ZOT hSCRO

# Reviewer’s Guide

March 2021

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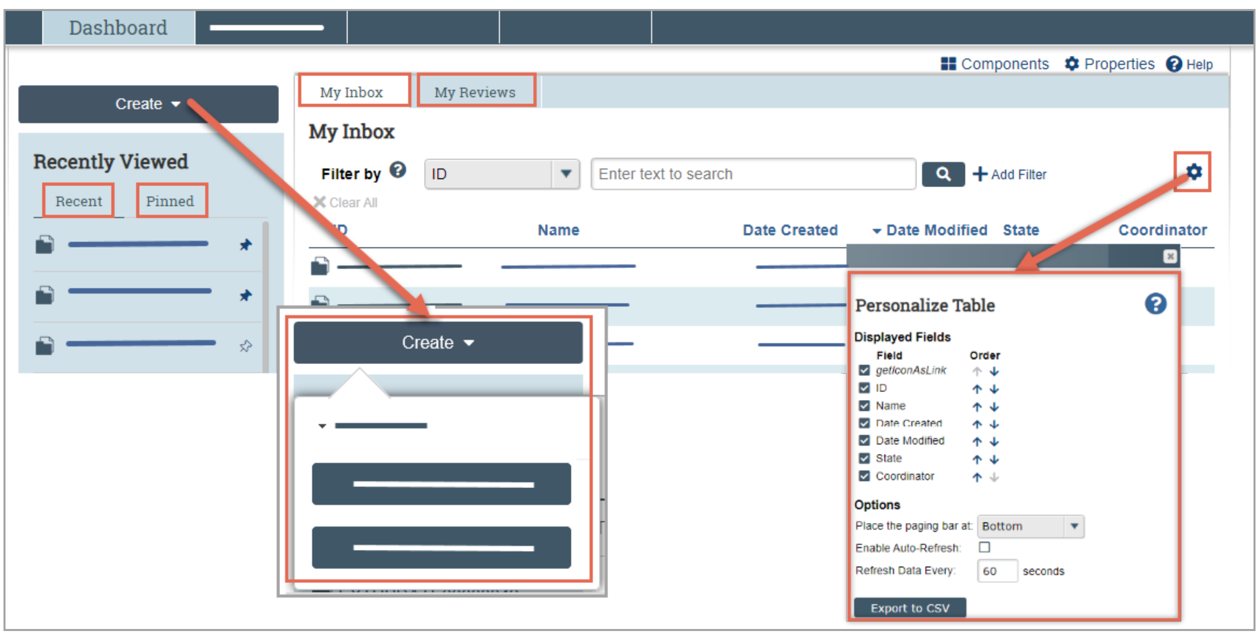
## Navigation and Basic Tasks

When you first log in, you will be on the Dashboard. This topic lists where to find Safety protocols and the basic tasks you will perform.

### To find key items

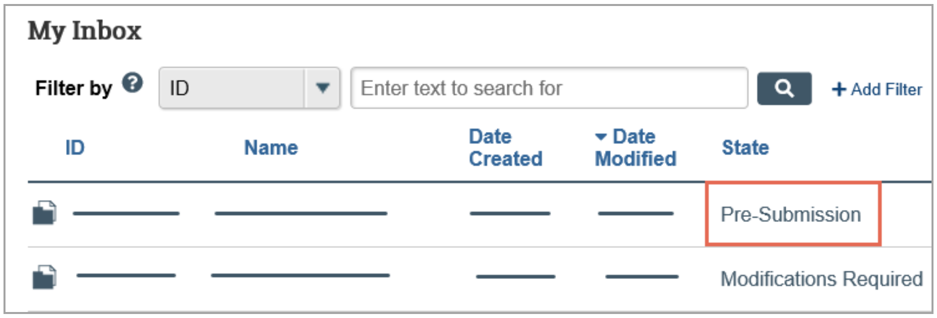
From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox.
- **Create menu and buttons:** Actions you can perform. The menu will not show if you do not have access to any buttons.
- **Recently Viewed:**
  - **Recent**: The last several items you viewed. Scroll through this list to find an item you worked on recently.
  - **Pinned:** You can pin the items in Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.




