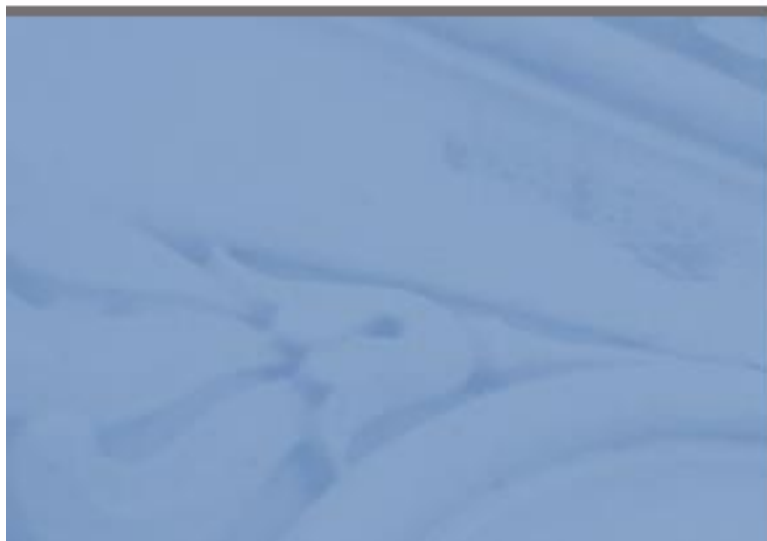


Click Portal

IACUC Module Reviewer's Guide

February 2018



University at Buffalo
The State University of New York

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IACUC Module - Reviewer’s Guide

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What is the Click Portal?

The SUNY Pre-Award and Compliance System (PACS) is a multi-year SUNY collaboration created to support investigators and students along with compliance and research administrative staff by giving them a new administrative tool - the Click Portal.

Click will automate the submission, review, and approval processes while managing all major administrative aspects of the research and compliance lifecycle - from proposal development and submission through compliance checks, negotiations, award setup and award management, to eventual project closeout.

The Click Portal integrates the following aspects of research administration into a single system:

- IRB
- IACUC
- Grants Management
- Conflicts of Interest (COI)
- Research Agreements
- Safety

Under the stewardship of UB's Office of the Vice President for Research and Economic Development, this platform will allow the University at Buffalo to achieve a new level of uniformity and efficiency, while also producing valuable data analytics that can guide future decisions.

UB is helping lead this SUNY-wide effort and was the first campus to implement the Click Portal, beginning with the IRB module in Fall 2015.

Getting a Click Account

Accounts have been created for faculty and staff at the University at Buffalo in preparation for campus-wide implementation of the Click Portal. Faculty and staff users will log into the system using their **UBIT Name** and **Password**.

If your login attempt is unsuccessful, please follow the instructions below to request an account:

1. Navigate to the [UB Research Services: Training and Development webpage](https://www.buffalo.edu/research/research-services/training.html) at <https://www.buffalo.edu/research/research-services/training.html>
2. Locate the **Click Portal Login** area on the right of the page, and click on the registration link.
3. Complete the **Request Account** form at the bottom of the page, and then click the **Register** button. Be sure to select the *University at Buffalo* as your **Campus Affiliation**.

Request Account

If you need an account in this system, please apply by submitting your details using the following form. You will be contacted once your setup is complete.

Please complete the following details

* **First Name:**

* **Last Name:**

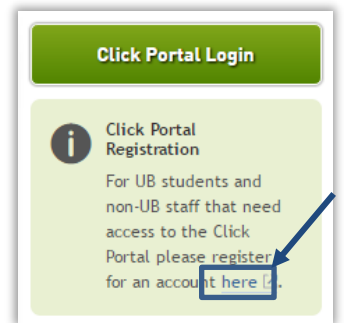
* **Campus Email Address:**

Phone Number:

Campus Login ID:

* **Campus Affiliation:**

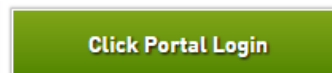
* Required



You will receive an email notification when your account has been activated.

Logging into the Click Portal

1. Navigate to the [UB IACUC webpage](https://www.buffalo.edu/research/research-services/compliance/iacuc.html) at <https://www.buffalo.edu/research/research-services/compliance/iacuc.html>
2. Locate the **Click Portal Login** area on the right of the page.
3. Click on the **Click Portal Login** link.



