

**Click® IACUC Researcher’s Quick Reference**

[Before You Create a Protocol 2](#_Toc400968154)

[Create a Research Team 3](#_Toc400968155)

[Check for Existing Building Blocks 3](#_Toc400968156)

[Create Building Blocks 4](#_Toc400968157)

[Create and Submit a Protocol 5](#_Toc400968158)

[Respond to Reviewer Requests 6](#_Toc400968159)

[Create and Submit a Follow-On Submission 7](#_Toc400968160)

[Navigation and Basic Tasks 8](#_Toc400968161)

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| Before You Create a Protocol |
| Plan out your protocol:  * Summarize the research (science), reasons for performing the research, and benefits from it. * Determine the experiments and the number of animals required. * Determine the procedures you will perform and the substances required for your experiments. * Identify any supporting documents to include in your protocol, such as, flowcharts, explanations of the science, grant applications, and other information explaining or justifying your research.  Set up building blocks: The diagram below shows the concept of building blocks. Once they are set up, you can create your protocol.   * [Create a research team](#_Create_Research_Team) for the substances, procedures, and protocols you create. * Check the IACUC standard library for the procedures and substances required for your protocol experiments (see [Check for Building Blocks](#_Check_for_Building)). If not in the library:   [Create the missing substances](#_Create_a_Procedure)  [Create the missing procedures](#_Create_a_Research_1)  **Create protocols with experiments\***    \*Experiments can have one or more team or standard procedures  **Create procedures\***    \*Team procedures can have one or more team or standard substances  **Substances & Procedures Library**  **Substances**  **Procedures**    **Substances**  **Research Team**  **Procedures**  **Protocols**  **Create substances**  **Substance**  **Substance**  **Substance**  **Procedure**  **Substance**  **Substance**    **Protocol Experiment**  **Procedure**  **Substance**  **Substance**  **Procedure**  **Substance** |

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| Create a Research Team | |
| As a member of a research team, you can create substances, procedures, and protocols for your research team. When you create a protocol, your research team members appear on the protocol by default. | |
| **2**      **3**      **1** | Create Research Team |
| 1. From My Inbox, click **Create Research Team**. 2. Type a name for the research team and select the team’s PI.   **Note:** If you are not the PI, add yourself as a team member if you will create team procedures  and substances.   1. Complete the rest of the page and click **OK**.   You are taken to the research team workspace page. |

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| Check for Existing Building Blocks | |
| Check the system to see if there are IACUC standard building blocks that you can use in your protocols. | |
| 1    **3b**      2      3a  3 | Check for Building Blocks |
| 1. From My Inbox, click your research team on the left. 2. In the research team workspace, click the **Procedures** tab and check for the procedures you need. Do the same for substances (on Substances tab). If missing, see [Create Building Blocks](#_Create_Building_Blocks). 3. If the building block exists, review its details:    1. On the Procedures or Substances tab, click  the item name.    2. In the item’s workspace,  click **View Procedure** or **View Substance**. |

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| Create Building Blocks | |
| After you have checked the system for IACUC standard building blocks, create any that are required for your protocols. | |
| 2      3        1 | Create a Substance or Procedure |
| 1. From the research team workspace, click **Create Substance** or **Create Procedure**.   **Note:** Create the substances you  will use in your procedures before creating the procedures.   1. Complete the pages. If more than one page, click **Continue** to move to the next page. 2. When done, click **Finish**.   You are taken to the research team’s substance or procedure  workspace page. |

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| Create and Submit a Protocol | |
| Once all the building blocks are set up, you are ready to create your protocol. | |
| 2      4      3a    **3b**    1      5    6 | Create a Protocol |
| 1. From the research team workspace or My Inbox page, click **Create Protocol**. 2. Complete the pages. Click **Continue** to move to the  next page. 3. Pay attention to the  following pages:    1. **Protocol Team Members:** Add each person who will edit the protocol. Do not add the PI here.    2. **Experiments:** When you add an experiment, select the procedures that apply to all animals (common procedures) and those that apply to some animals or  are used differently across animals (variable procedures). 4. On the final page, click **Finish**.   You are taken to the protocol workspace page. You can continue to edit the protocol (Edit Protocol button) until you submit it for review. |
| Submit a Protocol for Review |
| 1. From the protocol workspace,  click **Submit**. 2. Click **OK** to agree to the statement and submit the protocol for review.   You can log off the system (top right). |