### To identify what action is needed

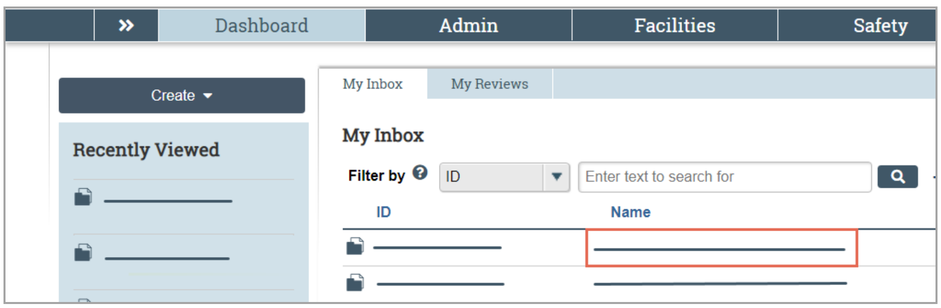
1. Review the state of submissions in My Inbox.
   The state gives a clue as to what to do next. For example, "Pre-Submission" means you haven't submitted the Safety protocol.




2. You can finish and submit the Safety protocol for review.

### To open a submission

1. From My Inbox, click the submission name.
   The submission workspace opens.

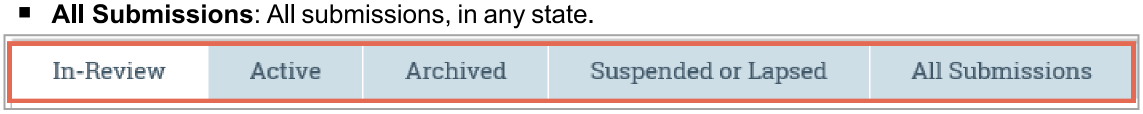



### To view submission history

1. From the submission workspace, click the **History** tab.
   The history lists the activity taken on a submission, including any comments, attachments, or correspondence added.

### To find previous submissions

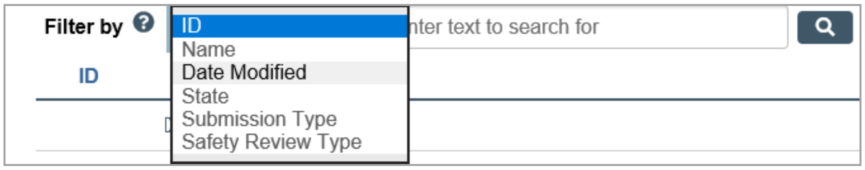
1. From the Top Navigator, click **Safety**.
2. Click the appropriate tab to see all of your submissions:
   - **In-Review**: All submissions undergoing Safety committee review.
   - **Active**: All approved submissions.
   - **Archived**: All discarded and closed submissions.
   - **Suspended or Lapsed**: All submissions that have been suspended or have passed the continuing review due date.
   - **All Submissions**: All submissions, in any state.




### To filter data in a table

Many pages contain tables that you can filter to show only specific records. You may also need to filter a list of selection options, so you can find the correct ones to select.

1. Select the column to filter by.



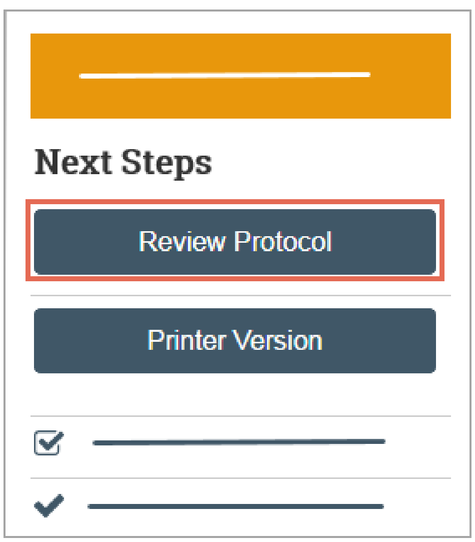

2. For a list of operators you can type in the search box and press Enter or, click the Search icon.
3. Type the beginning characters for the items you want to find. You can also type a % symbol as a wildcard before the characters. For example:
   - 71 shows all items beginning with 71
   - %71 shows all items containing 71
4. Click **Go** to apply the filter.
5. To combine multiple filter criteria, click **Add Filter**.