4. Enter your **UBIT Name** and **Password** in the fields, and then click the **Log In** button.

Login Required

Log In

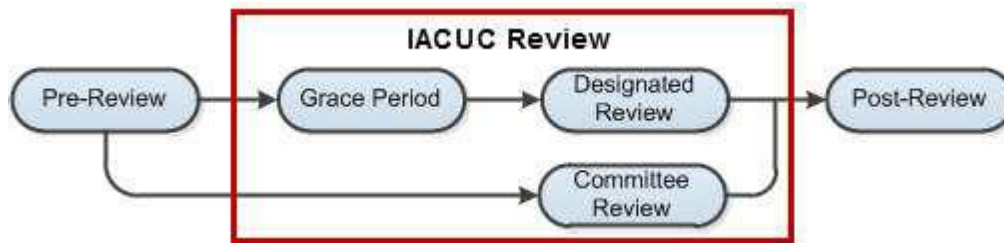
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Basic Navigation

My Inbox

Each time you log into the **Click Portal**, you will be taken to your **Inbox**. This area of the Portal contains submissions that require you to take action. You may also receive an email with a link to the submission. The email notification indicates that you must take action or informs you of important information.

There are some cases, outlined below, where a submission may not appear in **My Inbox**:



- **Grace Period** - The **Grace Period** is the timeframe in which a submission that has been sent to the committee for Designated Member Review may be called for **Full Committee Review**. If the submission is not called for **Full Committee Review**, it will undergo **Designated Member Review** by individual **IACUC Committee Members**.

Protocols in the **Grace Period** state do not appear in any **IACUC Committee Member's** inbox. See [Accessing a Protocol](#) to find protocols in the **Grace Period**.

- **Committee Review** - Submissions scheduled to undergo **Full Committee Review** at an upcoming meeting will not appear in **My Inbox**. When the submission is ready for review, you will receive an email notification with the meeting agenda. Refer to the links in the email to access the submissions you need to review before the meeting.

My Inbox is divided into two tabbed pages:

- **Compliance Tasks** - At present, this tab contains a list of the IRB, IACUC, and Safety protocols that require action.
- **SPO Tasks** - At present, this tab contains a list of the Agreements and COI Disclosures that require action.

The screenshot shows the 'My Inbox' interface with the 'Compliance Tasks' tab selected. It features a search filter and a table of items. The table has columns for ID, Name, Date Created, Date Modified, and State. There are 6 items listed.

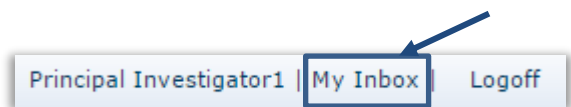
ID	Name	Date Created	Date Modified	State
STUDY00000083	Test Email	2/2/2016 11:02 AM	3/28/2016 3:02 AM	Pre-Review
STUDY00000084	Test of email to Tom	2/2/2016 11:11 AM	3/28/2016 3:01 AM	Pre-Review
STUDY00000112	MLW Test Study 3.25.2016	3/25/2016 3:01 PM	3/25/2016 3:01 PM	Pre-Submission
030RAD00000023	DRP test	2/26/2016 9:21 AM	2/26/2016 9:21 AM	Pre-Submission
030BIO00000060	Joann Crocco2	2/5/2016 1:45 PM	2/5/2016 1:45 PM	Pre-Submission
030RAD00000004	JC TEST	2/2/2016 2:30 PM	2/2/2016 2:44 PM	Pre-Submission

The listings within **My Inbox** can be sorted by using the **Filter by** option. This option will allow you to search by **ID number, Name, Date Created, Date Modified, or State**.

To determine what type of action you need to take on a submission, look at the **State** column; see the chart below for an explanation of the action required for each **State**.

Your Role	Submissions in My Inbox	
	State	Action Required
Veterinarian	Vet Consult	The IACUC staff has requested a veterinarian consultation/veterinary pre-review of this submission. Review the submission and submit your response back to the IACUC. If you have veterinary comments the protocol team must address prior to the submission advancing to IACUC review, enter them as Reviewer Notes within the appropriate page(s) of the protocol form. Submit your review decision to the IACUC.
Ancillary Reviewer	From Pre-Review through Post-Review	<p>You have been selected as an Ancillary Reviewer (either by name, or by representing a specific organization) by the protocol team or IACUC staff. Review the submission and submit your decision.</p> <p>The IACUC will not wait for Environmental Health & Safety (EH&S) input before completing its own review of the submission, however EH&S approval must be assured before IACUC approval can be granted.</p>
IACUC Committee Member	Designated Review	<p>The IACUC Chair has assigned you as a Designated Reviewer of this submission. Review the submission.</p> <p>If you have comments on the submission for the protocol team to address, enter them as Reviewer Notes within the appropriate page(s) of the protocol form. Submit your review decision to the IACUC.</p>

- To open a submission, click on its **Name**.
- You can return to **My Inbox** at any time by clicking the **My Inbox** link in the **Header** at the top right corner of the screen.



