can be revised in this email cover letter prior to sending.

When the bundle email is sent, all documents selected in the Submission Complete tab of the applicable submission are bundled and sent to the specified recipients.

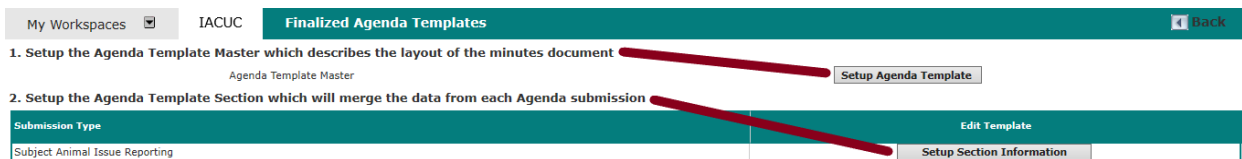
Setup Finalized Agenda Document Template

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

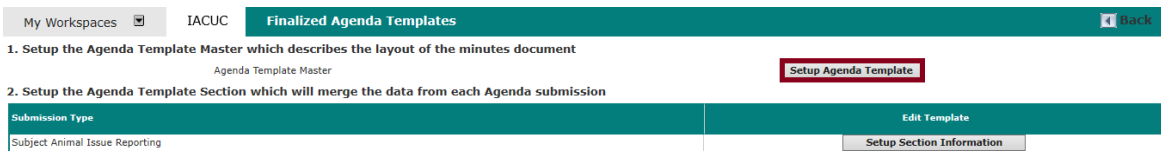
This functionality is provided on the **Finalized Agenda Templates** page. To access the page, click the **Setup Finalized Agenda Document Template** link under IACUC Assistant > Review Board Administration > System Setup tab.



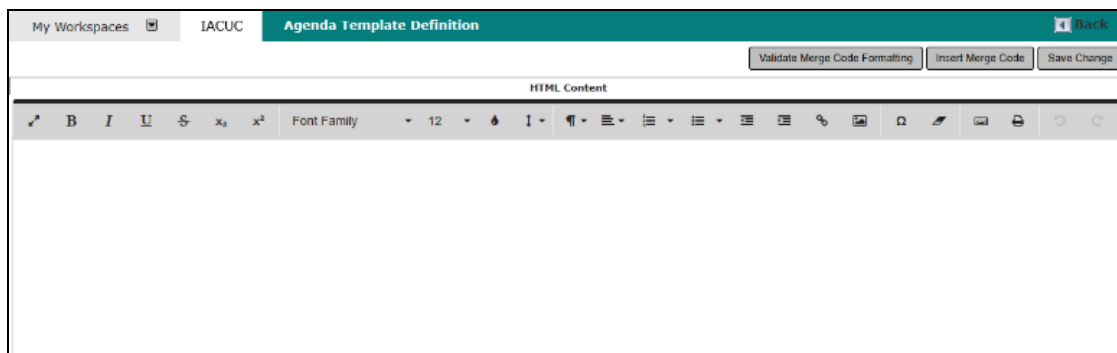
The **Finalized Agenda Templates** page opens, as shown below. Notice the two instruction items and the corresponding buttons for each.



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



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



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

Recall that this template will serve as the basis for all finalized agenda documents, and therefore it should include all items considered standard and necessary to any finalized agenda. An example of a completed finalized agenda template is shown below.

The screenshot shows the 'Agenda Template Definition' page. At the top, there's a navigation bar with 'My Workspaces' (selected), 'IACUC', and 'Agenda Template Definition'. A 'Back' button is in the top right. Below the navigation bar are three buttons: 'Validate Merge Code Formatting', 'Insert Merge Code', and 'Save Change' (highlighted with a red box). The main content area is a rich text editor titled 'HTML Content'. It has a toolbar with various formatting options. The content area contains the following text:

Finalized Meeting Agenda
[%rb_committee_name%]

Today's Date: [%today%]
 Meeting Date: [%rb_meeting_date%]
 Meeting Location: [%rb_meeting_location%]
 Chairperson: [%rb_chair_name%]
 Voting Members Present: [%vote_members_present%]
 Members Ex-Officio Present: [%members_exofficio_present%]
 Administrative Staff Present: [%members_staff_present%]
 Guests Present: [%meeting_guests%]

Meeting Call to Order: [%call_to_order%]
 Meeting Old Business: [%old_business%]
 Meeting New Business: [%new_business%]
 Meeting Motions: [%meeting_motion%]

FULL BOARD MATCHES: [%FULL_BOARD_MATCHES%]
 EXPEDITED MATCHES: [%EXPEDITED_MATCHES%]
 Meeting Adjourned: [%meeting_end%]

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

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

Note that custom agenda category configuration includes a study/protocol/project selection component that automatically limits review items pulled into the meeting to those matching specific criteria. Adding a custom category to the agenda does not pull all animal study/protocol/project items into the meeting.

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

The screenshot shows the 'Finalized Agenda Templates' page. At the top, there's a navigation bar with 'My Workspaces' (selected), 'IACUC', and 'Finalized Agenda Templates'. A 'Back' button is in the top right. Below the navigation bar are two steps:

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

Below the steps is a table:

Submission Type	Edit Template
Subject Animal Issue Reporting	Setup Section Information

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

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

The boilerplate text and Merge Codes entered here depend on the purpose of the agenda category. In this example the category is intended to add animal issue reporting to the meeting, so its content is focused on changes in animal life status and population counts. An example of a completed section definition is shown below.

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

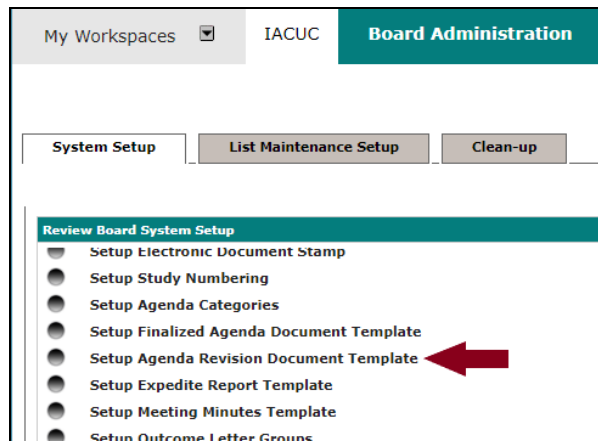
Going forward, each IACUC Meeting Agenda generated for a specific meeting date will consist of one document that includes both the Agenda Template Master and any custom sections configured as above.

See the IACUC – Meeting Agenda, Minutes, and Meeting Manager manual for more information about meeting management functionality in iRIS™.

Setup Agenda Revision Document Template

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

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



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

The screenshot displays the 'Setup Board Agenda Revision Templates' page. It includes a 'Back' button in the top right. The page is divided into two main sections: '1. Setup the Revision Template Master' and '2. Setup the Revision Template Section'. A table is shown with the following structure:

Submission Type	Edit Template
Subject Animal Issue Reporting	Setup Section Information

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

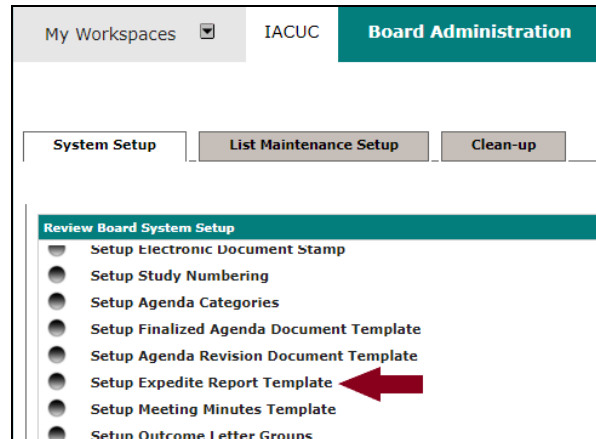
Where this feature is in use it is often necessary for the institution to configure applicable agenda categories to capture the most common agenda revision scenarios and related, pertinent data. See the Setup Agenda Categories section of this manual for more information about configuration of custom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

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

Setup Expedite Report Template

Where the property `rb.use_meeting` is set to "Yes" (accessed via IACUC Assistant > Review Board Administration > System Setup tab > Board Configuration Options > Meeting Settings link), it is possible to generate a summary of expedited reports for attachment to a meeting date.

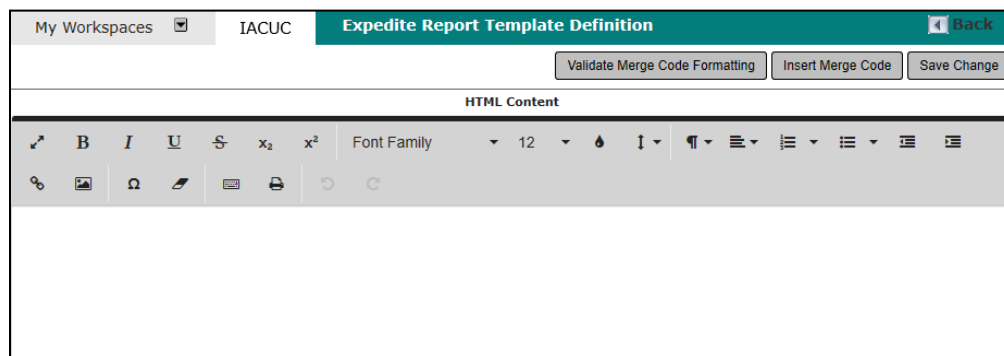
This functionality is provided on the **Setup Expedite Report Templates** page. To access the page, click the **Setup Expedite Report Template** link under IACUC Assistant > Review Board Administration > System Setup tab.



The **Setup Expedite Report Templates** page opens, as shown below.



Click the **Setup Template** button. The **Expedite Report Template Definition** text editor page opens, as shown below.



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

An example of a completed expedite report template is shown below.

My Workspaces IACUC Expedite Report Template Definition Back

Validate Merge Code Formatting Insert Merge Code Save Change

HTML Content

Expedited Items
[%rb_meeting_date%]

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

See the IACUC – Meetings manual for more information about generation of the expedited report as it relates to meeting functionality in iRIS™.

Setup Meeting Minutes Template

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

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

My Workspaces IACUC Board Administration

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Electronic Document Stamp
- Setup Study Numbering
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates

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

My Workspaces IACUC Setup Board 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
Subject Animal Issue Reporting	Setup Section Information

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

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

Setup Outcome Letter Groups

The iRIS™ system allows for collecting sets of review board forms into custom configured **Letter Type** groups for assignment to different board review types. As shown below, the **Letter Types** list on the add/edit panel of the **Setup Board Letter Templates** page (see the Setup Outcome Letter Templates section of this manual) includes two default entries:

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

Note: filters assigned to custom outcome letter groups determine those groups' availability in the dropdown list on the Outcome Letter tab, but the Outcome – General Group is always be available. For example, a letter associated to a group called “Outcome – Full Renewal Approval” that has a filter assigning that group to the Full Renewal Submission type would only be available for a Full Renewal Submission type, this letter would not be available for any other submission type.

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

My Workspaces IACUC Number: **IACUC-2018-3991** IACUC Administrator Initial Review Submission Packet

Protocol Items Miscellaneous IACUC Items Submission Forms

Ref Number: **IACUC-2018-3991-???-1.0** IACUC Number: **IACUC-2018-3991** Protocol Title: Management, Handling, Husbandry, Medical and Surgical Techniques of Small Laboratory Animals utilizing the Mouse (*Mus musculus*), the Rat (*Rattus norvegicus*), the Hamster (*Mesocricetus auratus*), the Guinea Pig (*Cavia porcellus*) and the Rabbit (*Oryctolagus cuniculus*).
 Protocol Status: Pending - Submitted for Initial Review

General Information
 Submission Components
 Correspondence
 Submission History
 Pre-review Screening
 Submission Received Notification Letter
 Review Checklist and Comments
 Review Summary

Outcome Letter

Notification Letter: **--none--**

Delete/Void	Send	Edit/View	Title	Approval Letter	Changes Requested	Route Signoff	Copy
No Letters have been created for this submission.							

Custom configured **Letter Type** groups are added to the **Letter Type** dropdown list on the **Setup Board Letter Templates** page (shown in the first screenshot above), and are optionally made available on the Outcome Letter tab of submission processing screens according to rules established at the time a **Letter Type** group is created or revised (see Add Outcome Letter Group and Edit Outcome Letter Group subsections of this manual, below).

Letter Type groups are configured on the **Setup Board Letter Group List** page, shown below.

