



PACS Module Training Course Catalog and Calendar

Prepared by PACS Training Lead: Kelly Kowalski
Reviewed by PACS Training Focus Group 10/3/2016

Agreements

Course Name: AGR 1: Submit/Route an Agreement (Web-Ex Instructor Led Course)

This course is for Principal Investigators. (User Role: Principal Investigator)

Course Description: In this 60 minute instructor led web-ex session you will learn the key activities related to submitting an agreement or an amendment for routing and approvals. The session will begin with a brief navigation demonstration followed by a demonstration on how to submit an agreement and all related key activities. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 1, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 8, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 21, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 28, 2016	2:00 p.m. – 3:00 p.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the Agreements Module
 - Explore “My Inbox”
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- AGR Submit an Agreement
 - Create, Edit and Submit an Agreement
 - Create, Edit and Submit an Amendment
 - Respond to a Reviewer’s Clarification Request
- Q & A Session

Course Name: AGR 2: Administration of Agreements (Decentralized) (Web-Ex Instructor Led Course)

This course is for Administrative Staff. (User Role: Agreements Reviewer)

Course Description: This 60 minute instructor led web-ex session is designed specifically for the decentralized campuses including ESF and Downstate to learn the key activities related to the administration of an agreement or an amendment. This session will begin with a brief navigation demonstration followed by illustrated instructions on how to administer an agreement and all related key activities to permit you to submit, route and approve an agreements on campus. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 2, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 7, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 17, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 29, 2016	9:00 a.m. – 10:00 a.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the Agreements Module
 - Explore "My Inbox"
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- AGR Administrator for Decentralized Campuses including ESF and DMC Demonstration
 - Create, Edit and Submit an Agreement
 - Create, Edit and Submit an Amendment
 - Respond to a Reviewer's Clarification Request
 - Review all Agreements Assigned to your Agreements Office
 - Assign ownership of an Agreement
 - Manage and Track Reviews
 - Activate, Edit, or Terminate an Agreement
 - Approve an Amendment
 - Request Clarification from PI
- Q & A Session

Course Name: AGR 3: Administration of Agreements (Centralized) (Web-Ex Instructor Led Course)

This course is for Administrative Staff. (User Role: Agreements Reviewer)

Course Description: This 60 minute instructor led web-ex session is designed to allow the centralized campuses to learn the key activities related to the administration of an agreement or an amendment. This session will begin with a brief navigation demonstration followed by illustrated instructions on how to administer an agreement and all related key activities to permit you to submit, route and approve an agreement, as well as how the module will interact with the Office of Grants & Contracts Administration, central office. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 3, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 10, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 16, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 18, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 30, 2016	9:00 a.m. – 10:00 a.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the Agreements Module
 - Explore “My Inbox”
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- AGR Administrator for Centralized Campuses Demonstration
 - Create, Edit and Submit an Agreement
 - Create, Edit and Submit an Amendment
 - Manage Ancillary Reviews
 - Respond to a Reviewer’s Clarification Request
- Q & A Session

Conflict of Interest (COI)

Course Name: COI 1: Submit a Disclosure (Web-Ex Instructor Led Course)

This course is for Principal Investigators. (User Role: COI Discloser)

Course Description: This 60 minute instructor led web-ex session is designed to allow the campus principal investigators, faculty and students to learn the key activities related to submitting a conflict of interest (COI) disclosure. The session will begin with a brief navigation demonstration followed by a demonstration on how to submit a disclosure and all related key activities. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 1, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 9, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 14, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 17, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 22, 2016	9:00 a.m. – 10:00 a.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the COI Module
 - Explore “My Inbox”
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- COI Disclosure Demonstration
 - Submit and Update an Annual Certification
 - Return to Submitter
 - Respond to Clarification or Change Request
 - Review and Respond to a Management Plan
- Q & A Session

Course Name: COI 2: Administer a Disclosure and Committee Reviews (Web-Ex Instructor Led Course)

This course is for Administrative Staff and Committee Members (User Roles: COI Administrator, COI Monitor, COI Committee Member)

