



## IRB ASSISTANT

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*Analyst Dashboard*

Version 11.02

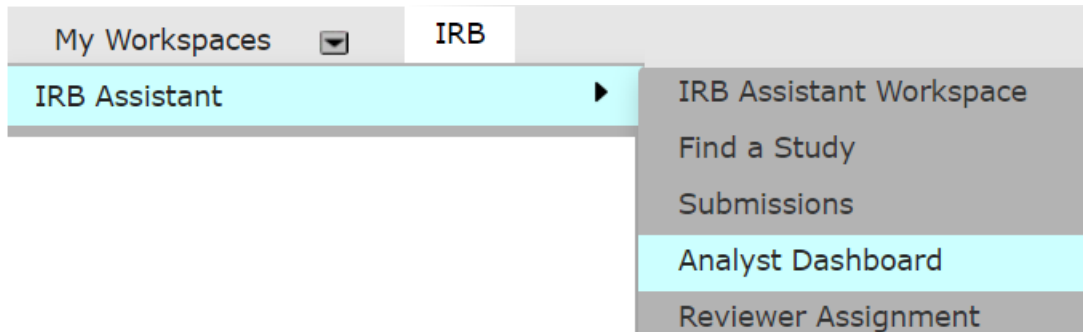
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# IRB Assistant – Analyst Dashboard

## Introduction

This manual will guide you through the process of using the **Analyst Dashboard** menu item in the **IRB Assistant** group on the homepage of your iRIS software. The **Analyst Dashboard** is a tool available for Review Board Coordinators where analyst assignments can be accessed. Assignments to other analysts can also be accessed from here, and submissions related to a specific meeting date can be reviewed.



All your complete and incomplete Analyst Assignments can be viewed within your dashboard. When accessing the **Analyst Dashboard**, you will initially be directed to the Analyst Assignment view. The Analyst Dashboard will be organized into different queues based on the Submission Process Type selected by the board: **Submission Assigned to you (No Review Process/ Process Administratively)**, **Submission Assigned to you**, **Submissions awaiting Study Team**, **Submissions awaiting Exempt or Administrative Review**, **Submissions awaiting Expedited Review**, **Submissions awaiting Designated Reviewer**, and **Submissions awaiting Full Scheduling Review**.

Here is a list of the different sections that the Analyst Dashboard will display:

**Submission Assigned to you (No Review Process/Process Administratively):** All submissions assigned to the logged in user as an Analyst and have not been assigned a review process or a “Process Administratively” review process, will appear in this queue.

Submissions Assigned to you (No Review Process/Process Administratively) [ Open Search ]											
6 result(s) found... 1 - 6											
Open	★	Study Status	Ref Number	IRB Number	Classification	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	Department
				IRB Expiration Date			Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Submission Assigned to you:** All submissions that are assigned to the logged in user as an Analyst and have been assigned a review process will appear in this queue.

Submissions Assigned to you [ Open Search ]											
12 result(s) found... 1 - 10											
Open	★	Study Status	Ref Number	IACUC Number	Classification	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	Department	
				IACUC Expiration Number			Form Type	Agenda Date	Assigned Analyst Date		Reviewers Complete

**Awaiting Responses from Study Team:** All submissions that are assigned to the logged in user as an Analyst but do not currently require the Analyst to carry out a review will appear in this queue.

Submissions awaiting Response from Study Team [ Open Search ]											
0 result(s) found... 0 - 0											
Open	★	Study Status	Ref Number	IRB Number	Classification	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	Department
				IRB Expiration Date			Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Submissions awaiting Prereview Screening:** All submissions that are awaiting a Prereview process, regardless of the Analyst on that submission will appear in this queue.

Submissions awaiting Pre-Review Screening [ Open Search ]											
0 result(s) found... 0 - 0											
Open	★	Study Status	Ref Number	IRB Number	Classification	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	Department
				IRB Expiration Date			Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Submissions awaiting Administrative Review:** All submissions that are awaiting an Exempt or Administrative review process, regardless of the Analyst on the submissions will appear in this queue.

Submissions awaiting Administrative Review [ Open Search ]											
186 result(s) found... 1 - 10											
Open	★	Study Status	Ref Number	IACUC Number	Classification	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	Department
				IACUC Expiration Number			Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Submissions awaiting Expedited Review:** All submissions that are awaiting an Expedited or Emergency Use review process, regardless of the Analyst on the submissions will appear in this queue.

Submissions awaiting Expedited Review [ Open Search ]												
23 result(s) found... 1 - 10												
Open	★	Study Status	Ref Number	IRB Number	Classification	Codes	Review Process	Board Received Date	Committee	Assigned Analyst	Principal Investigator	Department
				IRB Expiration Date			Form Type	Agenda Date		Assigned Analyst Date	Reviewers Complete	

**Submissions awaiting Designated Reviewer:** All submissions that are awaiting a Designated Reviewer or Facilitated review process, regardless of the Analyst on the submissions will appear in this queue.