My Workspaces IACUC Setup Board Letter Group List

	Edit	Group Name
No records found		

Add Outcome Letter Group

Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.

My Workspaces IACUC Board Administration

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Electronic Document Stamp
- Setup Study Numbering
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template
- Setup Outcome Letter Groups**
- Setup Outcome Letter Templates
- Setup Canned Motion

The **Setup Board Letter Group List** page opens. Click the **Add Group** button.

My Workspaces ▼ IACUC Setup Board Letter Group List Back

Add Group

Edit	Group Name
No records found	

An add panel is opened for creation of the group. Enter the desired **Group Name**, as shown below, then click the **Add** button at right.

My Workspaces ▼ IACUC Setup Board Letter Group List Back

Save All Changes

Group Name*: IACUC Correction Forms

Add Remove

Form Name	Expedite	Denied	Processed Administrative
No records found			

A popup opens for selection of review board forms to be included in the group. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

Select Review Board Forms - Google Chrome

Not secure

Select Cancel

Form Name
☐ Arc Order Form
☐ ARC Submission Form
☐ Feasibility Form
☒ IACUC - Pre-Review Correction Form
☐ IACUC - Review Response Form
☐ IACUC 3 Year Renewal
☒ Review Response and Correction Form
☐ IACUC Protocol 3rd Year Renewal
☐ Initial Review Submission Form
☒ Study Amendment Form

Click the **Cancel** button to close the popup without adding any forms to the group.

Select the checkbox(es) in the far-left column for all forms to be included in the group, then click the **Select** button to add them to the group and close the popup. As shown below, the selected forms are added to the list of forms on the add panel.

My Workspaces IACUC **Setup Board Letter Group List** Back

Save All Changes

Group Name*: IACUC Correction Forms

Add Remove

	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☐	☐	☐
☐	Review Response and Correction Form	☐	☐	☐
☐	Study Amendment Form	☐	☐	☐

If any forms were selected from the popup list in error, select the checkbox(es) for any forms to be removed from the group and click the **Remove** button.

My Workspaces IACUC **Setup Board Letter Group List** Back

Save All Changes

Group Name*: IACUC Correction Forms

Add Remove

	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☒	☐	☒
☐	Review Response and Correction Form	☒	☐	☒
☐	Study Amendment Form	☒	☐	☒

Select or de-select the applicable checkboxes to make each form listed available/unavailable as part of the group according to board review type when the group is selected in the **Notification Letter** dropdown list in the Outcome Letter section of submission processing screens (shown below).

Outcome Letter

Notification Letter: --none--

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

Note that all forms in the group are made available to the Full Board Review type by default.

An example of the fully configured group is shown in the screenshot below.

My Workspaces IACUC **Setup Board Letter Group List** Back

Save All Changes

Group Name*: IACUC Correction Forms

Add Remove

	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☒	☐	☒
☐	Review Response and Correction Form	☒	☐	☒
☐	Study Amendment Form	☒	☐	☒

Click the **Save All Changes** button to save the new group. As shown below, the group is added on the **Setup Board Letter Group List** page.

My Workspaces IACUC **Setup Board Letter Group List** Back

Add Group Delete Group(s)

	Edit	Group Name
☐		IACUC Correction Forms

The new **Letter Type** group is also added to the **Letter Type** dropdown list on the **Setup Board Letter Templates** page and is made available on the Outcome Letter tab of submission processing screens for **Expedite**, **Exempt** and **Process Administratively** board review types.

Edit Outcome Letter Group

Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.

My Workspaces IACUC **Board Administration**

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Electronic Document Stamp
- Setup Study Numbering
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion

The **Setup Board Letter Group List** page opens. Click icon in the **Edit** column for the applicable group.

My Workspaces IACUC **Setup Board Letter Group List** Back

Add Group Delete Group(s)

	Edit	Group Name
☐		IACUC Correction Forms

The group is opened for editing. Make any desired changes to the **Group Name**.

My Workspaces ☒ IACUC **Setup Board Letter Group List** [Back](#)

[Save All Changes](#)

Group Name*: IACUC Correction Forms

[Add](#) [Remove](#)

☒	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☒	☐	☒
☐	Review Response and Correction Form	☒	☐	☒
☐	Study Amendment Form	☒	☐	☒

To remove forms from the group, select the applicable checkbox(es) in the far-left column and click the **Remove** button.

My Workspaces ☒ IACUC **Setup Board Letter Group List** [Back](#)

[Save All Changes](#)

Group Name*: IACUC Correction Forms

[Add](#) [Remove](#)

☒	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☐	☐	☐
☐	Review Response and Correction Form	☐	☐	☐
☐	Study Amendment Form	☐	☐	☐

Select or de-select the applicable checkboxes to make each form listed available/unavailable as part of the group according to board review type when the group is selected in the **Notification Letter** dropdown list in the Outcome Letter section of submission processing screens (shown below).

Outcome Letter [?](#)

Notification Letter: --none--

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

Note that all forms in the group are made available to the Full Board Review type by default.

In the example screenshot below, checkboxes for the **Exempt** board review type are de-selected. Applying this change means that the forms shown will not be included in the Animal Order Forms group when it is selected from the **Notification Letter** dropdown list (see screenshot above) for submissions assigned to the **Exempt** board review type.

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

My Workspaces ☒ IACUC **Setup Board Letter Group List** [Back](#)

[Save All Changes](#)

Group Name*: IACUC Correction Forms

[Add](#) [Remove](#)

☐	Form Name	Expedite	Denied	Processed Administrative
☐	IACUC - Pre-Review Correction Form	☐	☐	☒
☐	Review Response and Correction Form	☐	☐	☒
☐	Study Amendment Form	☐	☐	☒

Delete Outcome Letter Group

Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.

My Workspaces ☒ IACUC **Board Administration**

[System Setup](#) [List Maintenance Setup](#) [Clean-up](#)

Review Board System Setup

- Setup Electronic Document Stamp
- Setup Study Numbering
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion

The **Setup Board Letter Group List** page opens. Select the checkbox(es) for the group(s) to be deleted and click the **Delete Group(s)** button.

My Workspaces ☒ IACUC **Setup Board Letter Group List** [Back](#)

[Add Group](#) [Delete Group\(s\)](#)

☐	Edit	Group Name
☐		IACUC Correction Forms

A confirmation popup displays.

Confirm the Deletion.

Are you sure you want to delete?

[CONFIRM](#) [CANCEL](#)

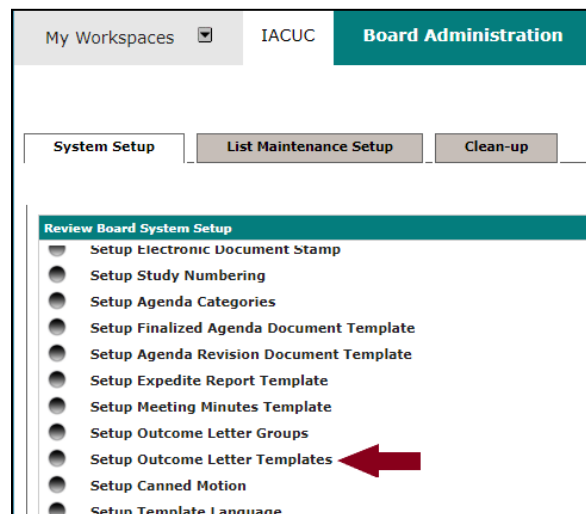
Click the **CANCEL** button to return to the **Setup Board Letter Group List** page without deleting the selected template(s).

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

Setup Outcome Letter Templates

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

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



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

My Workspaces 

IACUC

Setup Board Letter Templates

 Back

Add a New Template

Delete Selected Template(s)

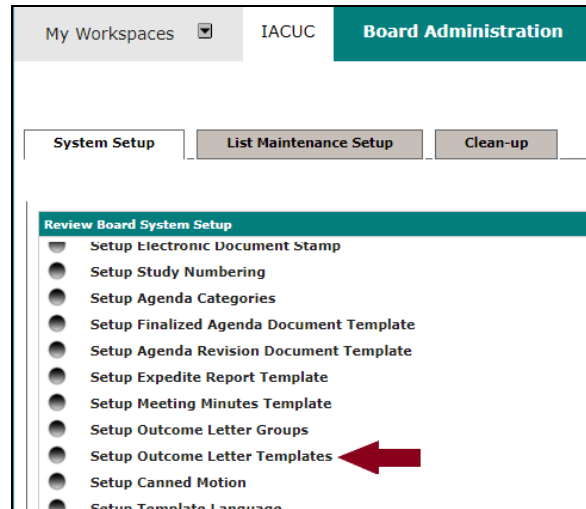
List of letter templates

2 result(s) found...

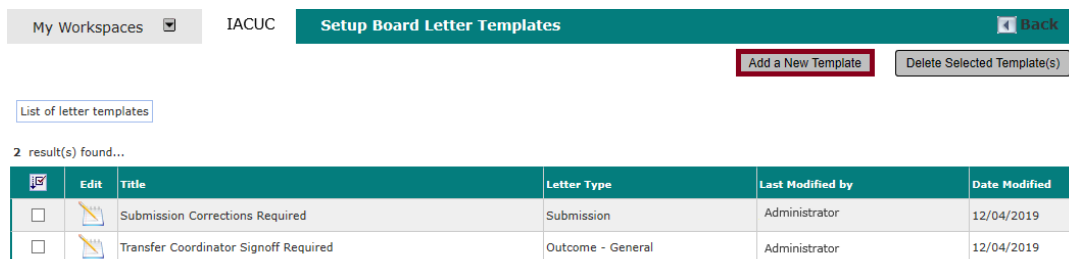
	Edit	Title	Letter Type	Last Modified by	Date Modified
☐		Submission Corrections Required	Submission	Administrator	12/04/2019
☐		Transfer Coordinator Signoff Required	Outcome - General	Administrator	12/04/2019

Add Outcome Letter Template

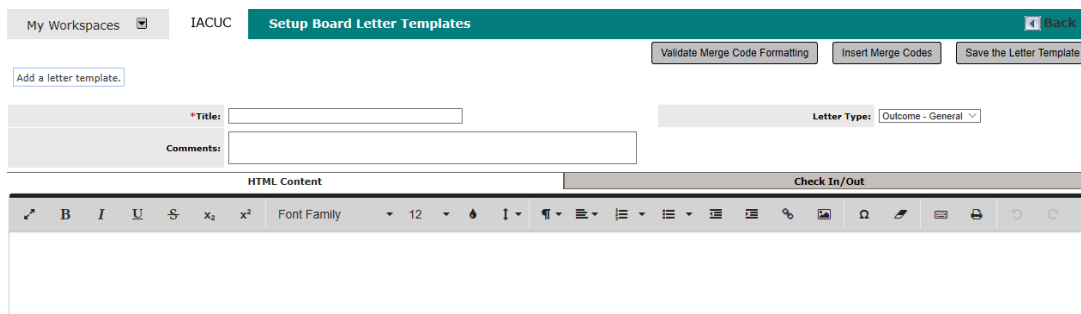
Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



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



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



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

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

My Workspaces IACUC Setup Board Letter Templates Back

Validate Merge Code Formatting Insert Merge Codes Save the Letter Template

Add a letter template.

*Title: Approved With No Conditions

Comments: Outcome letter template for use on as-is approvals

Letter Type: --none--
Submission
Outcome - General

HTML Content

Check In/Out

Note that any letter types configured via the Setup Outcome Letter Groups function are added to the **Letter Type** dropdown list. When a custom configured letter type is selected, the associated letter template's inclusion as an option available for selection on the Outcome Letter tab of submission processing screens is dictated by rules established when the Letter Group is created. See the Setup Outcome Letter Groups section of this manual for more information about configuring Letter Groups.

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

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

My Workspaces IACUC Setup Board Letter Templates Back

Validate Merge Code Formatting Insert Merge Codes Save the Letter Template

Edit a letter template.