## Review a Safety Submission

When a protocol or a follow-on submission is submitted, the submission appears in the authorized users' inbox to perform the next step in the review process.

### To review submission details

1. Click the e-mail link to open the submission workspace.
   If you no longer have the e-mail message, find the submission on the **My Inbox** tab, and click its name.
2. Click **Review Protocol** and review each section.
   You can scroll through the submission or use the Left Navigator to jump to specific sections of the form.

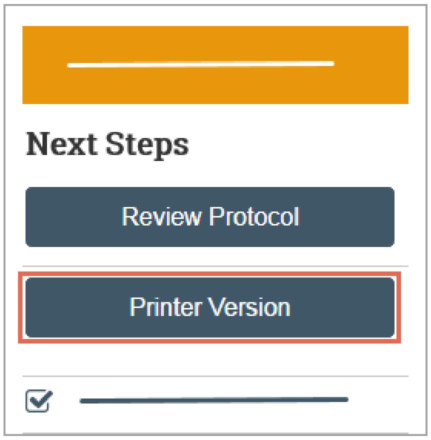



   a. To see what changed between this and a previous version, click **Compare** on the Left Navigator and select the version to compare against.
3. After reviewing each section, select the checkbox at the bottom to indicate you have reviewed it.
   a. The section turns green, and the check mark for the section also turns green.
   b. If the submission is edited later, the check mark turns gray and an Edit icon is added, indicating to review that section again.

**Note:** This review tracker feature does not stop a submission from moving forward in the review process.

### To print submission pages

1. On the submission workspace, click **Printer Version**.




2. Select one or more printer packet options and then click **Print**.
   A print packet is a pre-determined subset of the SmartForm information.This avoids printing the entire SmartForm when you only need one or two sections.

   **Note:** With the printer version displayed, you can search it by pressing CTRL+F or Command+F (Windows and Macintosh respectively) and typing your search term.
3. Click **Print** at the top of the preview to send it to your default printer.

## Request Clarification

At nearly every stage of the review process, it is possible to request clarifications or modifications on a submission. You can ask the protocol team to clarify or change information in the submission by adding reviewer notes to submission pages.

You can add reviewer notes to a page, (for example, for a general comment or question about responses on a page, or to a specific field on a page) and then submit your change request to the PI.

### Prerequisites for this task

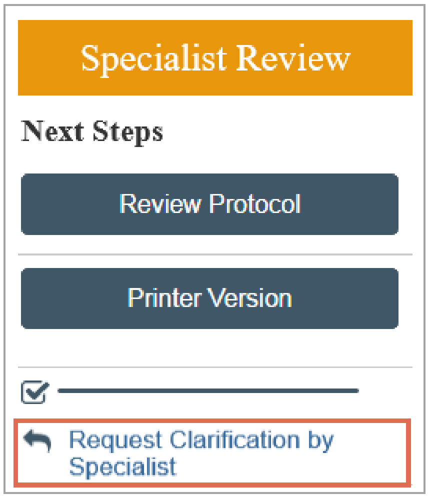
- You are assigned to review the submission in its current state. (The submission appears in your inbox.)

### To add reviewer notes to protocol

1. From the submission workspace, click **Review Protocol**. See Review a Safety Submission.
2. Navigate to a question you want to comment and click the Note icon.
3. Type your change request in the box.
4. Select whether a response is required or not and/or attach files if needed then click **OK**.
5. Repeat previous steps for all the pages you want to comment on.
6. Check the box of each section as you complete it to track your progress.
7. When done adding notes, exit the submission.