The Workspace

Once you open a protocol, you will be taken to the **Protocol Workspace**.

The **Protocol Workspace** allows you to:

- View the protocol's contents and details, including all actions performed on it
- Perform actions on the study

The screenshot shows the Protocol Workspace for protocol **PROTO201700423: Animal Calculator**. The interface is annotated with labels:

- Top Navigation:** Home, Courses, Agreements, COI, Facilities, Grants, IACUC, IRB, Safety. User: Rebecca Simms (pi)(030) | My Inbox | Logoff.
- Breadcrumb Navigation:** IACUC > Respiratory Infections Research - Rebecca Simms > Animal Calculator
- My Current Actions:** View Protocol, Printer Version, View Differences.
- Activities:** Assign Primary Contact, Assign PI Proxy, Manage Guest List, Add Comment, Withdraw, Discard, Copy Submission, Relate Associated Projects.
- Shortcuts Area:** My Inbox, Help Center, Submissions, Concerns, Reports, Library.
- Main Content:**
 - Metadata:** Principal Investigator: RebeccaSimms (pi)(030), Submission type: New Protocol Application, Letter: None, Protocol type: Experimental Research, Admin office: IACUC University at Buff.
 - Workflow Diagram:** Pre-Submission → Pre-Review → IACUC Review (highlighted) → Clarification Requested (looping back to Pre-Review and IACUC Review).
 - History Table:**

Activity	Author
Ancillary Reviews Managed	Markosi (iacucc)(030), Jim
Submitted	Simms (pi)(030), Rebecca
Protocol Created	Simms (pi)(030), Rebecca
- Resource Tabs:** History, Experiments, Documents, Reviews, Reviewer Notes, Contacts, Snapshots.

The key elements in the **Workspace** are:

- **Header** - Links to your profile and **My Inbox**, and lets you log off
- **Top navigation menu** - Links to the different modules within the **Click Portal**
- **Breadcrumb navigation menu** - Lists the hierarchy of pages and enables you to move quickly to a previous location

- **Activities** - Actions that can be taken based on a submission's current **State**
- **Resource tabs** - Collected information regarding the submission
- **History** - Actions taken previously on this submission
- **Shortcuts** - Quick links to other frequently used areas of the portal, and to documentation

SmartForms

To open a study from the **Workspace**, click on the **Edit Protocol** button.

NOTE: This button may also be labeled **View Protocol**, dependent upon the **State** of the submission you are opening.


The screenshot shows a web form titled "Basic Information" for editing a submission (PROTO20170027). The form contains the following sections:

- Select research team:** Respiratory Infections research SWH
- Title of protocol:** Evaluation of the Efficacy of a Killed Vaccine in the Prevention of Respiratory Mycoplasmosis
- Short title:** SWH prevention of rm
- Non Scientific Summary of Research:** In domestic poultry, captive raised upland game birds, and waterfowl, Respiratory Mycoplasmosis (RM) is a chronic respiratory disease affecting the lungs, air sacs and sinuses. Losses in the poultry industries are the result of condemned and downgraded carcasses at slaughter, reduced egg production, poor feed conversion and medication costs. RM is the most costly disease of domestic birds worldwide. A vaccine exists, but it has harmful side effects. This research will examine the efficacy of the killed RM vaccine in the prevention of RM infection.
- Principal Investigator:** Rebecca Simms (p1630) [Select] [Clear]
- What is the Intention of the animal protocol?**
 - Breeding Only
 - Experimental Research
 - Field Research
 - Holding Protocol
 - Teaching/Training

Submissions are comprised of several pages known as **SmartForms**. They are referred to as 'smart' because the portal will branch to add additional forms to the study based on the **Principal Investigator's (PI's) responses** to questions on the pages.

The key elements in the **SmartForms** are:

- The **Continue** and **Back** buttons will move you forward or back one page in the study.
- The navigation bar at the top and bottom of each page will allow users to perform the following actions:

- **Save** - Saves any changes made to the current page. Do not make any edits directly to the investigator's protocol.
 - **Exit** - Exits the submission and returns you to the **Protocol Workspace**.
 - **Hide/Show Errors** - Performs a check on every page within the submission to ensure that all required fields have been completed. This is used by the PI prior to submitting the protocol for IACUC review.
 - **Jump to:** - Allows you to see and navigate to all pages within the submission.
- Any item on a **SmartForm** that has a red asterisk (*) next to it is a required field for the **PI** to complete.
 - Clicking on the blue **Help** icons () next to items will open a window that will offer assistance with completing the field.