*Title: Approved With No Conditions

Comments: Outcome letter template for use on as-is approvals

Letter Type: Outcome - General

HTML Content

Check In/Out

Approved with no conditions.
{%rb_committee_name%}

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

My Workspaces IACUC Setup Board Letter Templates Back

Add a New Template Delete Selected Template(s)

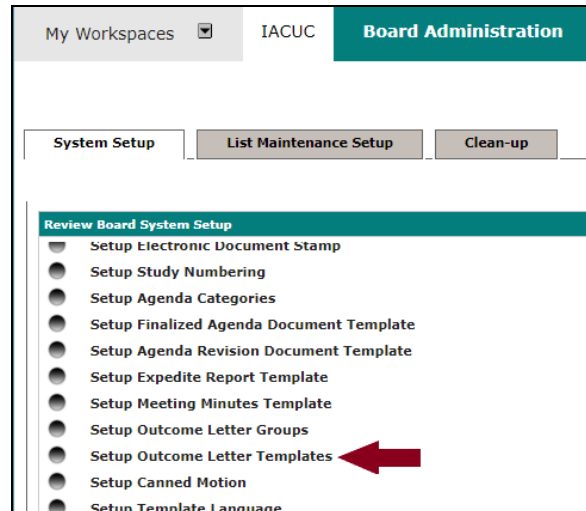
List of letter templates

3 result(s) found...

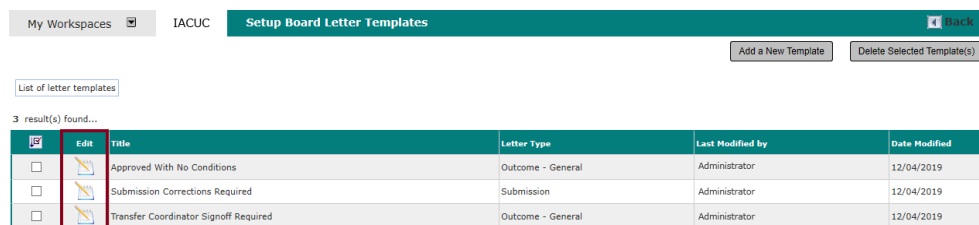
	Edit	Title	Letter Type	Last Modified by	Date Modified
☐		Approved With No Conditions	Outcome - General	Administrator	12/04/2019
☐		Submission Corrections Required	Submission	Administrator	12/04/2019
☐		Transfer Coordinator Signoff Required	Outcome - General	Administrator	12/04/2019

Edit Outcome Letter Template

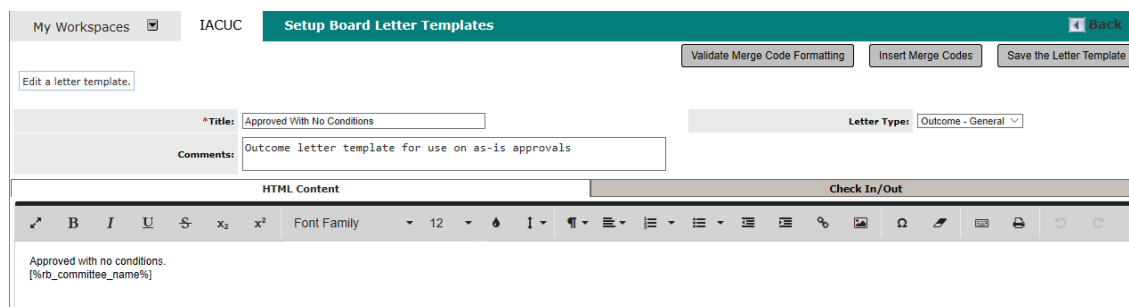
Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



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

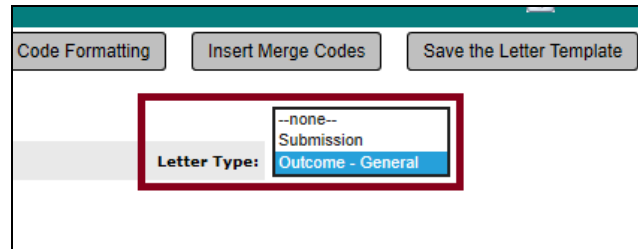


As shown below, the template is opened for editing in an Edit a letter template panel.



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

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

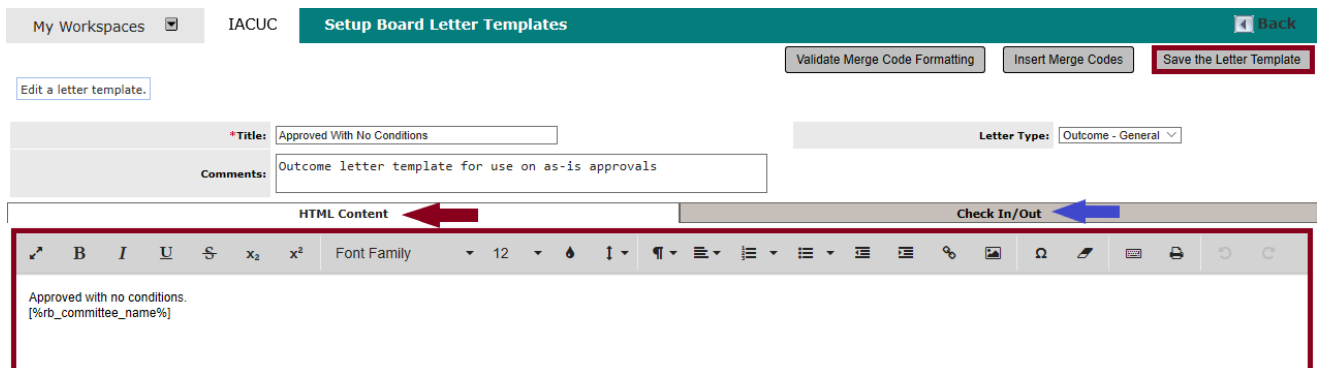


Note that any letter types configured via the Setup Outcome Letter Groups function are added to the **Letter Type** dropdown list. When a custom configured letter type is selected, the associated letter template's inclusion as an option available for selection on the Outcome Letter tab of submission processing screens is dictated by rules established when the Letter Group is created. See the Setup Outcome Letter Groups section of this manual for more information about configuring Letter Groups.

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

As shown below, the **HTML Content** tab (red arrow and box) allows for direct editing in the text editor window.

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



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

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

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

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

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

My Workspaces IACUC Setup Board Letter Templates [Back](#)

Validate Merge Code Formatting Insert Merge Codes Save the Letter Template

Edit a letter template.

*Title: Approved With No Conditions Letter Type: Outcome - General

Comments: Outcome letter template for use on as-is approvals

HTML Content Check In/Out

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

Download Document Upload Document...

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

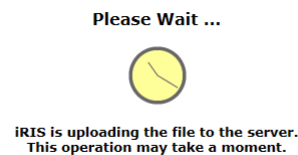
Add User Document:

Document Location: Browse...

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.

Save selected file Cancel

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



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

My Workspaces IACUC Setup Board Letter Templates [Back](#)

Validate Merge Code Formatting Insert Merge Codes Save the Letter Template

Edit a letter template.

*Title: Approved With No Conditions Letter Type: Outcome - General

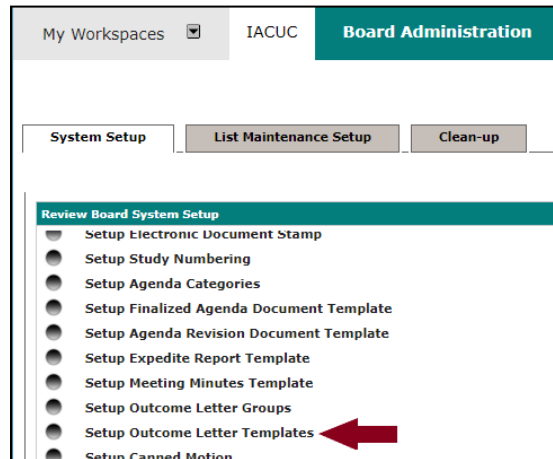
Comments: Outcome letter template for use on as-is approvals

HTML Content Check In/Out

Approved with no conditions.
[%rb_committee_name%]

Delete Outcome Letter Template

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



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

My Workspaces 

IACUC

Setup Board Letter Templates

 Back

Add a New Template

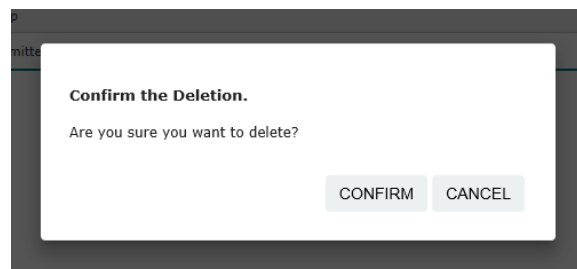
Delete Selected Template(s)

List of letter templates

3 result(s) found...

	Edit	Title	Letter Type	Last Modified by	Date Modified
☐		Approved With No Conditions	Outcome - General	Administrator	12/04/2019
☐		Submission Corrections Required	Submission	Administrator	12/04/2019
☐		Transfer Coordinator Signoff Required	Outcome - General	Administrator	12/04/2019

A confirmation popup displays.



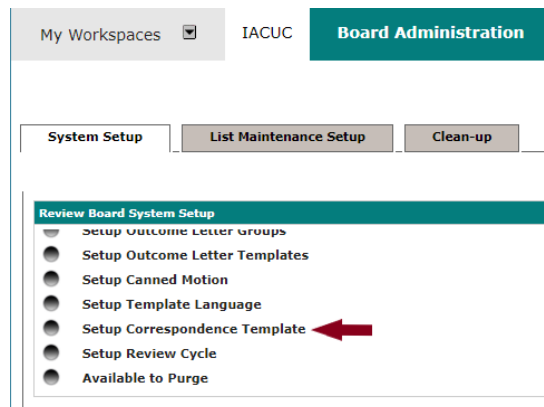
Click the **CANCEL** button to return to the **Setup Board Letter Templates** page without deleting the selected template(s).

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

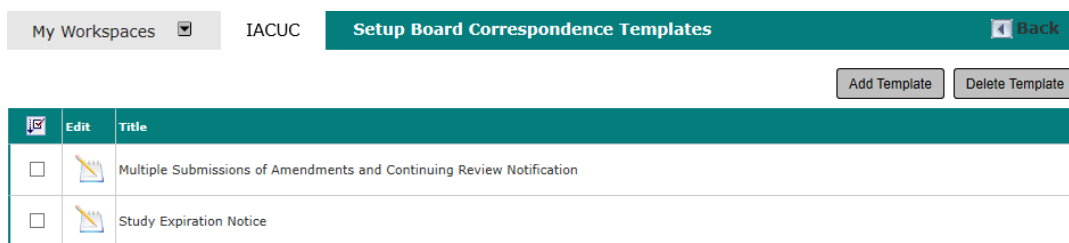
Setup Correspondence Templates

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

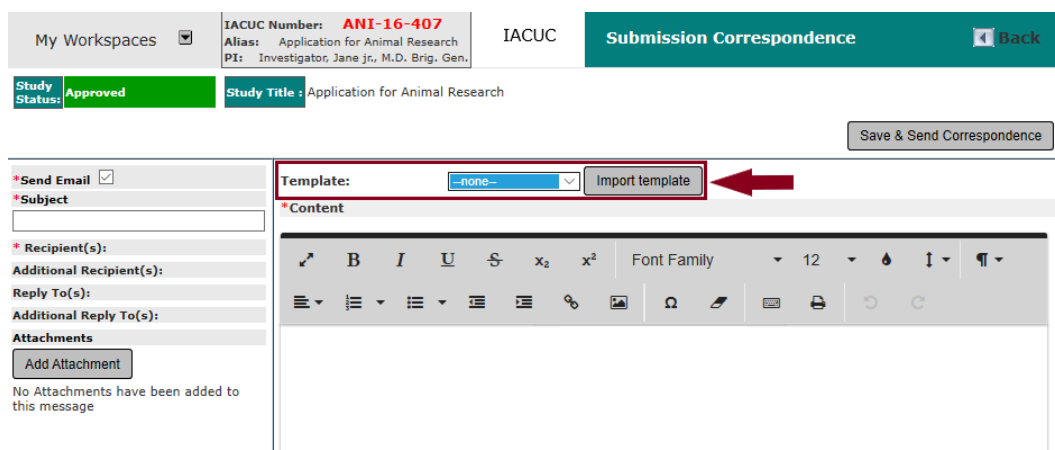
This functionality is provided on the **Setup Board Correspondence Templates** page. To access the page, click the **Setup Correspondence Template** link under IACUC Assistant > Review Board Administration > System Setup tab.



