# User Guide: *Getting Started and Navigating the Study Assistant Dashboard in PRIS$^3$M*

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| **Last Update** | **October 17, 2018** |
| **Intended Audience** | **Principal Investigator/Researcher** |
| **Purpose** | **To provide the user with an introduction to the PRIS$^3$M system and basic information necessary to best utilize the system.** |

## What is Carilion Clinic PRIS$^3$M?

Carilion Clinic PRIS$^3$M (Partnership in Research Integrity and Subject Safety Submission Module) is a paperless, electronic method for researchers to submit, track, and review the scientific, regulatory, and compliance information required for the safe conduct of human subjects research at Carilion Clinic. The system also provides a platform for the IRB to share critical information regarding the submission and review of new applications, amendments, continuing reviews, reportable events, and study closures.

## Recommended Web Browsers

For the best experience use one of the following recommended browsers:

| Platform | Browser |
|---|---|
| Microsoft Windows (in recommended order) | Internet Explorer 11+, Firefox 24+, Chrome 30+ or later |
| Apple Mac OS X 10.4x or later | Safari 6+, Firefox 24+ |

**IMPORTANT:** You must allow pop-ups for this site when logging in. Certain actions within the application will not function if the pop-up blocker is turned off for this site. Changing this setting will depend on the browser and version that you are using.

## System Login

**STEP 1.** **Close** all open web browsers.

**STEP 2.** **Open** a new browser and go to: https://carilionclinic.imedris.net/

**STEP 3.** **Login** using your Carilion Clinic ID and password.

**If you are unable to access the PRIS$^3$M system, either due to your log in not working or not having a Carilion user ID and password, please review the USER GUIDE – Getting Access to the PRIS$^3$M.**

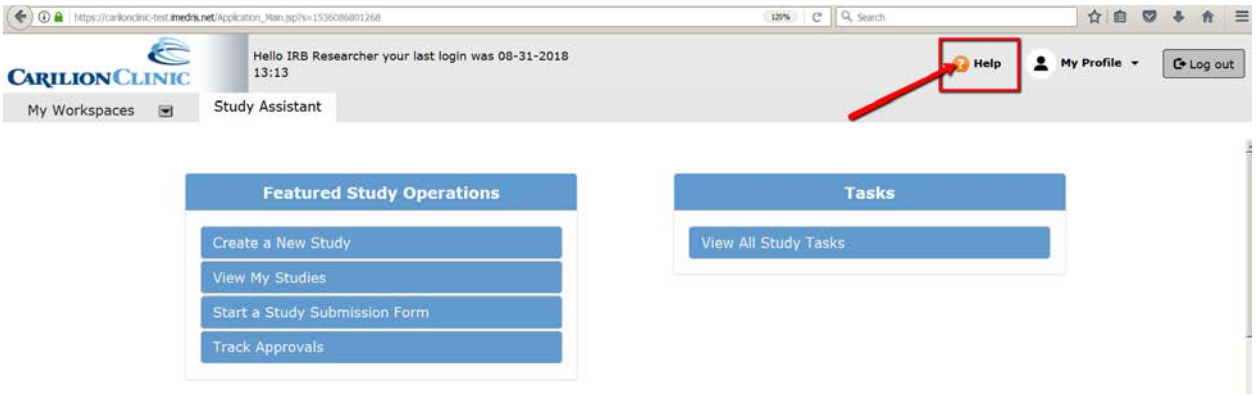
**STEP 4.** If you have the appropriate permissions but experience issues with logging in (for example, if it says you are being redirected but it doesn't complete), please clear all your cookies for that browser and try again). If you are still unable to log in, please complete a Help Ticket at https://is.gd/PRIS3M_IRB_Help_Form or if urgent, you may contact the **IRB Office** at **irb@carilionclinic.org**