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Locating Meeting Agenda Items

As an *IACUC Committee Member*, you can access a meeting agenda listing the submissions to be reviewed in an upcoming meeting. You can get the agenda in two forms:

- As a web page with links to the submissions for review
- As a printable document

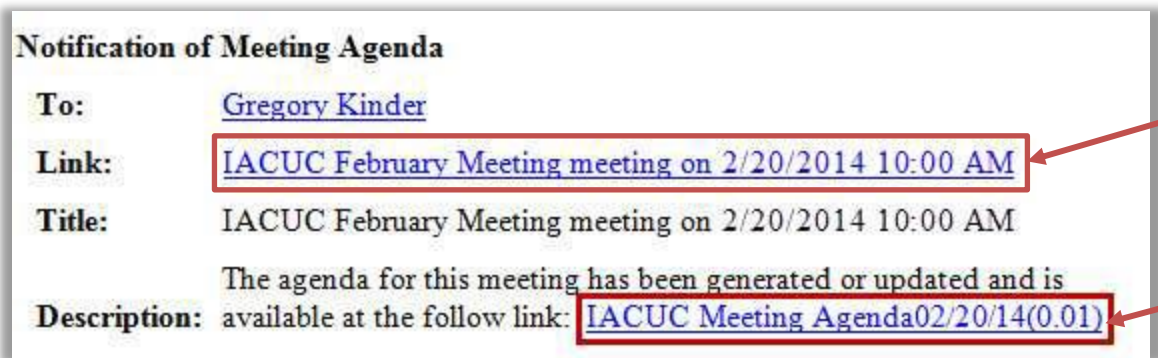
The procedures below describe how to access both forms of the agenda in two alternative ways:

- From an agenda notification email you receive
- By navigating to the agenda within the Click IACUC module

Accessing the Agenda from an Email Notification

1. Open the email notification informing you about an **IACUC** meeting agenda.

The **Notification** content should resemble this:



2. Click the appropriate link:

- To access the Meeting Workspace web page containing links to the submissions for review, click the link next to the **Link:** field. A description of the Meeting Workspace is provided in the next section of this guide.
- To open or save the printable document, click the link next to the **Description:** field.

NOTE: The IACUC meeting Workspace will have the most up-to-date agenda. If the IACUC Office updates the agenda, you will receive another notification email.

3. If prompted, log in to the Click Portal.

Accessing the Agenda from Within the IACUC Module

1. Log in to the Click Portal.
2. In the navigation menu, click the **IACUC** tab and then click **Meetings** on the left. Click on the date of the meeting for which you wish to view the agenda. You will then be taken to that meeting's Meeting Workspace.
3. The Meeting Workspace displays the list of **Agenda Items** in the center of the page, resembling this:

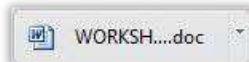
IACUC March Committee
Meeting Date & Time: 3/24/2014 7:30 AM
Agenda: Agenda for IACUC March Committee meeting on 3/24/2014 7:30 AM(0.01)
Minutes: Not yet created.

Agenda Items	
ID	Name
PROTO201400033	01222014 LSH Protocol B
AMEND201400001	Amendment for Protocol 01222014 LSH

4. Click the appropriate link:
 - To access a submission directly from the **Agenda Items** list, click the **Name** of the submission.
 - To open or save the printable agenda document, click the link in the page header in the **Agenda:** field. The agenda is in Microsoft Word format.

NOTE: Microsoft Word documents open differently in different web browsers. If the document does not open promptly:

- Click the Word icon if it is flashing at the bottom of your screen, and then click one of your open Word documents.
- Check the bottom of the browser window to see if the document icon and name is shown there. If so, click the name to open it.

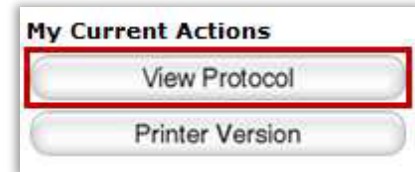


Viewing the Submission Details

As a reviewer, you need to view all the information submitted as part of the protocol.

1. To open a protocol, click its **Name** when you find it in a list of submissions (See [Accessing a Protocol](#)).

2. From the Protocol Workspace, click **View... (Protocol, Amendment)** on the left.
- a. Note that this button may read **Edit... (Protocol, Amendment)**, based on the **State** the submission is in.

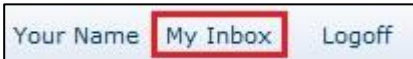



3. Use the **Continue** and **Back** buttons to view all of the **SmartForm** pages.

Accessing a Protocol

NOTE: Your access to a submission is personalized based on your role in the system and the role you play in relation to the particular protocol.