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



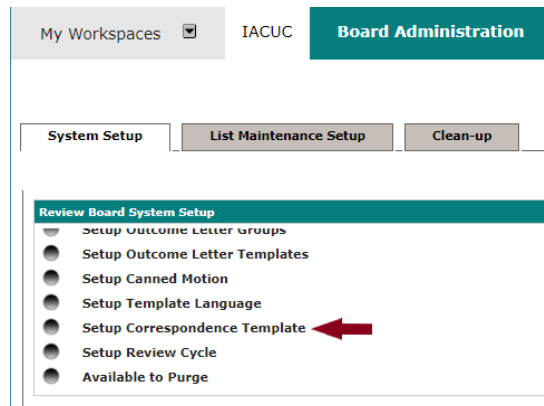
Correspondence templates can be employed when creating a correspondence record within the submission processing screens. Configured templates are made available via a **Template** dropdown picklist above the embedded rich text editor.



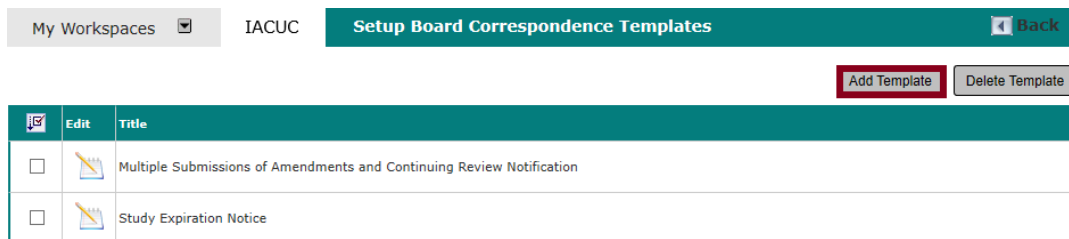
The desired template is selected in the list and when the **Import template** button is clicked, the template's content is pulled into the text editor.

Add Correspondence Template

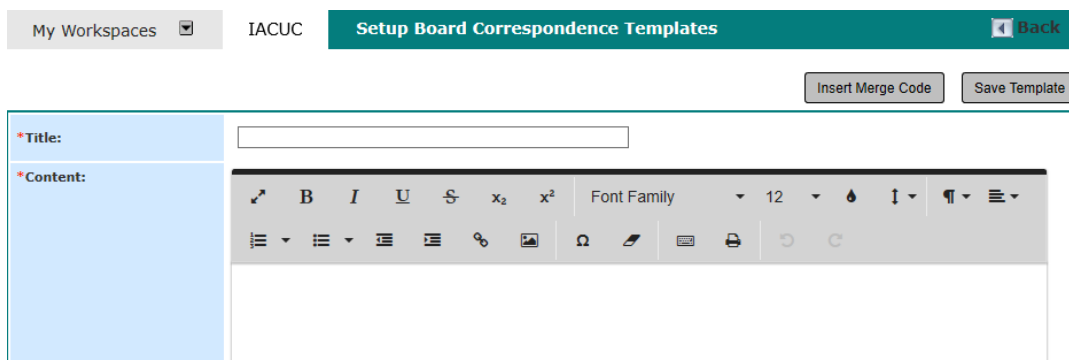
Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



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



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



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

My Workspaces ▾ IACUC Setup Board Correspondence Templates [Back](#)

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

***Title:**

***Content:**

Verdana 11

[%today%]

Dear [%pi_fname%] [%pi_lname%]:

To fulfill the terms of the FederalWide Assurance our Institution and the DHHS Office for Human Research Protections (OHRP), the IRB requires that investigators and their research staff complete a course in the protection of human research subjects every 3 years.

Your certification in research education expired on [Insert Expiration Date]

Because you are the principal investigator for this study and because your research education certification has expired:

1. Accrual of subjects into this study is suspended immediately.
2. You and your co-investigators and research staff may follow subjects already enrolled for safety, but no new subjects may be enrolled and the data already collected may not be analyzed.
3. If this is a chart review or database study, you must not collect data on new subjects and you must stop analyzing data that you have already collected.
4. The status of the study referenced above has been changed to "Temporarily Closed to Accrual – Administratively Inactivated."
5. The IRB will not review any new protocol that you submit to the IRB as a principal investigator.
6. The IRB will not approve your participation as a co-investigator in any new research protocol
7. The IRB will not renew approval of your participation in any studies that are due for continuing review.

When the IRB has received a copy of your certificate documenting completion of the education requirement, you will be notified in writing that you may resume accrual of new subjects to this study or resume data collection and analysis for a chart review/database study and the study status will be returned to "Open" status.

You may not enroll new subjects until you have been informed in writing by the IRB that you have approval to do so.

Options for renewal of research education:

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

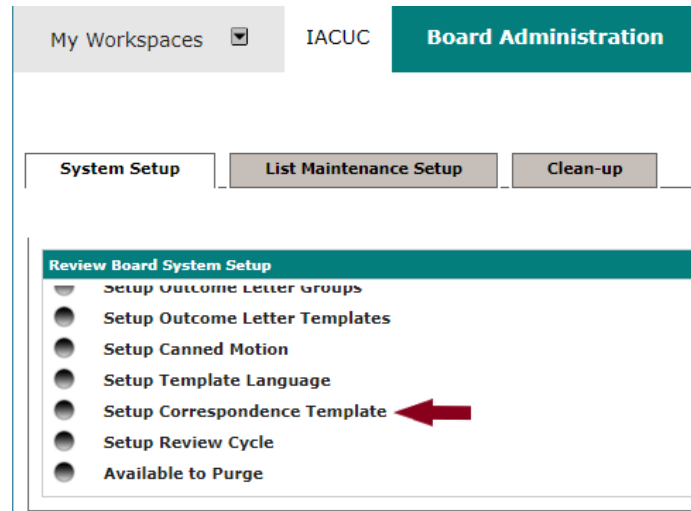
My Workspaces ▾ IACUC Setup Board Correspondence Templates [Back](#)

[Add Template](#) [Delete Template](#)

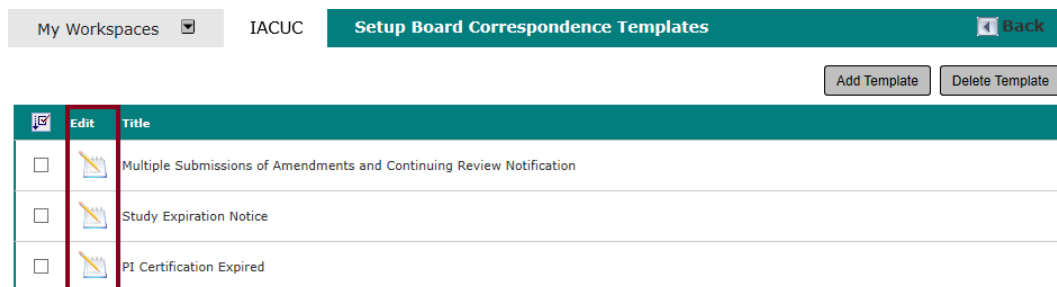
	Edit	Title
☐		Multiple Submissions of Amendments and Continuing Review Notification
☐		Study Expiration Notice
☐		PI Certification Expired

Edit Correspondence Template

Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



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



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

My Workspaces IACUC **Setup Board Correspondence Templates** Back

Insert Merge Code **Save Template**

***Title:** PI Certification Expiration Notice

***Content:**

Rich text editor content:

[%today%]

Dear [%pi_fname%] [%pi_lname%]:

To fulfill the terms of the FederalWide Assurance our Institution and the DHHS Office for Human Research Protections (OHRP), the IRB requires that investigators and their research staff complete a course in the protection of human research subjects every 3 years.

Your certification in research education expired on [Insert Expiration Date]

Because you are the principal investigator for this study and because your research education certification has expired:

1. Accrual of subjects into this study is suspended immediately.
2. You and your co-investigators and research staff may follow subjects already enrolled for safety, but no new subjects may be enrolled and the data already collected may not be analyzed.
3. If this is a chart review or database study, you must not collect data on new subjects and you must stop analyzing data that you have already collected.
4. The status of the study referenced above has been changed to "Temporarily Closed to Accrual – Administratively Inactivated."
5. The IRB will not review any new protocol that you submit to the IRB as a principal investigator.
6. The IRB will not approve your participation as a co-investigator in any new research protocol
7. The IRB will not renew approval of your participation in any studies that are due for continuing review.

When the IRB has received a copy of your certificate documenting completion of the education requirement, you will be notified in writing that you may resume accrual of new subjects to this study or resume data collection and analysis for a chart review/database study and the study status will be returned to "Open" status.

You may not enroll new subjects until you have been informed in writing by the IRB that you have approval to do so.

Options for renewal of research education:

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

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

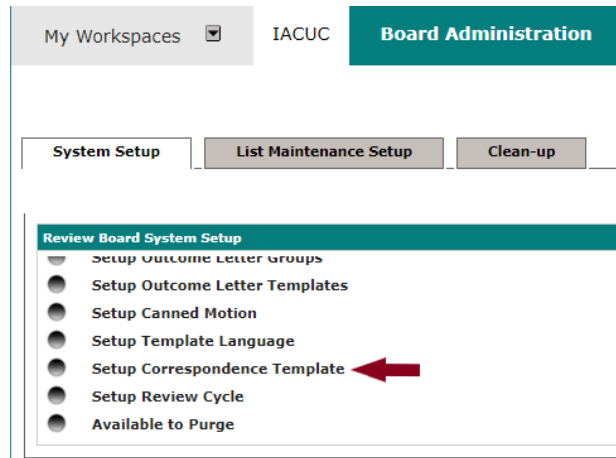
My Workspaces IACUC **Setup Board Correspondence Templates** Back

Add Template Delete Template

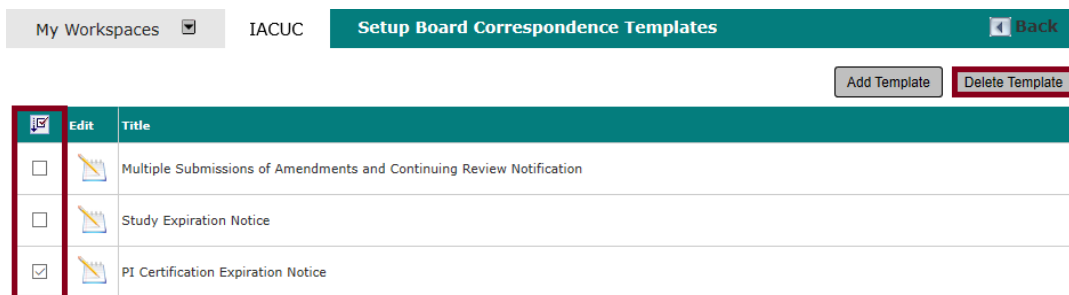
	Edit	Title
☐		Multiple Submissions of Amendments and Continuing Review Notification
☐		Study Expiration Notice
☐		PI Certification Expiration Notice

Delete Correspondence Template

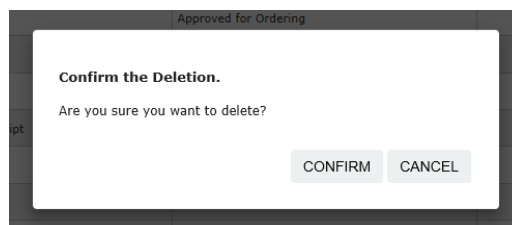
Navigate to IACUC Assistant > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



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



A confirmation popup window displays.



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

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

My Workspaces ☒ IACUC **Setup Board Correspondence Templates** [Back](#)

[Add Template](#) [Delete Template](#)

☒	Edit	Title
☐		Multiple Submissions of Amendments and Continuing Review Notification
☐		Study Expiration Notice

Setup Canned Motion

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

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

My Workspaces ☒ IACUC **Submission Motion** [Back](#)

[Save Changes](#)

"Precanned Motion text" allows you to import text from a pre-defined template.

Precanned Motion text:

[Add Canned Language](#)

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

My Workspaces ☒ IACUC **Board Administration**

[System Setup](#) [List Maintenance Setup](#) [Clean-up](#)

Review Board System Setup

- [Setup Meeting Minutes Template](#)
- [Setup Outcome Letter Groups](#)
- [Setup Outcome Letter Templates](#)
- [Setup Canned Motion](#)
- [Setup Template Language](#)
- [Setup Correspondence Template](#)
- [Setup Review Cycle](#)
- [Available to Purge](#)

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

My Workspaces ▾ IACUC **Setup Canned Motion List** [Back](#)

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

List of approved canned motion

2 result(s) found...

☐	Edit	Motion Name
☐		Approved
☐		Minutes Approved

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

My Workspaces ▾ IACUC **Submission Motion** [Back](#)

[Save Changes](#)

"Precanned Motion text" allows you to import text from a pre-defined template.

Precanned Motion text: —none—

[Add Canned Language](#)

Font Family 12

Add Canned Motion

Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Canned Motion** link.