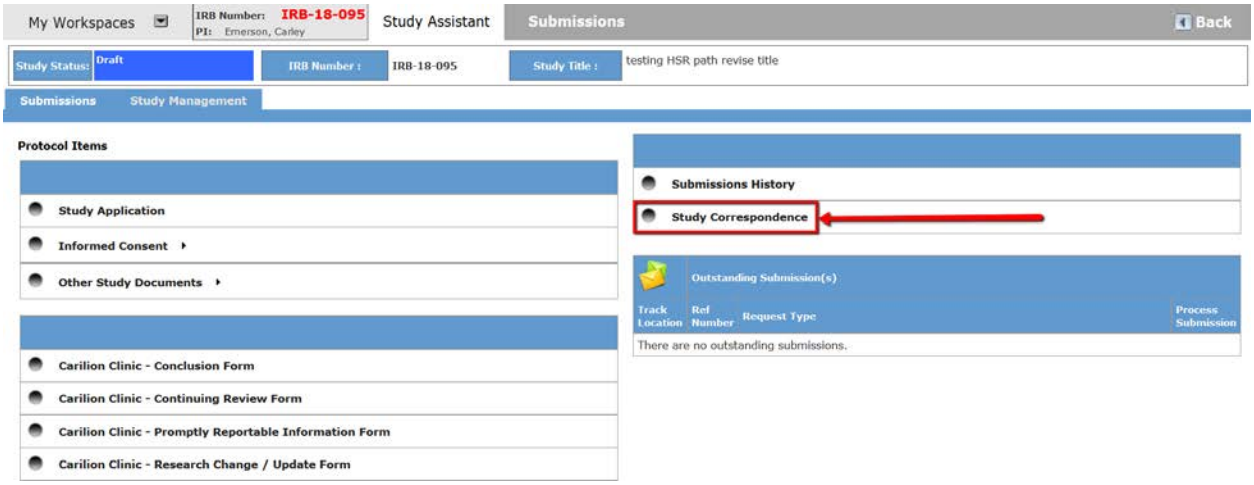
## Getting Help

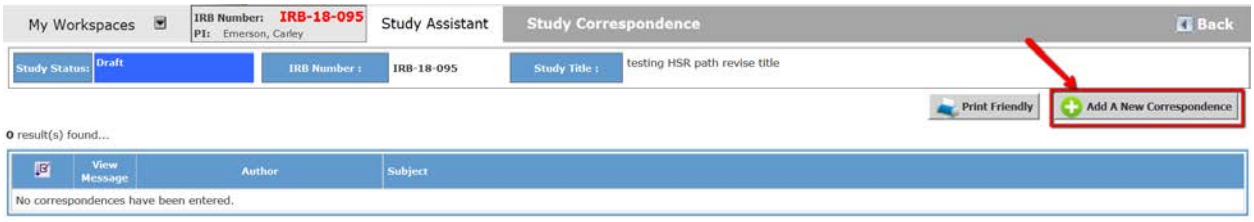
Once you are able to log in, the **Help** page is available in the system and contains User Guides to help you become acquainted with PRIS$^3$M. It is recommended that you carefully review these documents prior to using the system as well as any time you have a basic question.

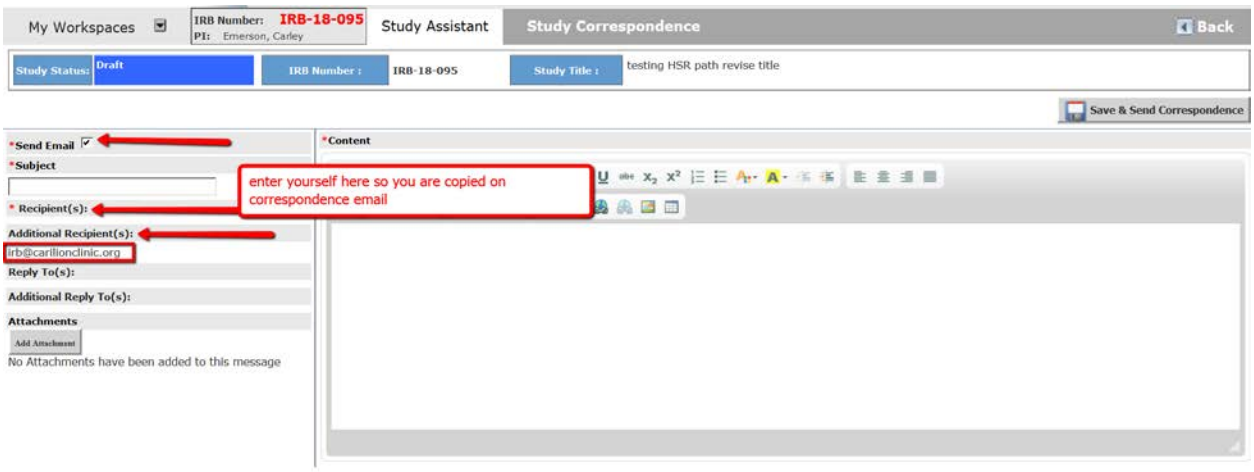
If your questions are not answered by the Help Desk resources or you need additional assistance, please complete a Help Ticket at https://is.gd/PRIS3M_IRB_Help_Form or if urgent, you may contact the **IRB Office** at **irb@carilionclinic.org.**