Course Description: This 60 minute instructor led web-ex session is designed to allow the campus administrative staff to learn the key activities related to the administration of a disclosure and committee reviews. The session will begin with a brief navigation demonstration followed by a demonstration on how to complete these key activities. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 2, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 10, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 15, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 18, 2016	2:00 p.m. – 3:00 p.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the COI Module
 - Explore “My Inbox”
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- COI Administrator/Monitor Demonstration
 - Review Annual Certifications
 - Record and Complete your Administrative Review
 - Create and Upload a Management or Mitigation Plan
 - Prepare and Send Correspondence to COI Discloser
 - Respond to Clarification or Change Request
 - Monitor Management Plans
 - View Monitor Report
 - Indicate Management or Mitigation Plan is Satisfied
- COI Committee Members Demonstration
 - Review and Make Determinations on Certifications
 - Designated Reviewer Activities
- Q & A Session

Institutional Review Board (IRB)

Course Name: IRB 1: Submit a Study (Web-Ex Instructor Led Course)

This course is for Principal Investigators, Students, Faculty, Clinical Coordinators, and Administrative Staff (User Role: Study Staff)

Course Description: This 60 minute instructor led web-ex session is designed to allow the principal investigator, study staff and students to learn the key activities related to submitting a new study involving Human Subjects. The session will begin with a brief navigation demonstration followed by a demonstration on how to build, submit, route and approve a study and all related key activities. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 3, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 7, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 14, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 21, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 28, 2016	9:00 a.m. – 10:00 a.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the IRB Module
 - Explore "My Inbox"
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- IRB Study Staff Demonstration
 - Create, Edit and Submit a Study
 - Respond to a Clarification Request
 - Submit Continuing Review
 - Submit Modifications
- Q & A Session

**Course Name: IRB 2: Administer a Study
(Web-Ex Instructor Led Course)**

This course is for Administrative Staff. (User Roles: IRB Coordinator, IRB Director)

Course Description: This 60 minute instructor led web-ex session is designed to allow the IRB administrative staff such as IRB Directors and IRB Coordinators to learn the key activities related to the administration of a study. This session will begin with a brief navigation demonstration followed by a demonstration on how to administer a study and all related key activities. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 4, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 8, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 15, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 29, 2016	2:00 p.m. – 3:00 p.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the IRB Module
 - Explore “My Inbox”
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- IRB Coordinator/Director Demonstration
 - Assign Coordinators
 - Assign Designated Reviewers
 - Submit and Edit Pre-Review
 - Request Clarifications
 - Assign and Submit to Committee Meeting
 - Administer Committee Agenda
 - Finalize Study Documents
 - Prepare Study Letter
 - Send Determination Letter
 - Suspend and Terminate Study
 - Create Committees and Meetings
- Q & A Session

Course Name: IRB 3: IRB Committee Administration (Web-Ex Instructor Led Course)

This course is for Committee Members and Administrative Staff. (User Roles: IRB Committee Administrator, IRB Committee Chair)

Course Description: This 60 minute instructor led web-ex session is designed to allow the centralized campuses to learn the key activities related to the administration of IRB Committee activities. This session will begin with a brief navigation demonstration followed by a demonstration on how to administer the IRB Committee and all related key activities. The session will conclude with a question and answer session.

Course Offerings:

Date	Time	Registration
November 4, 2016	2:00 p.m. – 3:00 p.m.	Click here to register
November 9, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 16, 2016	9:00 a.m. – 10:00 a.m.	Click here to register
November 30, 2016	2:00 p.m. – 3:00 p.m.	Click here to register

Course Topics: (60 minute session)

- Brief Introduction
- Navigation Demonstration
 - How to Login to the IRB Module
 - Explore “My Inbox”
 - Obtain Online Help
 - Explore the Workspace
 - Navigate through the SmartForm pages
 - Access Reports
- IRB Committee Members Demonstration
 - Assign Studies to Meeting
 - Assign Reviewers to Meetings
 - Prepare and Send Agenda to Members
 - Edit Meeting Attendance
 - Remove Studies from Agenda
 - Reassign Submissions to a Later Date
 - Review Required Modifications
 - Convene the Meeting
 - Administer the Meeting Minutes Template
 - Submit Committees Review Decision
 - Attach Relevant Checklists
- Q & A Session