My Workspaces ▾ IACUC **Board Administration**

[System Setup](#) [List Maintenance Setup](#) [Clean-up](#)

Review Board System Setup

- [Setup Meeting Minutes Template](#)
- [Setup Outcome Letter Groups](#)
- [Setup Outcome Letter Templates](#)
- [Setup Canned Motion](#)
- [Setup Template Language](#)
- [Setup Correspondence Template](#)
- [Setup Review Cycle](#)
- [Available to Purge](#)

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

My Workspaces IACUC **Setup Canned Motion List** Back

Add a New Motion Delete Selected Motion(s)

List of approved canned motion

2 result(s) found...

		Motion Name
☐		Approved
☐		Minutes Approved

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

My Workspaces IACUC **Setup Canned Motion List** Back

Save Motion

Add Canned Motion of submission item.

*Name:

*Item Number:

Click here to edit/view the motion text

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

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

My Workspaces IACUC **Setup Canned Motion List** Back

Save Motion

Add Canned Motion of submission item.

*Name:

*Item Number:

Click here to edit/view the motion text

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

[illegible]

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

As shown below, the text is added to the **Add Canned Motion of submission item** panel. Click the **Save Motion** button.

My Workspaces

IACUC

Setup Canned Motion List

Back

Save Motion

Add Canned Motion of submission item.

*Name:

Full Board Renewal Approved 1 Yr

*Item Number:

3

Click here to edit/view the motion text

Main Full Board Vote:

A motion was made and seconded to renew approval of this study for one year with the current stamp/approved consent form and HIPAA authorization addendum on file. A vote was taken and the motion was approved.

As shown below, the motion is added on the **Setup Canned Motion List** page.

My Workspaces

IACUC

Set up Canned Motion List

Back

Add a New Motion

Delete Selected Motion(s)

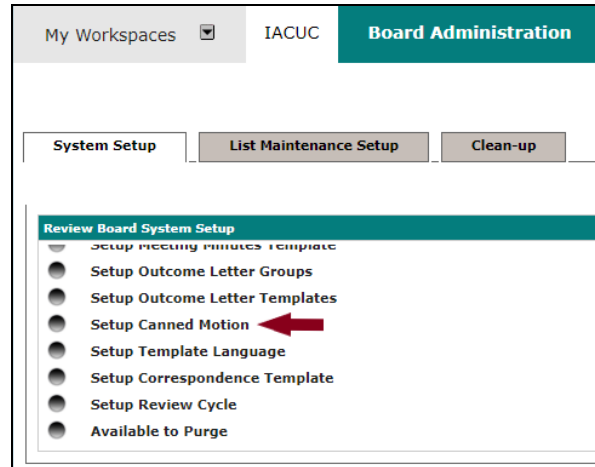
List of approved canned motion

3 result(s) found...

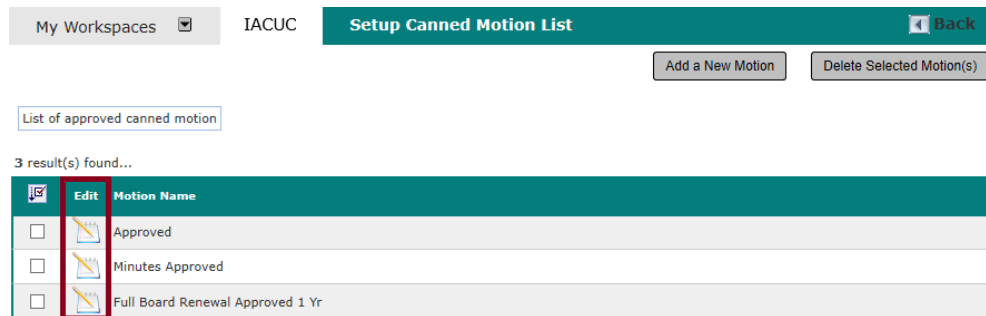
	Edit	Motion Name
☐		Approved
☐		Minutes Approved
☐		Full Board Renewal Approved 1 Yr

Edit Canned Motion

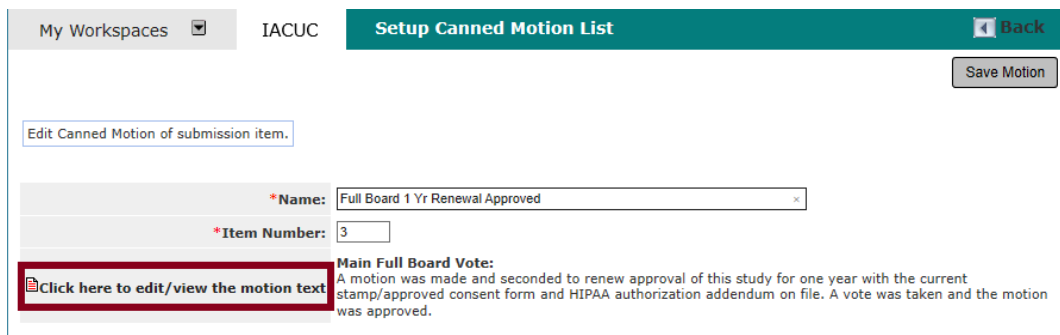
Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



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



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



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

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

My Workspaces IACUC IACUC - Canned Motion text Back

Canned Motion text

Main Full Board Vote:
 A motion was made and seconded to renew approval of this study for one year with the current stamp/approved consent form and HIPAA authorization addendum on file. A vote was taken and the motion was approved.]

When changes are complete click the **Save** button. As shown below, the text is added to the Edit Canned Motion of submission item panel. Click the **Save Motion** button.

My Workspaces IACUC Setup Canned Motion List Back

Edit Canned Motion of submission item.

*Name: Full Board 1 Yr Renewal Approved

*Item Number: 3

Main Full Board Vote:
 A motion was made and seconded to renew approval of this study for one year with the current stamp/approved consent form and HIPAA authorization addendum on file. A vote was taken and the motion was approved.

As shown below, the motion is revised on the **Setup Canned Motion List** page.

My Workspaces IACUC Setup Canned Motion List Back

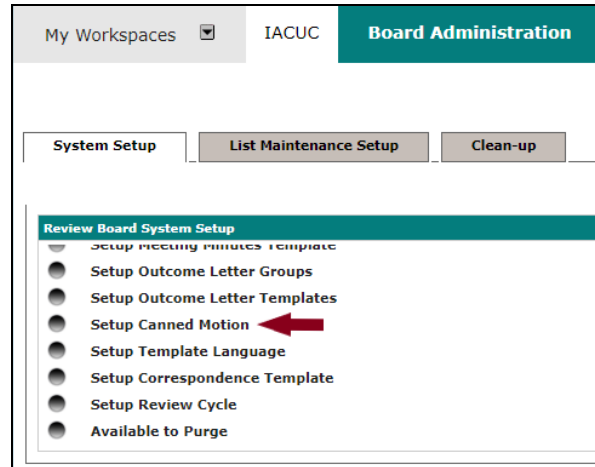
List of approved canned motion

3 result(s) found...

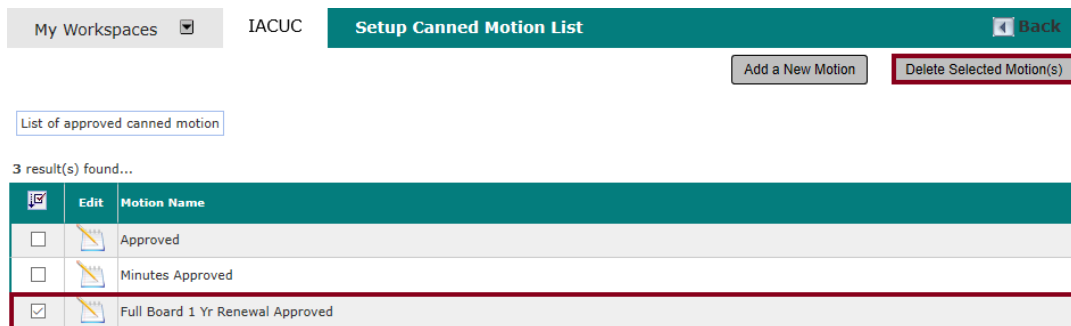
	Edit	Motion Name
☐		Approved
☐		Minutes Approved
☐		Full Board 1 Yr Renewal Approved

Delete Canned Motion

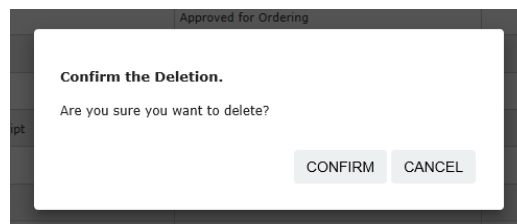
Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



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



A confirmation popup window displays.



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

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

My Workspaces IACUC **Setup Canned Motion List** [Back](#)

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

List of approved canned motion

2 result(s) found...

☐	Edit	Motion Name
☐		Approved
☐		Minutes Approved

Setup Template Language

The iRIS™ system provides the ability for institutions to configure a list of predefined (“canned”) text blocks for insertion in Minutes, Agendas, and Outcome Letter documents via an **Insert Template Language** button, as shown below.

My Workspaces IACUC **Letter** [Back](#)

[Expand Word Window](#) [Insert Template Language](#) [Save Letter Changes](#)

HTML Content

Check In/Out

Reference Number:
IACUC-2018-3991-777-1.0

Submission Type:
Initial Review Submission Packet

IACUC Number:
IACUC-2018-3991

Study Number:
IA7834837483

Does this letter require signature signoffs?
☐ Yes ☒ No

Share this letter with other Boards?
☐ Yes ☒ No

Today's Date: August 20, 2019

Approval Letter
Animal Research Committee

To access the configuration list, click the **Setup Template Language** link under IACUC Assistant > Review Board Administration > System Setup tab.

My Workspaces IACUC **Board Administration**

[System Setup](#) [List Maintenance Setup](#) [Clean-up](#)

Review Board System Setup

- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language
- Setup Correspondence Template
- Setup Review Cycle
- Available to Purge

The **Setup Template Language List** page opens.

My Workspaces IACUC **Setup Template Language List** [Back](#)

[Add a New Approved Text](#) [Delete Approved Text](#)

List of template language

1 result(s) found...

☐	Edit	Name	Merge Code
☐		IACUC Signature	[%signature_iacuc%]

Any block of template language configured here is saved as a Merge Code and made available for insertion in Minutes, Agendas, and Outcome Letters via an **Add Canned Language** button on the applicable processing pages.

My Workspaces ▾ IACUC Submission Motion Back

Save Changes

"Precanned Motion text" allows you to import text from a pre-defined template.

Precanned Motion text: -none--

Add Canned Language

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

Add Template Language

Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Template Language** link.

My Workspaces ▾ IACUC Board Administration

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language
- Setup Correspondence Template
- Setup Review Cycle
- Available to Purge

The **Setup Template Language List** page opens. Click the **Add a New Approved Text** button.

My Workspaces ▾ IACUC Setup Template Language List Back

Add a New Approved Text Delete Approved Text

List of template language

1 result(s) found...

	Edit	Name	Merge Code
☐		IACUC Signature	[%signature_iacuc%]

As shown below, an **Add a language item** panel opens for configuration of the text block.

Enter a descriptive **Name** and the desired Merge **Code** to be assigned to the block of text. *Note that the code must include underscores where spaces occur between words, and cannot include any special characters (e.g., &, #, etc.).*

In the example below, a Name and Code are entered. Click the **click here to add the language text** link.

The **Approved Template text** page opens with a text editor for entry and formatting of the text block. Notice that no Insert Merge Code button is available on this page. This is because the text block entered here will itself be saved as a Merge Code, and Merge Codes cannot be nested within text blocks.

In the example shown above the desired text is entered. Click the **Save Change** button. The text block is added to the **Add a language item** panel.

My Workspaces IACUC **Setup Template Language List** Back

Save Approved Text

Add a language item.

*Name:

*Code:

click here to add the language text

A potential conflict of interest (COI) has been identified for one or more study personnel. Please contact the designated Coordinator for more information and required next steps.

Click the **Save Approved Text** button. As shown below, the item is added on the **Setup Template Language List** page.

My Workspaces IACUC **Setup Template Language List** Back

Add a New Approved Text Delete Approved Text

List of template language

2 result(s) found...

		Name	Merge Code
☐		IACUC Signature	[%signature_iacuc%]
☐		COI Questions	[%coi_questions%]

Edit Template Language

Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Template Language** link.