### To send change requests to the PI

1. From the submission workspace, click **Request Clarification by Specialist**.




2. If desired, assign a different user as the safety specialist for this submission.
3. To make a general request or alert the research team about reviewer notes within the submission, type a comment in the box.
4. Add any supporting documents and click **OK**.

## View the Change Log

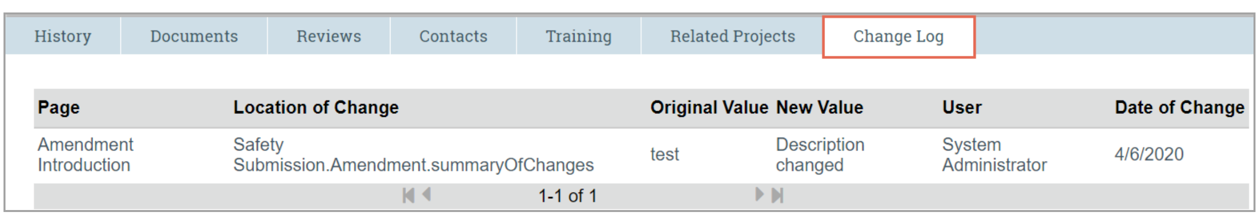
If any changes were made to submission, you can view the changes on the Change Log tab.

The Change Log shows changes only after the submission has entered the Pre-Review state. For approved protocols, the Change Log shows only the changes made on the initial submission, whereas changes from amendments are logged in Change Log for the amendment.

**Tip:** If your institution allows Safety staff *and* protocol team members to edit protocols, you may want to identify who made each change.

### To view the change log

1. From My Inbox, click the name of the submission to open it.
2. In the submission workspace, click the **Change Log** tab.
   The tab lists the submission page, items on the page that changed, original and new values, who made the change, and date of change.



## Submit a Biosafety Risk Assessment

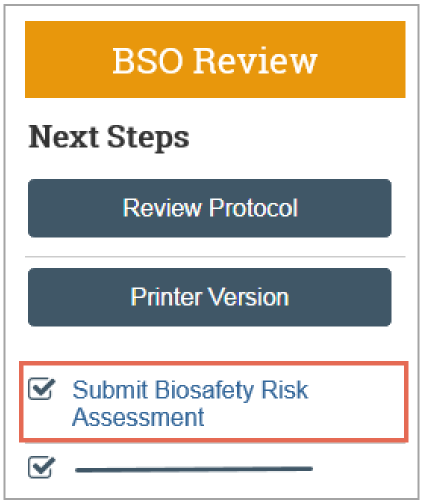
This activity is a response to a request for a risk assessment made during specialist review.

### Prerequisites for this task

- The submission is in the BSO Review state.
- You are logged in as a Biosafety Officer.

### To submit a biosafety risk assessment

1. From the submission workspace, click **Submit Biosafety Risk Assessment**.




2. Type an explanation of your risk assessment in the **Summary of risk** box.
3. Select a risk assessment, if necessary.
4. Add any supporting documents if applicable and then click **OK**.
   The protocol reverts to the **Specialist Review** state.

## Submit a Member Review

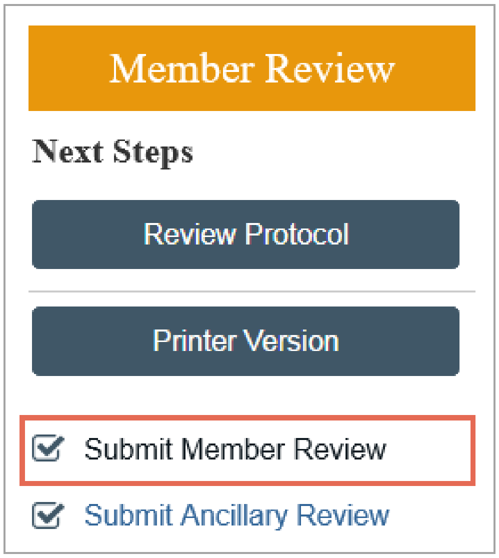
A Safety specialist can request reviews by one or more individual members of the Safety committee. This section shows committee members how to perform Member Review.