In addition, if you have a question about a particular application, click "Study Correspondence" button in the study dashboard, add yourself in the recipient field, and copy IRB@carilionclinic.org and an email will be sent to the IRB. The IRB's response will be documented in the correspondence log for that application.


Hello IRB Researcher your last login was 08-31-2018 13:13
Help
My Profile
Log out
My Workspaces
Study Assistant
Featured Study Operations
Create a New Study
View My Studies
Start a Study Submission Form
Track Approvals
Tasks
View All Study Tasks

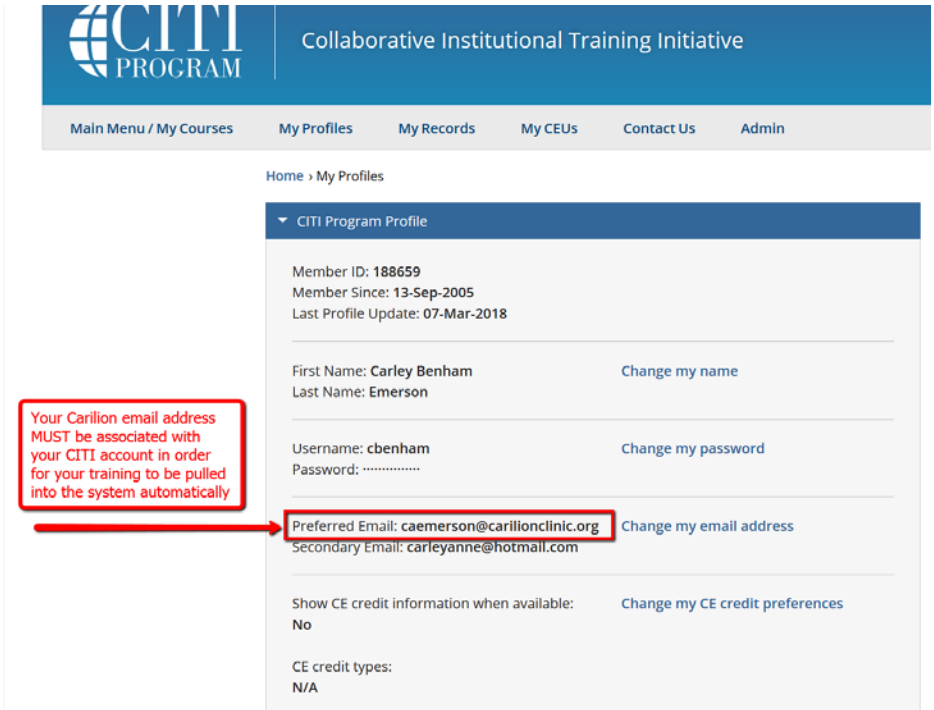

My Workspaces
IRB Number: IRB-18-095
PI: Emerson, Carley
Study Assistant
Submissions
Back
Study Status: Draft
IRB Number : IRB-18-095
Study Title : testing HSR path revise title
Submissions
Study Management
Protocol Items
Study Application
Informed Consent
Other Study Documents
Carilion Clinic - Conclusion Form
Carilion Clinic - Continuing Review Form
Carilion Clinic - Promptly Reportable Information Form
Carilion Clinic - Research Change / Update Form
Submissions History
Study Correspondence
Outstanding Submission(s)
Track Location
Ref Number
Request Type
Process Submission
There are no outstanding submissions.