My Workspaces IACUC **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

Review Board System Setup

- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language
- Setup Correspondence Template
- Setup Review Cycle
- Available to Purge

The **Setup Template Language List** page opens. Click the icon in the **Edit** column for the applicable item.

My Workspaces IACUC **Setup Template Language List** Back

Add a New Approved Text Delete Approved Text

List of template language

2 result(s) found...

	Edit	Name	Merge Code
☐		IACUC Signature	[%signature_iacuc%]
☐		COI Questions	[%coi_questions%]

As shown below, an **Edit a language item** panel opens for revision of the text block.

My Workspaces IACUC **Setup Template Language List** Back

Save Approved Text

Edit a language item.

*Name: IACUC Signature

*Code: [%signature_iacuc %]

click here to add the language text

Thank you for your time,
Please contact [add contact], phone number [add phone number] with any specific questions, or
email IACUC@davis.edu for general inquiries.

Make desired changes to the **Name** and Merge **Code** fields. *Note that the code must include underscores where spaces occur between words, and cannot include any special characters (e.g., &, #, etc.).*

Click the **click here to add the language text** link to edit the text block. As shown below, the text block is opened for editing in the **Approved Template text** page.

My Workspaces IACUC **IACUC - Approved Template text** Back

Save Change

HTML Content

Thank you for your time,
Please contact [add contact], phone number [add phone number] with any specific questions, or email [add email address] for general inquiries.

Notice that no Insert Merge Code button is available on this page. This is because the text block entered here will itself be saved as a Merge Code, and Merge Codes cannot be nested within text blocks.

Make desired changes to the text block, then click the **Save Change** button. As shown below, the text is added to the **Edit a language item** panel. Click the **Save Approved Text** button.

My Workspaces IACUC **Setup Template Language List** Back

Save Approved Text

Edit a language item.

*Name: IACUC Signature

*Code: [%signature_iacuc %]

click here to add the language text

Thank you for your time,
Please contact [add contact], phone number [add phone number] with any specific questions, or email [add email address] for general inquiries.

The edit panel closes, and the item is revised.

My Workspaces IACUC **Setup Template Language List** Back

Add a New Approved Text Delete Approved Text

List of template language

2 result(s) found...

	Edit	Name	Merge Code
☐		IACUC Signature	[%signature_iacuc%]
☐		COI Questions	[%coi_questions%]

Delete Template Language

Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Template Language** link.

My Workspaces IACUC **Board Administration**

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Meeting Minutes Template
- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language
- Setup Correspondence Template
- Setup Review Cycle
- Available to Purge

The **Setup Template Language List** page opens. Select the checkbox(es) in the far-left column for the item(s) to be deleted, then click the **Delete Approved Text** button.

My Workspaces ▾ IACUC Setup Template Language List [Back](#)

[Add a New Approved Text](#) [Delete Approved Text](#)

List of template language

2 result(s) found...

☐	Edit	Name	Merge Code
☐		IACUC Signature	[%signature_iacuc%]
☒		COI Questions	[%col_questions%]

A confirmation popup window displays.

Approved for Ordering

Confirm the Deletion.

Are you sure you want to delete?

[CONFIRM](#) [CANCEL](#)

Click **CANCEL** to return to the **Setup Template Language List** page without deleting the item(s).

Click **CONFIRM** to delete the item(s) and return to the **Setup Template Language List** page. The item(s) is(are) deleted.

My Workspaces ▾ IACUC Setup Template Language List [Back](#)

[Add a New Approved Text](#) [Delete Approved Text](#)

List of template language

1 result(s) found...

☐	Edit	Name	Merge Code
☐		IACUC Signature	[%signature_iacuc%]

Setup Review Cycle

The iRIS™ system provides the ability to configure standardized review cycle terms for use in submission processing date calculations.

Navigate to IACUC Assistant > Review Board Administration > Setup Review Cycle link.

My Workspaces ▾ IACUC Board Administration

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language
- Setup Correspondence Template
- Setup Review Cycle** ←
- Available to Purge

The **Setup Review Cycle List** page opens, as shown below.

My Workspaces ▾ IACUC Setup Review Cycle List Back

Add a Review Cycle Delete Review Cycle(s)

2 result(s) found...

☐	Edit	Name
☐		Biannual
☐		Annual

Review cycles configured here populate the **Review Cycle** dropdown picklist on the **Outcome** tab of submission processing screens (red box and arrow in screenshot below).

When an item is selected from the **Review Cycle** picklist on an approved submission, the **IACUC Expiration Date** field automatically calculates the corresponding expiration date (blue box and arrow in screenshot below) based on the Submission Approval date.

My Workspaces ▾ IACUC Numbers: ANI-15-376 IACUC: Committee A Initial Review Submission Form Back

Protocol Items Miscellaneous IACUC Items Submission Forms Additional Attached Forms

Ref Number: ANI-15-376-INT-1.0 IACUC Number: ANI-15-376 Study Title: Animal Protocol Application-IACUC TI-12-29.2015

Study Status: Pending - Submitted for Initial Review

Save the Submission Outcome

IACUC Review Outcome

Review Outcome: --none-- Study Status: Pending - Submitted for Initial Review

Additional Information required: No

Submission Approval:

Meeting Approval Date:

Internal Comments:

Shared Comments:

Take Note:

Meeting Date: 08/30/2019 @ 01:00 PM

Review Cycle: --none-- ←

Teaching: ☐ Yes ☒ No

Type Assigned: --none--

Temporary Closed: ☐ Yes ☒ No

IACUC Initial Approval:

IACUC Expiration Date: ←

USDA Class: --none--

Last Continuing Review Approved:

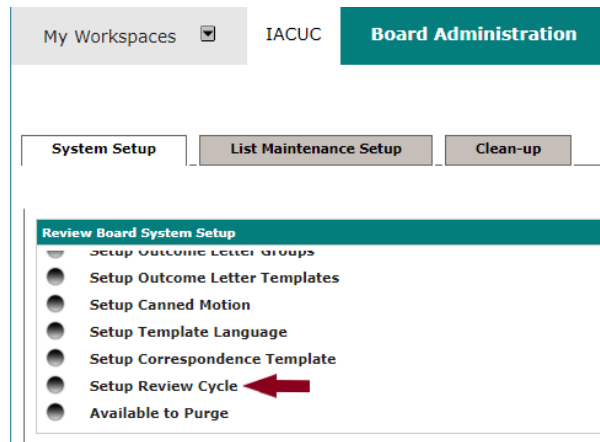
Continuing Review Due:

Add a Protocol Version amendment

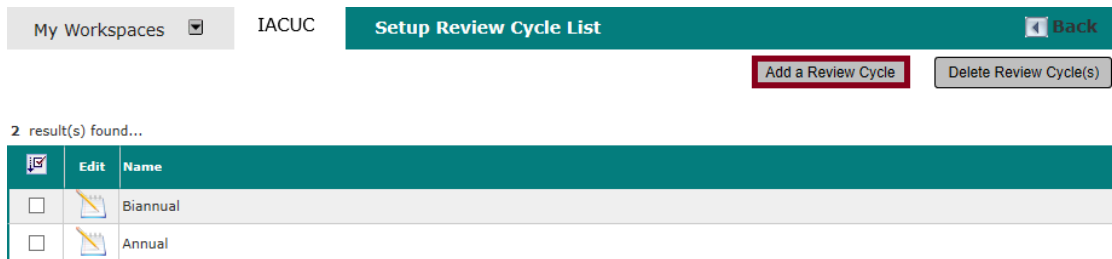
Note that where the **Review Cycle** field is left blank the user designates an expiration date using the calendar widget provided for the expiration date field.

Add Review Cycle

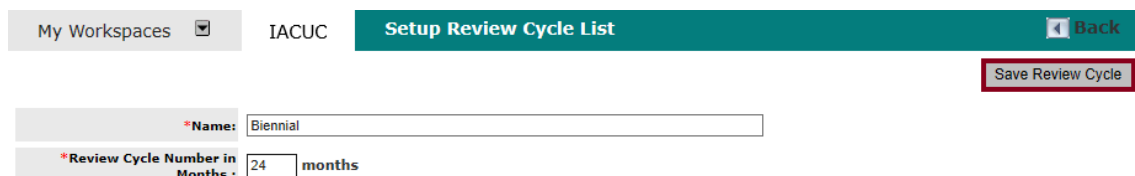
Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Review Cycle** link.



The **Setup Review Cycle List** page opens, as shown below. Click the **Add a Review Cycle** button.



An add panel is opened for creation of the new review cycle. Enter a descriptive **Name**, then enter the number of months for the cycle in the **Review Cycle Number in Months** field. An example of the filled panel is shown below.



Click the **Save Review Cycle** button to save the new review cycle and close the add panel. As shown below, the new review cycle is added on the **Setup Review Cycle List** page.

My Workspaces IACUC **Setup Review Cycle List** Back

Add a Review Cycle Delete Review Cycle(s)

3 result(s) found...

		Name
☐		Biannual
☐		Annual
☐		Biennial

Edit Review Cycle

Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Review Cycle** link.

My Workspaces IACUC **Board Administration**

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language
- Setup Correspondence Template
- Setup Review Cycle**
- Available to Purge

The **Setup Review Cycle List** page opens, as shown below. Click the icon in the **Edit** column for the applicable review cycle.

My Workspaces IACUC **Setup Review Cycle List** Back

Add a Review Cycle Delete Review Cycle(s)

3 result(s) found...

		Name
☐		Biannual
☐		Annual
☐		Biennial

The selected review cycle is opened in an edit panel. Make desired changes to the **Name** and **Review Cycle Number in Months** fields, then click the **Save Review Cycle** button to save changes and close the edit panel.

My Workspaces IACUC **Setup Review Cycle List** Back

Save Review Cycle

*Name:

*Review Cycle Number in Months: months

The review cycle is revised on the **Setup Review Cycle List** page.

My Workspaces IACUC **Setup Review Cycle List** Back

Add a Review Cycle Delete Review Cycle(s)

3 result(s) found...

	Edit	Name
☐		Six Months
☐		Annual
☐		Biennial

Delete Review Cycle

Navigate to IACUC Assistant > Review Board Administration > System Setup tab > **Setup Review Cycle** link.

My Workspaces IACUC **Board Administration**

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Setup Outcome Letter Groups
- Setup Outcome Letter Templates
- Setup Canned Motion
- Setup Template Language
- Setup Correspondence Template
- Setup Review Cycle
- Available to Purge

The **Setup Review Cycle List** page opens, as shown below. Select the checkbox(es) in the far-left column for the review cycle(s) to be deleted, then click the **Delete Review Cycle(s)** button.

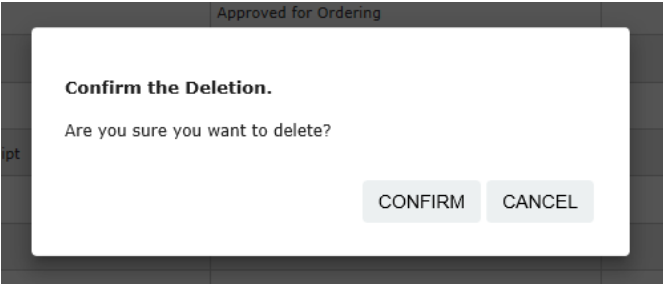
My Workspaces IACUC **Setup Review Cycle List** Back

Add a Review Cycle **Delete Review Cycle(s)**

3 result(s) found...

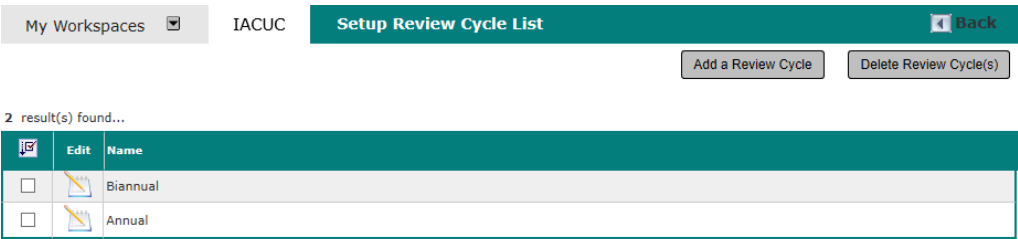
	Edit	Name
☐		Six Months
☐		Annual
☒		Biennial

A confirmation popup window displays.



Click **CANCEL** to return to the **Setup Review Cycle List** page without deleting the selected review cycle(s).

Click **CONFIRM** to delete the item(s) and return to the **Setup Review Cycle List** page. The review cycle(s) is(are) deleted.