To find a list that includes the submission, try these suggestions:

Check this list...	For...	How to find this list
My Inbox	Submissions assigned to you to review via: <ul style="list-style-type: none"> • Designated Review • Vet Consult • Ancillary Review (EH&S) 	When you log into the IACUC system you will be on the My Inbox page. If not, click the My Inbox link in the top right navigation header. 
IACUC In-Review tab	Submissions that are: <ul style="list-style-type: none"> • In a Grace Period state • Awaiting meeting or reviewer assignments 	Click IACUC in the top left navigation area and select the In-Review tab. 

Check this list...	For...	How to find this list
	<ul style="list-style-type: none"> Undergoing review and clarification (Pre-Review by <i>IACUC Coordinators</i>, a <i>Veterinarian</i> consult, a full Committee or Designated Review, etc.) <p>Submissions for which an IACUC decision has been made but not yet communicated to the protocol team.</p>	
IACUC Active tab	Approved submissions	Click IACUC in the top left navigation area and select the Active tab.
IACUC Archived tab	Discarded or closed submissions	Click IACUC in the top left navigation area and select the Archived tab.
IACUC All Submissions tab	All submissions entered into the system that you have permission to view	Click IACUC in the top left navigation area and select the All Submissions tab. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>TIP: Try filtering this list by the protocol Name. Next to Filter by, select Name. Then type the beginning of the name and click Go.</p> </div>

Accessing Experiment Details

There are several ways to view a protocol's experiments:

- On the **Experiments** page of the protocol, click the experiment name to drill down to the details. You can also click any procedure **Name** to see its details.

NOTE: The procedure name indicates if it is a **Standard** or **Team** procedure so you can easily identify the institution's pre-approved procedures (**Standard**) from those created by the protocol team (**Team**).

Experiments

1. * Define the experiments to be used in this protocol:

Name	Species	USDA	Count	Count by Pain Category	Common Procedures
Experiment One	Rat	no	20	B: 20 C: D: E:	Physical Restraint: Physical Restraint (Standard)

- On the Protocol Workspace, click the **Experiments** tab to see a list of experiments along with the **Procedures** and **Substances** included in the protocol. Click a **Procedure** or **Substance** to open it.



Accessing Protocol Documents

There are two options for accessing the various documents attached to an IACUC protocol:

- While viewing the details of the submission, click the name of each document when you encounter it on the various **SmartForms**. Documents are listed in tables throughout the forms.
- When you have opened the Protocol Workspace you can view a list of all the attached documents in one place by clicking the **Documents** tab.

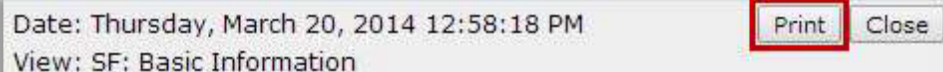


Printing Submission Pages

- From the Protocol Workspace, click **Printer Version** on the left.

NOTE: With the **Printer Version** displayed, you can search it by pressing **CTRL+F** or **Command+F** and typing your search term. You can also view a particular section by clicking a link in the **Table of Contents** (top right) to jump to that section.

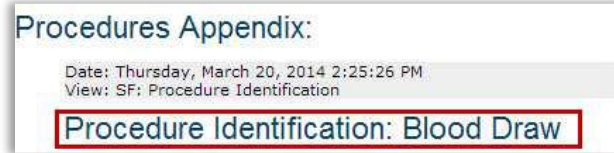
- Click **Print** at the top.



- An abbreviated version of the protocol prints to your default printer. The printer Version shows each page in the submission followed by appendices that list the **Procedures**, **Substances**, and **Experiments**.

In the appendix, you can identify each new **Procedure**, **Substance**, and **Experiment** as follows:

- **Procedures** - The prefix ***Procedure Identification***. For example, Procedure Identification: Blood Draw.



- **Substances** - The prefix ***Substance Information***. For example, Substance Information: Acetone.
- **Experiments** - The experiment name. For example, Control.

Requesting Clarifications to a Submission

As an *IACUC Committee Member*, you can ask the protocol team to clarify or change information in the submission by adding **Reviewer Notes** on individual pages in the SmartForms after reviewing the submission. Once you have submitted your comments, they can be sent to the protocol team by the IACUC Office.

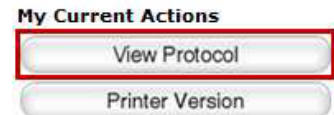
NOTE: *Ancillary Reviewers* cannot add **Reviewer Notes**; instead, they can add **Comments** about the submission when they submit their review. See [Submitting a Review Decision](#).