My Workspaces
IRB Number: IRB-18-095
PI: Emerson, Carley
Study Assistant
Study Correspondence
Back
Study Status: Draft
IRB Number : IRB-18-095
Study Title : testing HSR path revise title
Print Friendly
Add A New Correspondence
0 result(s) found...
View Message
Author
Subject
No correspondences have been entered.




## CITI Training

All study team members MUST have completed the required CITI training courses BEFORE the IRB will begin reviewing the study. The system will receive a feed from CITI nightly with training certificates. In order for CITI training to be linked to your account in the system, all research team members must use their Carilion email address in CITI. Please ask all team members to go into CITI to verify their Carilion email address is used. If they use another email address, the system will not be able to link their training to their profile in the system, you will need to manually send their CITI training to the IRB, and your study will not be reviewed by the IRB until they complete their CITI training. Team members can verify their email address by going into CITI, selecting My Profiles, and verifying or adding their Carilion email address.



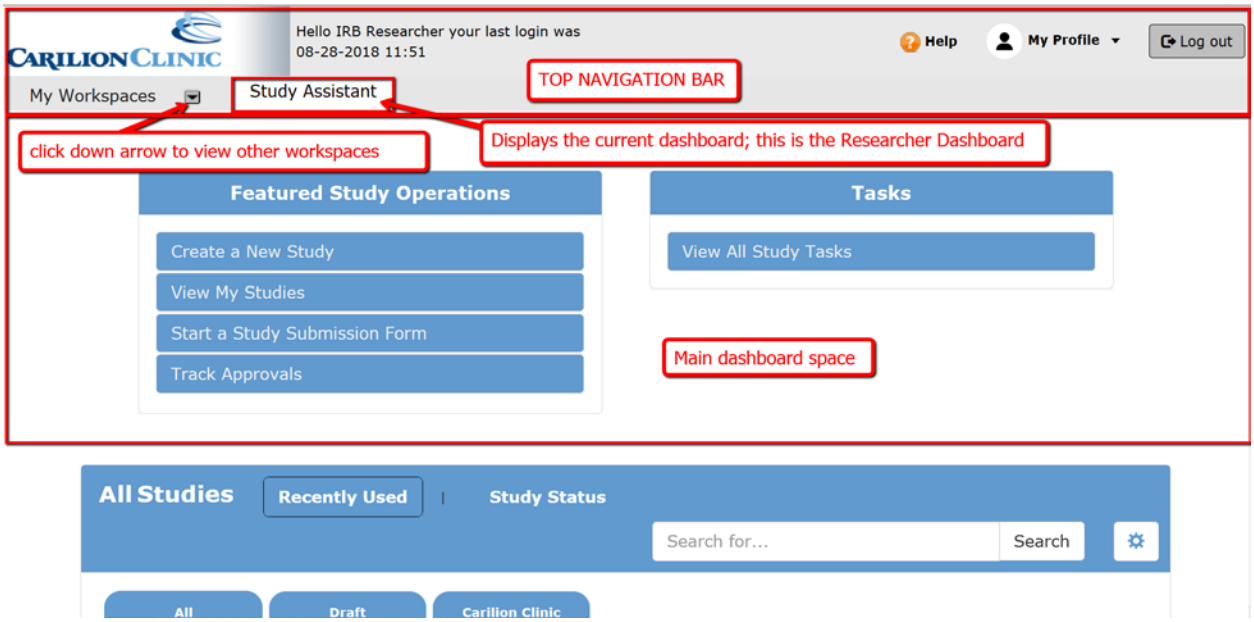
# Anatomy of the System

As a researcher/PI, when you log into the system will be taken to the "**Study Assistant**" dashboard, which contains the studies in which you are listed on the application. This can be considered your "home page". You can always return to this page by clicking on "My Workspaces" tab then selecting "Study Assistant/Study Workspace" at the top left of the screen (#2 below).