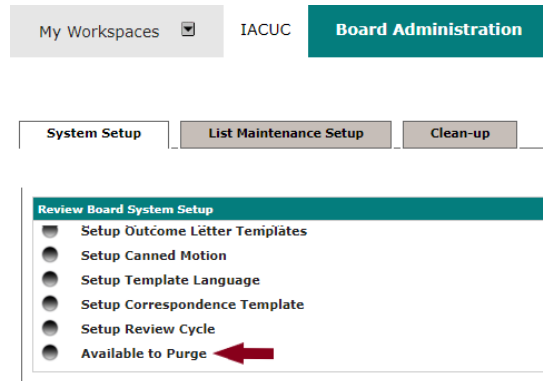
Available to Purge

The iRIS™ system allows for archive of closed studies where those studies:

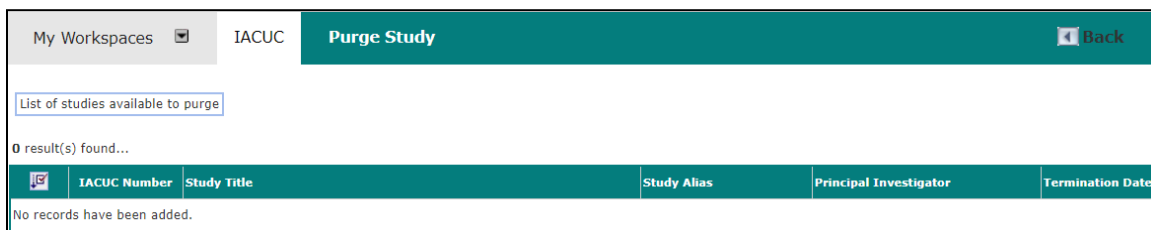
- are overseen by the IACUC board, AND
- are in a study status that has the Available to Archive flag turned on, AND
- have a study profile Termination Date that occurred three (3) years prior to the date the Available to Archive flag was set; in other words, a minimum of three (3) years must have passed since the Termination Date before the Available to Archive flag was turned on

Note that purged studies are removed from all study screens (Find a Study, My Studies, etc.), are no longer searchable and are no longer visible to any user but are not deleted from the database. Purged studies can be recovered from the database with the assistance of the institution's designated iMedRIS contact.

Navigate to IACUC Assistant > Review Board Administration > Available to Purge link.



The **Purge Study** page opens. Records that meet all three purge requirements are listed here.



In the example above no studies in the system meet the requirements to allow for purge, so no records are listed.

When a list of records appears here, a select checkbox is provided in the far-left column for each one and a **Purge Selected Studies** button populates in the upper right-hand corner of the page.

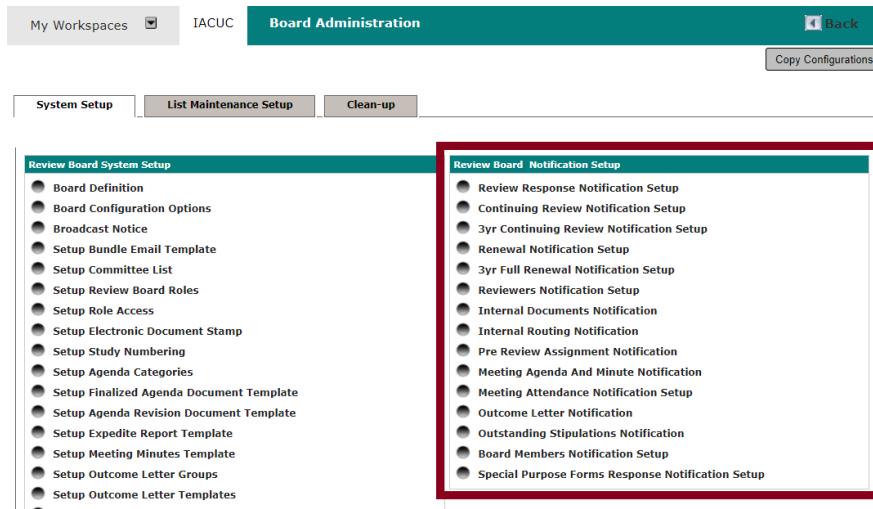
Select the checkbox(es) for the record(s) to be purged and click the **Purge Selected Studies** button.

A confirmation popup box appears. Click CANCEL to close the popup without purging the records. Click CONFIRM to complete the purge.

Note that once the CONFIRM button is clicked, this action cannot be undone.

Review Board Notification Setup

The **Review Board Notification Setup** panel, accessed via IACUC Assistant > Review Board Administration, provides links for configuration of various standardized notification types to be sent to applicable study personnel and board members.



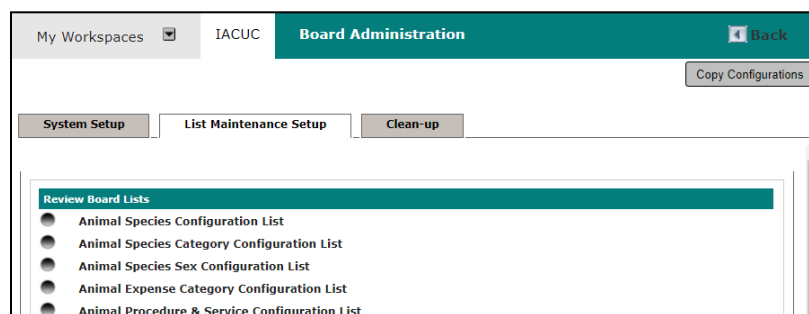
Notifications configured here are automatically sent to applicable personnel when study tasks (e.g., review, signoff, set meeting availability, etc.) are assigned, completed, or overdue.

See the IACUC Assistant – Review Board Administration: Notifications manual for details of IACUC RBA notification configuration and management.

List Maintenance Setup Tab

The iRIS™ system provides numerous picklists on system pages and forms. Some of these lists exist to save users the time and inconvenience of manually typing in frequently used data items. Other lists exist to enforce data validation requirements.

In the IACUC Assistant module, lists are managed on the **List Maintenance Setup** tab. To access this area, navigate to IACUC Assistant > Review Board Administration > **List Maintenance Setup** tab.



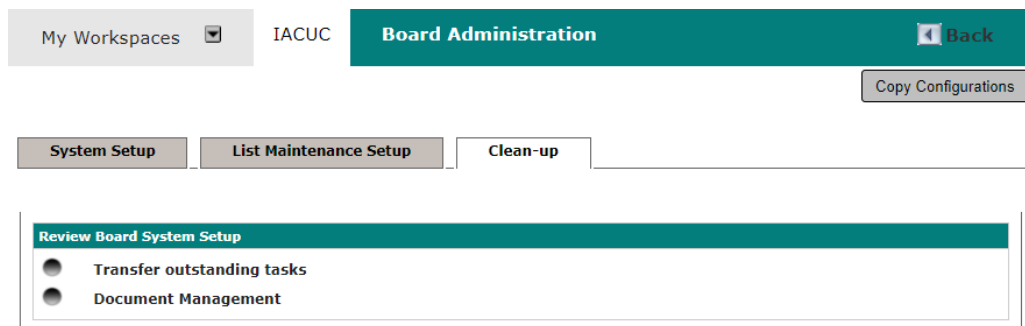
CAUTION: Note that many of the lists linked here are also available in the **List Maintenance Setup** tab under Animal Resource Center > Review Board Administration, where they are employed by institutions using the Animal Resource Center as a standalone module. Where an institution that employs either the IACUC Assistant module alone, or both the IACUC Assistant and Animal Resource Center modules for animal studies, these configuration lists must be set up and maintained via the List Maintenance Setup tab under IACUC Assistant. See

the IACUC Assistant – Animal Resource Center Integration Guide for more information about configuring a system to properly employ both the IACUC Assistant and Animal Resource Center modules.

See the IACUC Assistant – List Maintenance manual for details of list configuration processes and settings, as well as information about where the configured lists are employed in the iRIS™ system.

Clean-up Tab

The **Clean-up** tab under IACUC Assistant > Review Board Administration provides access to pages that allow the system administrator to transfer tasks among staff members and unlock orders for editing.

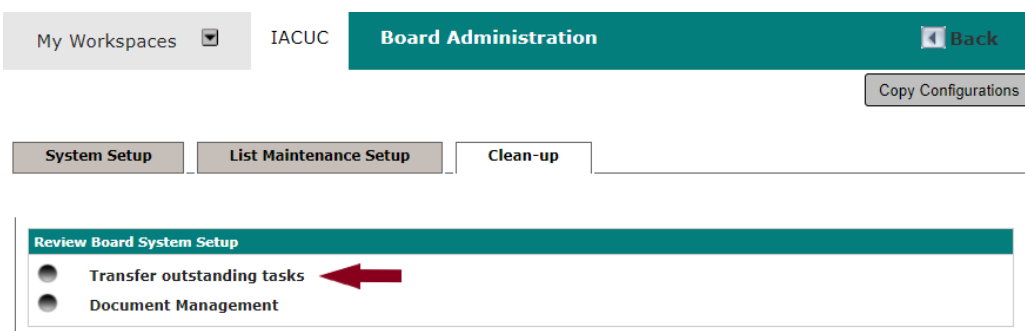


Transfer outstanding tasks

When a Coordinator leaves the institution, tasks assigned to that user must be reassigned to a different user in order to avoid any breaks in study processing continuity.

IMPORTANT: the iRIS™ user profile for the Coordinator whose tasks are being reassigned must still exist in the system, and that user must be designated as a Coordinator.

This process is completed on the **Transfer RB Tasks** page. To access the page, navigate to IACUC Assistant > Review Board Administration > Clean-up tab > **Transfer outstanding tasks** link.



The **Transfer RB Tasks** page opens, as shown below.

My Workspaces IACUC **Transfer RB Tasks** Back

Select the user that tasks are currently assigned to: --none-- Select the user who will accepts these tasks: --none--

	Study Title/ Task type
--	------------------------

Here, the System Administrator or designee can look up a Coordinator name, view tasks assigned to that Coordinator, and reassign them individually or in a group to one or more other, active Coordinators in the system.

Click in the **Select the user that tasks are currently assigned to** field to open a dropdown list of users assigned to the role of Coordinator.

My Workspaces IACUC **Transfer RB Tasks** Back

Select the user that tasks are currently assigned to: --none-- Select the user who will accepts these tasks: --none--

	Study Title/ Task type
--	------------------------

Click an item in the list to select the name of the Coordinator whose tasks are to be reassigned.

As shown below, all tasks currently assigned to the selected Coordinator populate in the **Study Title/ Task type** list.

My Workspaces IACUC **Transfer RB Tasks** Back

Select the user that tasks are currently assigned to: Glaser, Trevor, M.D. Ph.D. Select the user who will accepts these tasks: --none--

	Study Title/ Task type
☒	Conflict of Interest Reviewer Assignment
☒	Conflict of Interest Reviewer Assignment
☒	Conflict of Interest Reviewer Assignment

Select the checkbox(es) for the task(s) to be reassigned to a different Coordinator.

Note that in the example above all tasks are selected, but individual tasks can also be reassigned to different Coordinators by selecting a single task and repeating the process of reassignment multiple times.

Click in the **Select the user who will accepts these tasks** field to open a dropdown list of users currently assigned to the role of Coordinator.

My Workspaces ▾ IACUC **Transfer RB Tasks** Back

Transfer task to new user

Select the user that tasks are currently assigned to: Glaser, Trevor, M.D. Ph.D.

Select the user who will accepts these tasks:

	Study Title/ Task type
☒	Conflict of Interest Reviewer Assignment
☒	Conflict of Interest Reviewer Assignment
☒	Conflict of Interest Reviewer Assignment

Click an item in the list to select the name of the Coordinator to whom the selected task(s) is(are) to be reassigned, then click the **Transfer task to new user** button.

My Workspaces ▾ IACUC **Transfer RB Tasks** Back

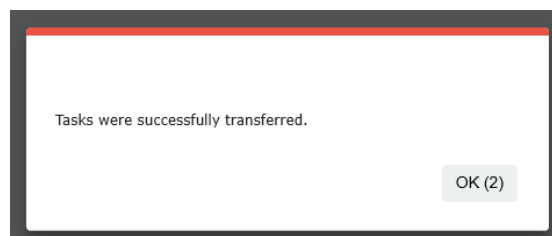
Transfer task to new user

Select the user that tasks are currently assigned to: Glaser, Trevor, M.D. Ph.D.