Submissions awaiting Designated Reviewer [ Open Search ]											
12 result(s) found... 1 - 10											
Open	★	Study Status	Ref Number	IRB Number	Classification	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	Department
				IRB Expiration Date			Form Type	Agenda Date		Assigned Analyst Date	

**Submissions awaiting Full Committee Scheduling Review:** All submissions that are awaiting a Full Committee Scheduling review process, regardless of the Analyst on the submissions will appear in this queue.

Submissions awaiting Full Committee Scheduling Review [ Open Search ]								
1 result(s) found... 1 - 1								
Open	Study Status	Reference Number	Review Process	Board Received Date	Committee	Assigned Analyst	Principal Investigator	
		IRB Expiration Date	Form Type	Agenda Date		Assigned Analyst Date	Reviewers Complete	

To the left of the page you can switch screen views, view the agenda for different meeting dates, and view a 30-day calendar. The Switch View area contains a link to the Submission Workspace which will allow the you to return to the assigned analyst workspace. This view will allow you to see your current analyst assignments with the ability to filter the results for a specific date.

My Workspaces ▾ IRB
Analyst Dashboard
⏪ Back

Switch View

Submission Workspace

Upcoming Committee Meeting

August 07, 2019

August 12, 2019

August 14, 2019

August 19, 2019

August 21, 2019

Past Committee Meeting

May 13, 2019

May 15, 2019

May 20, 2019

May 22, 2019

May 27, 2019

May 29, 2019

August 2019

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	30	31

Filter by Committees: -- All -- ▾

Submissions Assigned to you (No Review Process/Process Administratively) [ Open Search ]
⚙️

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

Open	Study Status	Reference Number	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	
		IRB Expiration Date		Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	
No Items To Review!								

Submissions Assigned to you [ Open Search ]
⚙️

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

Open	Study Status	Reference Number	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	
		IRB Expiration Date		Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	
No Items To Review!								

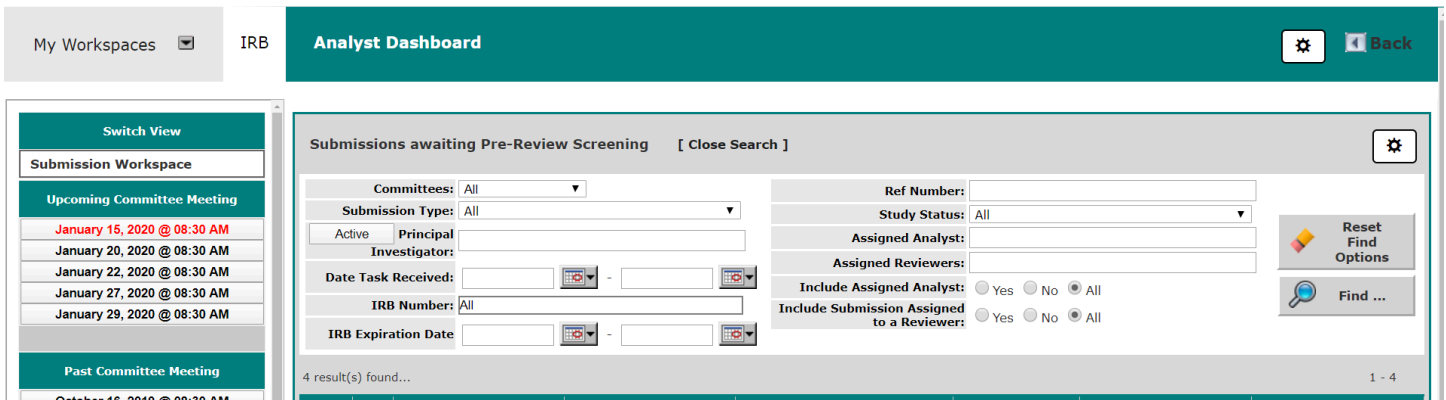
## Analyst Assignment


The **Submission Workspace** link displays all analyst assignments for the review board. This includes your own assignments as well as assignments for the other analysts that have been assigned a submission. The search criteria at the top of each of the queues will allow you to search for specific assignments. The **Submission Workspace** page contains the table shown below containing all analyst assignments for the board. The page also contains search and view options that can help you identify current analyst assignments as well as previously completed assignments. You can click the **Close Search** button to hide the search criteria. The icon in the upper-right corner of the page will allow the Task List queue to display on the entire page by hiding the calendar section. You may sort the submissions by any of the columns from **IRB Number** to **Assigned Analyst** by clicking on the column. You may then indicate the sort order alphabetically from A-Z or Z-A.