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| Respond to Reviewer Requests | | |
| If a reviewer has questions or requires you to change your submission, you will receive an e-mail indicating this.  Review the request details and then respond to the request. | | |
| 1      8        **2**      **3**      4      **6**      5      9      **10**      7 | | Review the Request Details |
| 1. Click the e-mail link to open  the submission.   If you no longer have the e-mail,  see [Open a Submission](#_Open_a_Submission) and then [View History](#_View_Certification_History) to see reviewer comments.   1. On the History tab, find the “Clarification by…Requested” activity and read the comments. 2. If the reviewer added reviewer notes, click the **Reviewer Notes** tab and go to [Respond to Reviewer Notes](#_Respond_to_Reviewer). If not, go to [Submit Response](#_Submit_Response). |
| Respond to Reviewer Notes |
| For each reviewer note that requires  a response:   1. To edit the protocol in response to the reviewer note, click the Jump To link. 2. From the protocol page or the Reviewer Notes tab, click the **Click here to respond** link. 3. Select a response and explain your response in the text box. 4. Click **OK**. If on a protocol page, exit the protocol when done.   Go to [Submit Response](#_Submit_Response). |
| Submit Response |
| 1. On the protocol workspace, click **Submit Response**. 2. In the Comments box, explain your response to the reviewer. 3. Click **OK**.   You can log off the system (top right). |
| Create and Submit a Follow-On Submission | | |
| If you need to make changes to an approved protocol or submit an annual review, follow these steps. | | |
| 2    **1**      **4**      **5**        **7**      6        3 | Create a Follow-On Submission | |
| 1. From My Inbox, click the research team on the left. 2. Select the name of the  approved protocol. 3. On the left, click the  “**Create…”** button. 4. Complete the pages. Click **Continue** to move to the  next page. 5. When done, click **Exit** and save changesor **Finish** on the  final page.   You are taken to the submission’s workspace page. You can continue to edit the submission (“Edit…” button) until you submit it for review. | |
| Submit Follow-On Submission  for Review | |
| 1. From the follow-on submission’s workspace, click **Submit**. 2. Click **OK** to agree to the statement and submit it for review.   You can log off the system (top right). | |

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| Navigation and Basic Tasks | |
| When you first log in, you will be on the My Inbox page. This topic lists where to find submissions and the basic tasks you will perform. | |
| 1      2      3        5      **4**      6      7          8 | Where do I find? |
| From My Inbox, you can find:   1. **Submissions** that require you to take action. 2. Your **research teams**. 3. **Actions** you can perform such as create a protocol. |
| What do I do? |
| 1. Review the state of submissions in My Inbox. The state gives a clue as to what to do next. For example, “Pre-Submission” means you haven’t submitted the protocol. You can finish and submit it for review. |
| Open a Submission |
| 1. From My Inbox, click the submission name. 2. The submission  workspace opens. |
| View History |
| 1. From the submission workspace, click the **History** tab. 2. The history lists the activity taken on a submission including any comments, attachments, or correspondence added. |

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| **9**      10        11      12      13      15      **14** | Find Previous Submissions |
| 1. On the left, click **Submissions**. 2. Click the appropriate tab to see your submissions:    * + - **In-Review:** All submissions undergoing IACUC review        - **Active:** All approved submissions        - **Archived:** All discarded and closed submissions        - **All Submissions:** All submissions, in any state   To find specific data, see  [Filter Data](#_Filter_Data). |
| Filter Data |
| Many pages contain tables that you can filter to show specific data.   1. Select the column to filter by. 2. Type the beginning characters for the items you want to find. You can also type a % symbol as a wildcard before the characters. Examples:    * + - 71 shows all items  beginning with 71        - %71 shows all items containing 71 3. For operators you can type in the text box, click the Help icon. 4. Click **Go** to apply the filter. 5. To combine multiple filter criteria, click **Advanced** and then click **Add Another Row**. |

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