**Create and Submit an Amendment**



**Work Instructions:**

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation bar.
2. Find the protocol in the **Approved** state that you would like to submit an amendment for.   
   * Principal Investigators (or a PI Proxy, if identified) can click on the **Active** tab to find the agreements that are in the **Approved** state and can click on the name of the agreement to begin their submission.
3. From the Agreements Workspace, select the **Create Amendment**button.
4. Enter the updated information on the SmartForm pages.   
   * *Note that an approved protocol can have only one outstanding amendment or continuing review open at a time.*
5. Prior to submission to the Agreements Manager, all required fields will need to be completed.   
   * Click the **Hide/Show****Errors**link in the navigation bar to display any unanswered questions throughout the SmartForm at the bottom of the page.  
     + Use the **Jump To:**link to navigate directly to SmartForm pages that are missing information.
   * Submissions with any incomplete information will be redirected to the study team for updates.
6. When all of the required fields have been completed, click **Exit**in the navigation bar or the **Finish** button on the last SmartForm page to be redirected to the Agreements Workspace.
7. The agreement will transition from the **Active** state to an amendment in the **Pre-Submission** state.



1. Click the **Submit** activity. This activity will remind the PI of their responsibilities and the system will check the submission for any missing fields. Click the **OK** button to submit the amendment.
2. If the submission is successful, the page will refresh and the agreement will transition from the **Pre-Submission**state, and then to the **In Review** state.