Reviewer Notes are placed on each page of the protocol needing revision and enable the protocol team to address issues with the submission quickly and appropriately. There are two types of **Reviewer Notes**—one that requires a response from the *Principal Investigator (PI)* and one that doesn't. The *PI* must respond to all notes requiring a response to move the submission forward in the workflow.

Adding Reviewer Notes

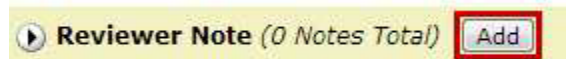
This section reviews adding Reviewer Notes to a protocol. If an *IACUC Committee Member* has general comments about the protocol, rather than a comment or question about a particular protocol page, the *IACUC Committee Member* would use the instructions for [Adding Private Comments](#).

1. From the **Meeting Agenda** email notification, or **My Inbox**, click the **Name** of the submission to open it.
2. Click **View...** (View Protocol, View Amendment, etc.) on the left.
3. Navigate to the page where you wish to add a **Reviewer Note**.



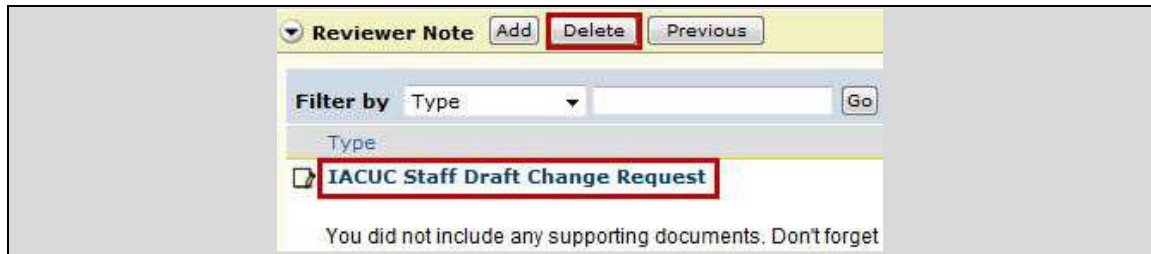
NOTE: You cannot add **Reviewer Notes** to a specific **Procedure** or **Substance** in a submission. Instead, add a **Reviewer Note** on the **Experiments** page with your comments regarding the **Procedures** or **Substances** used.

4. Click **Add** in the **Reviewer Note** bar at the top of the page



5. Choose a **Type** from the drop-down menu. You can choose a **Note** that requires a response from the *PI*, or one that does not. If the **Note** requires a response from the *PI*, the *PI* must respond to the **Note** before the submission can move forward in the workflow.
6. Type your comments into the **Note** box, and then click **OK**.

NOTE: If you need to modify your **Reviewer Notes**, use the options in the **Reviewer Note** bar at the top of the page.



- To delete the **Note**, click the **Delete** button.
- To edit the **Note**, click the link under the **Type** column.

7. When done adding **Notes** on specific pages, click **Exit** in the navigation bar at the top or bottom of the page.

If the submission is scheduled to be reviewed via Full Committee Review, the **Reviewer Notes** that have been added to the submission will be reviewed and discussed at the *IACUC Committee Meeting* prior to being sent to the protocol team by the IACUC Office.

If the submission is being reviewed via Designated Member Review, the **Reviewer Notes** will be sent directly to the protocol team by the IACUC Office upon completion of the review.

Adding Private Comments

You will add your revision requests as **Private Comments** for other reviewers and the IACUC Office to see when they review the submission. When you add a private comment, it will appear in the submission's **History**.

NOTE: You can add regular or **Private Comments** to a submission.

- **Regular Comments** are viewable by any IACUC module user that can view the submission, including the protocol team and the *Principal Investigator*. These comments can be added by using the **Add Comment** link. It is advised that *Committee Members* do not use this function.
- **Private Comments** are only viewable by other reviewers (*Veterinarian, IACUC Coordinator* and *Director, IACUC Committee Members*). **Private Comments** do not display on the **History** tab for protocol team members.

1. From the **Meeting Agenda** email notification, or the Meeting Workspace, click the **Name** of the submission to open it.
2. Click **Add Private Comment** to add a comment that only other reviewers and the IACUC Office can see.



3. Type your comment into the **Add Private Comment** window.
4. If desired, select an individual to receive an email notification of your comment.
5. Click **OK**.