Select the user who will accepts these tasks: Medlock, Stephen

	Study Title/ Task type
☒	Conflict of Interest Reviewer Assignment
☒	Conflict of Interest Reviewer Assignment
☒	Conflict of Interest Reviewer Assignment

A confirmation popup briefly displays, then closes automatically when its countdown timer expires.



The reassigned tasks will now appear in the Workspace(s) of the new assignee(s).

Document Management

Study document version merge functionality is provided via IACUC Assistant > Review Board Administration > Clean-up tab > **Document Management** link.

My Workspaces IACUC **Board Administration** Back

Copy Configurations

System Setup **List Maintenance Setup** Clean-up

Review Board System Setup

- ☐ Transfer outstanding tasks
- ☒ Document Management

The link opens the **Find A Study** page, as shown below.

My Workspaces IACUC **Find a Study** Back

Find a Study Filters

Display Projects by: IACUC Number

Study Number:

Sponsor:

☐ Active ☐ Principal Investigator:

Department:

IACUC Number:

Study Status: All

Study Classification: All

Reference Number:

IACUC Expiration Date: -

IACUC Full Renewal Expiration: -

Reset Find Options

Find ...

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

Select	Study Status	IACUC Number	IACUC Expiration Date	Study Number	Principal Investigator	Sponsor
No Studies found that match the filter criteria						

The page provides numerous search options and filters. Studies can be searched by any combination of the fields in the **Find a Study Filters** section.

My Workspaces IACUC **Find a Study** Back

Find a Study Filters

Display Projects by: IACUC Number

Study Number:

Sponsor:

☐ Active ☐ Principal Investigator:

Department:

IACUC Number:

Study Status: All

Study Classification: All

Reference Number:

IACUC Expiration Date: -

IACUC Full Renewal Expiration: -

Reset Find Options

Find ...

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

Select	Study Status	IACUC Number	IACUC Expiration Date	Study Number	Principal Investigator	Sponsor
No Studies found that match the filter criteria						

Enter / select desired search criteria in the **Find a Study Filters** section and click the **Find** button to execute the search. More information about the search criteria fields is provided below.

Click the **Reset Find Options** button to reset all fields in the **Find a Study Filters** section.

The **Display Projects by** dropdown (red arrow in screenshot below) dictates whether search results will be listed by “Study Number”, “IACUC Number” or “IBC Number”.

Text entry fields are provided to search by full or partial **Study Number**, **Sponsor** name, **Department**, **IACUC Number** or **Reference** number (red arrows in screenshot below).

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

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

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

As shown below, the **Study Status** dropdown provides a picklist to filter the search by study status. Click an item in the list to select it.

IACUC Number:			
Study Status:			All
Study Classification:			Open
Reference Number:			Returned for Corrections
IACUC Expiration Date:			Pending Feasibility Review
			Feasibility Approved
			Feasibility Denied
			Approved
			Pending - Acceptance to Participate
			Draft
			Pending
			Pending - Submitted for Initial Review
			Closed to Accrual with follow-up
			Closed
			Suspended
			Inactive - Administratively Closed
			Pending - Acceptance from Site Investigator
			Pending - Completion Site Application
			Declined - Acceptance

Expiration Date	Study Number	Study Title	Principal Investigator

Note that the **Study Status** list is configurable under System Administration > List Configuration and Maintenance > System Setup tab > Setup Study Status link and will vary by institution. The list shown here may not be the same at every institution.

As shown below, the **Study Classification** dropdown provides a picklist to filter the search by study classification. Click an item in the list to select it.

Study Classification:			All
Reference Number:			Cardiology
IACUC Expiration Date:			Dermatology
			Neurology
			Orthopedics
			Pathology

Note that the **Study Classification** list is configurable under System Administration > List Configuration and Maintenance > Site List Setup tab > Study Classification link and will vary by institution. The list shown here may not be the same at every institution.

Calendar widgets are provided for searching by **IACUC Expiration Date** range and **IACUC Full Renewal Expiration** date range.

IACUC Expiration Date:			-		
IACUC Full Renewal Expiration:			-		

Feb 2020

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Available date range options are as follows:

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

Find a Study Results Section

As shown in the screenshot below, after search criteria and filters are applied and the **Find** button is clicked, results are displayed in the lower part of the **Find a Study** page.

The screenshot shows the 'Find a Study' interface. At the top, there are search filters under 'Find a Protocol Filters'. The 'Display Projects by' dropdown is set to 'IACUC Number'. Other filters include 'Study Number', 'Sponsor', 'Principal Investigator', 'Department', 'IACUC Number', 'Protocol Status' (set to 'Open'), 'Protocol Classification' (set to 'All'), 'Reference Number', and 'IACUC Expiration Date'. On the right, there are buttons for 'Advanced Find Options', 'Application Find Options', 'Reset Find Options', 'Find ...', and 'Download Result(s)'. Below the filters, it says '27 result(s) found...'. The results are displayed in a table with columns: Open, Protocol Status, IACUC Number, IACUC Expiration Date, Study Number, Protocol Title, Principal Investigator, and Sponsor. Two results are shown, both with 'Open' status.

Open	Protocol Status	IACUC Number	IACUC Expiration Date	Study Number	Protocol Title	Principal Investigator	Sponsor
	Open	IACUC-2019-044	03/08/2019		Mechanism of Muscle Wasting & Identification	Weeks, Janelle M.D., PhD	
	Open	IACUC-2019-057	03/15/2022		Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZIP4-mediated Cachexia in Pancreatic Cancer	Sindeep, Prithaya PhD	

Columns in the results section of the page are:

- Open** – click the icon in this column to open the **Document Management** page and proceed with merging document versions (see the Merging Document Versions subsection of this manual)
- Study Status** - current study status (e.g. Open, Pending, Draft, Completed)
- IACUC Number** – IACUC number assigned to the study, if any
- IACUC Expiration Date** – IACUC expiration date, if any

*Note that the title and contents of the **IACUC Number** and **IACUC Expiration Date** columns are dictated by the **Display Projects by** filter setting in the upper part of the **Find a Study** page, shown below.*

Find a Study Filters ⓘ

Display Projects by:

IACUC Number

Study Number:

Study Number

Sponsor:

IACUC Number

Active

Principal

Investigator:

Department:

IACUC Number:

Study Status:

All

Study Classification:

All

Reference Number:

IACUC Expiration Date:

-

IACUC Full Renewal Expiration:

-

Study Number - Study Number/Nickname given to the study in the Study Application

Study Title - Study Title entered in the Study Application

Principal Investigator - name of the Principal Investigator on the study

Sponsor –name of the Sponsor on the study

Merging Document Versions

When the desired study is listed in the results section of the Find a Study page, click the applicable icon in the Select column.

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

Select	Study Status	IACUC Number	IACUC Expiration Date	Alias	Principal Investigator	Sponsor
			IACUC Full Renewal Expiration	Study Title		
	Active	A12-020	07/25/2013	VA Merit: Arrestin Regulation of CRF1 Signaling	Hauger, Richard L	
				Arrestin Regulation of CRF1 Signaling: Mechanisms for Stress Resilience and PTSD		

The selected study is opened in the **Document Management** page.

My Workspaces ▼
IACUC
Document Management
Back

Study Status: Active
Study Title : Arrestin Regulation of CRF1 Signaling: Mechanisms for Stress Resilience and PTSD

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
Title:
Version #: . 0
Document Outcome: All
Approval Date: between
Expiration Date: between
Document Type: Documents Consents
Filter Documents

Select Root Document	Version	Title/ Category	Document Outcome	Approval Date	Expiration Date	File
	1.0 07/26/2012	12-020 Figure 1 ACORP Diagram				 32.44 KB
	1.0 11/13/2012	test *Revision modified by the IRB - VA				 12.68 KB

All version 1.0 study documents associated with the selected study are listed in a Root Documents table. Click the icon in the **Select Root Document** column for the applicable document.

All versions of the selected document populate, and the **Select Root Document** column is replaced with a **Select Document** column containing select checkboxes. **Prepare Changes**, **Select a Different Root Document** and **Filter Documents** buttons populate in the upper right corner above the table.

Prepare Changes
Select a Different Root Document
Filter Documents

Select Document	Version	Title/ Category	Document Outcome	Approval Date	Expiration Date	File
Selected Root Document	1.0 07/26/2012	12-020 Figure 1 ACORP Diagram				 32.44 KB
☒	1.1 07/26/2012	12-020 Figure 1 ACORP Diagram				 12.46 KB
☒	1.2 07/26/2012	12-020 Figure 1 ACORP Diagram				 12.46 KB

Click the **Select a Different Root Document** button to revert to the prior version of the Root Document table, where a different root document can be selected.

Select the checkbox(es) for all document versions to be merged with the root (version 1.0) document and click the **Prepare Changes** button.

Prepare Changes Select a Different Root Document Filter Documents						
Select Document	Version	Title /  Category	Document Outcome	Approval Date	Expiration Date	File
Selected Root Document	1.0 07/26/2012	12-020 Figure 1 ACORP Diagram				 32.44 KB
	☒ 1.1 07/26/2012	12-020 Figure 1 ACORP Diagram				 12.46 KB
	☒ 1.2 07/26/2012	12-020 Figure 1 ACORP Diagram				 12.46 KB

The selected documents are opened in a **Prepare Changes** popup window. If multiple versions of the same root document are chosen from the Root Documents table, all versions of that document are selected by default in the popup.

Prepare Changes ✕				
	Document Title	Current Version	Proposed Version	Category
☒	12-020 Figure 1 	1.0		ACORP Diagram 
☒	12-020 Figure 1	1.1	1. 1	ACORP Diagram ▼
☒	12-020 Figure 1	1.2	1. 2	ACORP Diagram ▼
☒	12-020 Figure 1	1.3	1. 3	ACORP Diagram ▼
☐	ACORP Diagram	1.1	1. 4	▼
☐	ACORP Diagram	1.2	1. 5	▼

Merge Documents

Columns in the popup are:

- **Document Title:** original name of the document, editable
- **Current Version:** current version of the document
- **Proposed Version:** suggested version of the document following the merge, editable
- **Category:** category to which the root document is assigned, editable

Any versions of the root document that were not chosen from the Root Document table also appear in the popup but are not selected by default. Click the applicable blank box(es) in the far-left column to select the additional document version(s) to be merged, as shown in the screenshot below.

Prepare Changes				
	Document Title	Current Version	Proposed Version	Category
☒	12-020 Figure 1	1.0		ACORP Diagram
☒	12-020 Figure 1	1.1	1. 1	ACORP Diagram
☒	12-020 Figure 1	1.2	1. 2	ACORP Diagram
☒	12-020 Figure 1	1.3	1. 3	ACORP Diagram
☒	ACORP Diagram	1.1	1. 4	
☒	ACORP Diagram	1.2	1. 5	

Merge Documents

Note that the documents to be merged can have different **Document Titles**.

Click the **Merge Documents** button. The **Prepare Changes** popup is updated with proposed merged document version details.

Prepare Changes						
View History	Version	Title/Category	Document Outcome	Approval Date	Expiration Date	File
	1.2 10/10/2012	12-020 Figure 1				 12.46 KB
		ACORP Diagram				
	1.1 02/21/2013	12-020 Figure 1				 13.91 KB
		ACORP Diagram				
	1.0 09/28/2012	12-020 Figure 1				 13.91 KB
		ACORP Diagram				

Cancel Confirm

Note that in the example shown above only the top three document versions were selected.

Click the icon in the **View History** column to preview document version history as it will appear after the merge is complete.

Click any document icon in the **File** column to open that version of the document in a separate, read-only window.

Click the **Cancel** button to cancel the merge and return to the pre-merge version of the **Prepare Changes** popup, as shown below.

	Document Title	Current Version	Proposed Version	Category
☒	12-020 Figure 1	1.0		ACORP Diagram
☒	12-020 Figure 1	1.1	1. 1	ACORP Diagram
☒	12-020 Figure 1	1.2	1. 2	ACORP Diagram
☒	12-020 Figure 1	1.3	1. 3	ACORP Diagram
☐	ACORP Diagram	1.1	1. 4	
☐	ACORP Diagram	1.2	1. 5	

Merge Documents

Click the **Confirm** button to complete the merge. A confirmation popup appears.

Information (ATT)

Confirm the action of reorganizing the documents.

Are you sure you want to reorganize the documents?

CONFIRM CANCEL

Click **CANCEL** to close the confirmation popup and return to the **Prepare Changes** popup.

Click **CONFIRM** to complete the merge. The selected versions are merged and a “Documents have been reorganized” countdown popup briefly appears. The countdown popup closes and an updated version of the Root Documents table is loaded.