### Prerequisites for this task

- The submission is in the Member Review state.
- You are logged in as a user with the Committee Member role.

### To characterize your review and submit

1. From the submission workspace, click **SubmitMemberReview**.




2. Select **Yes** to submit the review.
3. Type any comments you have about the submission.
4. Add any supporting documents if applicable and then click **OK**.

**Note:** If multiple reviewers are assigned, then the submission does not change to the Specialist Review state until all assigned members have submitted their review.

## Submit an Ancillary Review

If you are assigned as an ancillary reviewer for a submission, you will receive an e-mail notification. If your review is required for approval, the submission appears in your inbox and remains there until you accept or reject the submission.

### To submit the review

1. From My Inbox or the In-Review submissions tab, click the submission name.
2. Click **Submit Ancillary Review**.
3. Select the review you want to submit.
4. Accept or reject the submission.
5. If required, type a comment and add supporting documents.
6. Click **OK**.

## Search Your Solution

To help you work more efficiently, you can use search to locate a wide range of information in your solution. You can search for project data, documents, or content from specific pages on your site. The search results appear in a secondary window and display only those items you have permission to view. Results are ranked to show items where the search term is most prevalent at the top.

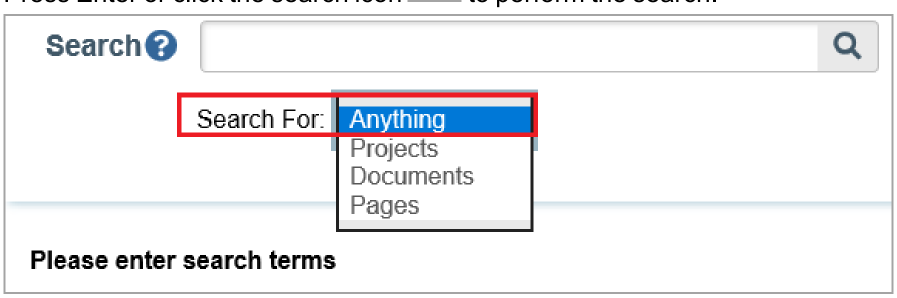
After your initial search, you can further refine results using the following filter options:

- **Projects**— Projects are the day-to-day items you use to manage your research in a Huron solution. They include items such as funding proposals, studies, protocols, agreements, and disclosures. You can search for any project in your solution using properties on the project, including its name, ID, and description. Depending on the solution, other properties are also available to search. When you select the Projects filter, the system will only display results that match search criteria in your project data.
- **Documents**— Documents are third-party files uploaded to your solution outside the context of a project. When you select the Documents filter, the system will only display results that match search criteria from documents. The search includes metadata on a document, such as its name and description. It also includes the contents of a document. From the results, you can click directly on the provided link to open a document.
- **Pages**— Pages organize information on your site into a hierarchy that you can use to view and manage your work. The Pages filter provides a way for you to search one type of page within your solution - content pages. Content pages are presented outside the context of a project. They supply supporting information for your solution, such as the Help Center, Reports, and Meetings. Dashboards and project workspaces are not included with this filter.

**Note**: Content on the site is updated periodically. If you are searching for something you just added, results might not be available immediately. Try your search again at another time.

### To search your solution

1. In the Top Navigator, click **Safety**.
2. In the **Search** box, type your search criteria. You can use the following operators:
   - **And**: Finds all the specified words.
   - **Or**: Finds at least one of the specified words.
   - **Not**: Excludes the specified word. You cannot start a search with the Not operator.
   - **Quotation marks**: Finds the exact phrase.
3. Press Enter or click the search icon  to perform the search.

   The search results appear.
4. Click the **Search For** arrow to apply filter of your choice.

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