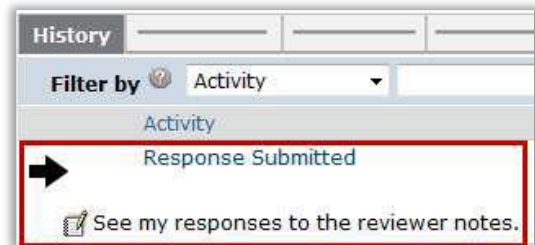
Page left intentionally blank

Viewing Changes to a Submission

If the protocol team made changes to their submission in response to your clarification request, you will want to determine what changed since you last reviewed it. To figure out what changed, review the responses to the **Reviewer Notes** (and any clarification request **Comments**) from the **PI**. You can also view the **Change Log** to see all changes made to the submission by person and date or compare two versions of the submission to see what changed on specific pages.

Viewing Responses to a Clarification Request

1. From **My Inbox**, click the **Name** of the submission to open it.
2. Click the **History** tab.
3. In the **Activity** column, look for **Response Submitted** and any comments the **PI** may have added.



4. If **Reviewer Notes** were added to the submission, click the **Reviewer Notes** tab on the submission workspace and review the **PI's** responses to the notes.



5. To view the submission page related to the reviewer note, click the **Jump To** link. **Exit** the submission when done.

From within the submission, you can click **Previous** and **Next** on the **Reviewer Note** bar to move through multiple **Reviewer Notes**. You can also hide the **Reviewer Notes** to make it easier to view the protocol by clicking the arrow on the left of the **Reviewer Note** bar.



NOTE: You have not submitted your review yet. When you are ready to submit it, see [Submitting a Review Decision](#).

Viewing the Change Log

The **Change Log** only shows changes made to the submission after it has entered the **Pre-Review** state. For approved protocols, the **Change Log** shows only the changes made on the initial submission; changes from amendments show on the **Change Log** for the amendment.

1. From **My Inbox**, click the **Name** of the submission to open it.
2. In the Protocol Workspace, click the **Change Log** tab. The tab lists the protocol page, the item on the page that changed, the original and new values, who made the change, and when.

Page	Location of Change	Original Value	New Value	User	Date of Change
Holding Details	Holding Description	6 monhs to allow them to mature	6 months to allow them to mature		
Funding Sources	Funding Sources		Added: BioFactura Research Institute		

NOTE: Use the **Filter by** feature to find specific data. See [Filtering and Sorting Data](#).

Viewing Changes between Two Versions of a Submission

1. From **My Inbox**, click the **Name** of the submission to open it.
2. Click **View Differences** on the left.
3. Next to "Show Changes made...", select the version to compare to the current version.

Show Changes made between Current Version (0.3) and 0.2 1/20/2014 1:47 PM

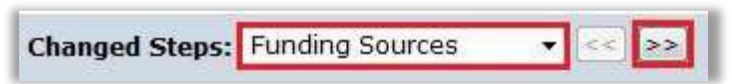
4. Look for **red** and **green** changes in the current form.

Click the arrow to show the details and new and old values. The changes since the previous version appear as follows:

- Added text is highlighted in **green**.

Differences	
▶	Added: Mayo Clinic
▶	Changed: National Institute of Health
	Location: Funding Source ID
	New Value: 38978
	Old Value: 38974

- Deleted text is highlighted in **red** with a line through it.
5. Next to **Changed Steps**, click the arrow (or use the drop-down list) to view each of the other forms that have changed.
 6. Exit the **View Differences** screen by clicking **Close** on the right.



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Submitting a Review Decision

After reviewing a submission, you must record your decision in the system. Recording the decision completes the review and moves the submission forward in the IACUC process.

For protocols undergoing **Full Committee Review**, an IACUC staff member must submit the decision on behalf of the committee.

There are several types of review, with procedures for each identified below:

- [Vet Consult](#)
- [Ancillary Review \(EH&S\)](#)
- [Designated Review](#)

Submitting a Veterinarian Consultation

1. Click **Submit Vet Consult** on the left.



2. Add comments and attach documents related to the review as needed.
3. Indicate whether you think the submission is acceptable as it is currently written.
4. Click **OK**.

The submission will move back to the *IACUC Coordinator*.

Submitting an Ancillary Review

1. Click **Submit Ancillary Review** on the left.



2. Select the review you are completing from the list.
3. Indicate whether you think the submission is acceptable as it is currently written.
4. Add comments and attach documents related to the review as needed.
5. Click **OK**.

The review comments are shown in the protocol's **History**.

Submitting a Designated Review

If you feel the full committee should review the submission, do not submit your **Designated Review**. Instead, assign the submission to **Full Committee Review** using the **Assign to Committee Review** activity.