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The filter options allow you to easily find and access any submission that has been assigned. The Filter the Awaiting Submissions option will allow the user to apply the filter to the awaiting submissions sections: **Submission Type** contains a list of submission form types. The search criteria at the top of each queue will allow you to search for specific submissions. You can select the **Close Search** link to hide the search criteria or select the **Open Search** link to show the search criteria. The filter options allow you to easily find and access any submissions that have been assigned. Once you have applied the filter, the **Find** button must be selected to apply the filter(s) to the queue.



**Click to open** – Access the submission and all the components by clicking the  icon in the open column. Please see the **IRB Assistant - Submission Processing** manual for additional information.

## Committee Meetings

The **Upcoming Committee Meeting** area displays the next upcoming meetings, with the closest meeting in red. From this view, you can access submissions placed on a particular meeting date, and view/edit the setup for the meeting. (Please see the IRB- Meetings manual for additional information.)

You will be able to view different meetings by clicking on any meeting date underneath the **Upcoming Committee Meetings** or **Past Committee Meetings** section.

Items to be Reviewed at Committee 1 Meeting : ◀ 07/24/2019 ▶

Show the Finalized Agenda

Submission Review validation

<b>Meeting Attendance</b>	
Call to Order	Old/Unfinished business items are not applicable to this meeting.
Old Business	
New Business	
Miscellaneous	
Closing Comments	N/A
Motion	

<b>Review Documents</b>	<b>View File</b>	<b>Title</b>
	No documents have been associated with this agenda	

Meeting Start Time:  :  AM ▾ Meeting End Time:  :  AM ▾ Meeting Chair:  ▾

**Initial Reviews** - 1 Submissions

Order	Click to open	Reference Number	COI	Letters	Outcome	Type	Principal Investigator	Reviewer(s)	Date Board Received
1		<i>Baylor Demonstration application</i>							
		IRB-19-188-NEW-1.0			Approved	Submission Correction for Initial Review Submission Form	Investigator, John	Primary Luke Reviewer, Ph.D	07/24/2019 12:41:39 PM PDT

## Analyst Specific Tasks

The **Analyst Assignment** home screen task populates when you have been assigned as an analyst. The task will stay on your home screen until the task has been completed. Additionally, you may receive an email notification indicating that you have an analyst assignment. Opening this task navigates you to the General Information tab within submission processing.

All Tasks
Outstanding
Completed
⚙️

All Tasks

Study Tasks

Project Tasks

Task List: Analyst Assignment ▾

1 result(s) found... 1 - 1 ▶

Click to open	Task Type	Received	Description
	Analyst Assignment	5/20/2019 11:00 AM PDT	Admin Admin admin Mr, B.S. Brig. Gen. has been assigned as the analyst.

1 result(s) found... 1 - 1 ▶

The **Submission Reviewers Complete** notification populates under the **All Tasks- Outstanding** home screen when an assigned reviewer has completed their reviewer checklist. Additionally, you may receive an email notification indicating that the reviewer has completed their checklist. Opening this task navigates you to the Pre-Review Screening tab within submission processing.

The screenshot shows the 'All Tasks' section with the 'Outstanding' tab selected. The 'Task List' dropdown is set to 'Submission Reviewers Complete'. Below the navigation tabs, there is a table with one row of task data.

Click to open	Task Type	Received	Description
	Submission Reviewers Complete	02/04/2019 01:58 PM PST	All reviewers completed the review of the submission.

The **Internal Submission Routing Signoff** notification will populate under the **All Tasks- Outstanding** home screen when all internal routing for this submission is complete. Additionally, you may receive an email notification indicating that all internal routing signoffs have been completed. Opening this task navigates you to the Internal Submission Routing tab within submission processing.

The screenshot shows the 'All Tasks' section with the 'Outstanding' tab selected. The 'Task List' dropdown is set to 'Internal Submission Routing Signoff'. Below the navigation tabs, there is a table with one row of task data.

Click to open	Task Type	Received	Description
	Internal Submission Routing Signoff	03/05/2019 04:06 PM PST	Admin Admin admin Mr, B.S. Brig. Gen. has been assigned to Administratively review the submission.

The **Outcome Letter Signoff** notification will populate under the **All Tasks- Outstanding** when all signatures on an **Outcome Letter** for this submission have been collected. Additionally, you may receive an email notification indicating that all Outcome Letter signatures have been completed. Opening this task navigates you to the Outcome Letter tab within submission processing.

The screenshot shows the 'All Tasks' section with the 'Outstanding' tab selected. The 'Task List' dropdown is set to 'Internal Submission Routing Signoff'. Below the navigation tabs, there is a table with one row of task data.

Click to open	Task Type	Received	Description
	Internal Submission Routing Signoff	04/12/2019 01:56 PM PDT	Admin Admin admin Mr, J.D. Brig. Gen. has been assigned to Administratively review the submission.