Monday Oct 31	Tuesday Nov 1	Wednesday Nov 2	Thursday Nov 3	Friday, Nov 4
NO SESSIONS	AGR 1: Submit an Agreement (9:00 am – 10:00 am)	AGR 2: Administration of Agreements (Decentralized) (9:00 am – 10:00 am)	AGR 3: Administration of Agreements (Centralized) (9:00 am – 10:00 am)	IRB 2: Administer a Study (9:00 am – 10:00 am)
NO SESSIONS	COI 1: Submit a Disclosure (2:00 pm - 3:00 pm)	COI 2: Administer a Disclosure and Committee Reviews (2:00 pm - 3:00 pm)	IRB 1: Submit a Study (2:00 pm - 3:00 pm)	IRB 3: IRB Committee Administration (2:00 pm - 3:00 pm)
Monday Nov 7	Tuesday Nov 8	Wednesday Nov 9	Thursday Nov 10	Friday, Nov 11
IRB 1: Submit a Study (9:00 am – 10:00 am)	IRB 2: Administer a Study (9:00 am – 10:00 am)	IRB 3: IRB Committee Administration (9:00 am – 10:00 am)	AGR 3: Administration of Agreements (Centralized) (9:00 am – 10:00 am)	NO SESSIONS
AGR 2: Administration of Agreements (Decentralized) (2:00 pm - 3:00 pm)	AGR 1: Submit an Agreement (2:00 pm - 3:00 pm)	COI 1: Submit a Disclosure (2:00 pm - 3:00 pm)	COI 2: Administer a Disclosure and Committee Reviews (2:00 pm - 3:00 pm)	NO SESSIONS
Monday Nov 14	Tuesday Nov 15	Wednesday Nov 16	Thursday Nov 17	Friday, Nov 18
COI 1: Submit a Disclosure (9:00 am – 10:00 am)	COI 2: Administer a Disclosure and Committee Reviews (9:00 am – 10:00 am)	IRB 3: IRB Committee Administration (9:00 am – 10:00 am)	AGR 2: Administration of Agreements (Decentralized) (9:00 am – 10:00 am)	AGR 3: Administration of Agreements (Centralized) (9:00 am – 10:00 am)
IRB 1: Submit a Study (2:00 pm - 3:00 pm)	IRB 2: Administer a Study (2:00 pm - 3:00 pm)	AGR 3: Administration of Agreements (Centralized) (2:00 pm - 3:00 pm)	COI 1: Submit a Disclosure (2:00 pm - 3:00 pm)	COI 2: Administer a Disclosure and Committee Reviews (2:00 pm - 3:00 pm)
Monday Nov 21	Tuesday Nov 22	Wednesday Nov 23	Thursday Nov 24	Friday, Nov 25
AGR 1: Submit an Agreement (9:00 am – 10:00 am)	COI 1: Submit a Disclosure (9:00 am – 10:00 am)	NO SESSIONS	NO SESSIONS	NO SESSIONS
IRB 1: Submit a Study (2:00 pm - 3:00 pm)	NO SESSIONS RF CO Meeting	NO SESSIONS	NO SESSIONS	NO SESSIONS
Monday Nov 28	Tuesday Nov 29	Wednesday Nov 30	Thursday Dec 1	Friday, Dec 2
IRB 1: Submit a Study (9:00 am - 10:00 am)	AGR 2: Administration of Agreements (Decentralized) (9:00 am – 10:00 am)	AGR 3: Administration of Agreements (Centralized) (9:00 am – 10:00 am)	NO SESSIONS	NO SESSIONS
AGR 1: Submit an Agreement (2:00 pm – 3:00 pm)	IRB 2: Administer a Study (2:00 pm - 3:00 pm)	IRB 3: IRB Committee Administration (2:00 pm - 3:00 pm)	NO SESSION	NO SESSIONS