1. Click **Submit Designated Review** on the left.



2. Select your determination.
3. If you are approving the submission, select the **Approval Date**. Otherwise, leave the field blank. The **Approval Date** should be the date you complete your review.
4. If you are ready to submit your decision, select **Yes**. Otherwise, answer **No**, which enables you to return and perform **Submit Designated Review** again to update the information.
5. Click **OK**.

Submitting a Concern

Any Click IACUC user role (Study staff, *IACUC Coordinators, Directors, Committee Members*, etc.) can enter a concern or report of non-compliance about the research facilities or personnel involved in the care and use of animals.

1. From the IACUC Submissions page, click **Create Concern** on the left.
2. Complete the required questions marked with a red asterisk (*). Click **Continue** to move to the next page.
3. When done, click **Finish**.

The concern has not yet been submitted for IACUC review, but it will now appear in IACUC Office staff member's **Inboxes**. IACUC staff must submit the concern to move it from **Pre-Submission** to **Pre-Review**.

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Filtering and Sorting Data

Many pages contain tables you can filter and sort to help you find the data you want.

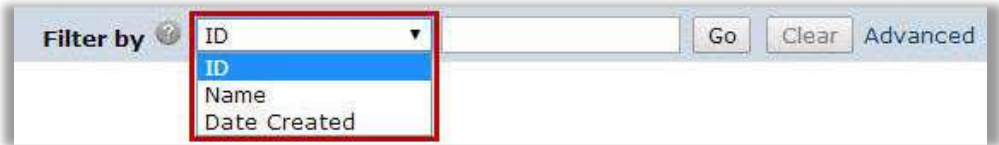
- Filtering reduces the list to only the data that meets the criteria. The advanced filter lets you combine multiple filter criteria together.
- Sorting displays the data in ascending or descending order by a particular column.

For some reports, you can change the criteria used to create the report before you apply additional filters or change the sort order.

NOTE: For details on using **Advanced Reports**, see the *Advanced Reports Quick Reference* guide.

Filtering Data

1. Select the column to **Filter by** from the drop-down menu. The menu lists only the columns you can **Filter by**.

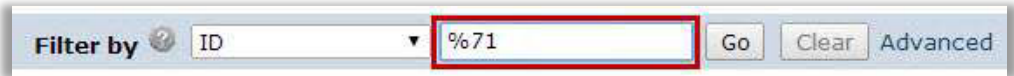


NOTE: To combine multiple filter criteria, such as *ID number*, *Name*, and *Date Created*, use the [Advanced Filters](#).

2. In the next box, type the beginning characters for the items you want to find. If you do not know the beginning characters, type a % symbol as a wildcard before the characters.

Examples:

- 71 shows all items beginning with 71
- %71 shows all items containing 71 in any position



NOTE: For examples and a list of operators you can use, click the **Help** icon.



3. Click **Go** to apply the filter. The table shows only those rows that are an exact match. If you do not see the expected items in the list, click **Clear** in the **Filter by** area to remove the filter.

Using Advanced Filters

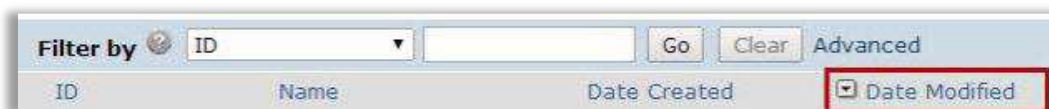
1. In the **Filter by** area, click **Advanced**.



2. Enter filter criteria as explained in the previous section. To add criteria, click **Add Another Row**.
3. Click **Go** to apply the filter. The table shows only those rows that match all the filter criteria.

Sorting Data

Click the column header you want to sort by. Click it a second time to reverse the sort order. The arrow indicates the column by which the data is sorted and the sort order, either ascending (up arrow) or descending (down arrow).



NOTE: If the column header is not a link, you cannot sort by that column.

Changing the Criteria of the Report

1. On the right of the **Filter by** area, click **Change Parameters**.



2. Change the report criteria field values as needed. Typically, multiple criteria rows (see example 2) are treated with an "and" between them. That is, the report will show items that meet criteria 1 and criteria 2.


- **Example 1:** Shows all projects that are not archived (!= means the field is not the specified value).

Field	Comparator	Value
Project State	!=	Archived ▼

- **Example 2:** Shows projects that will expire in the next 90 days, that is, the expiry date must be before or on "today plus 90 days" **and** the expiry date must be today or later. For these fields, you can select different dates using the calendar.

Field	Comparator	Value
Date Expired	<=	Today plus 90 day(s) 📅
Date Expired	>=	Today 📅

NOTE: For a list of the operators you can use in the parameter criteria, click the **Help** icon.

Filter by  Protocol ID ▼

3. Click **OK**.



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