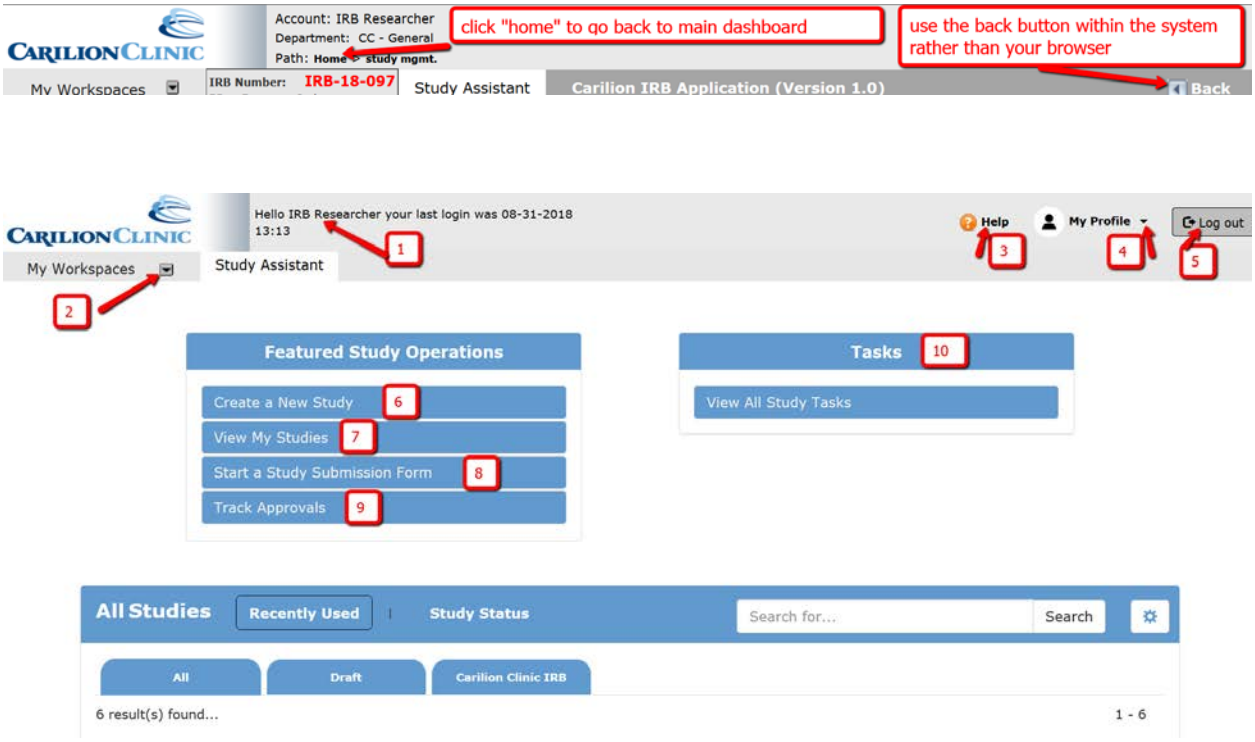
Your "**Study Assistant**" dashboard is dependent on the number of studies you have, the actions you have completed on those studies, and the actions pending on those studies. Everyone's dashboard will look different depending on these factors.

## The Study Assistant Dashboard contains two main sections:

1. Top Navigation Bar, which will be available on every page and on every dashboard. This bar allows you to toggle between dashboards if you have multiple roles. If you are a Board Member, you will also see the **IRB Assistant** role in the dropdown menu that will take you to your IRB Member Dashboard
2. Main Dashboard Space: This space displays study operations and tasks that are specific to you. Also allows you to toggle between dashboards if you have multiple roles. If you are a Board Member, you will also see the **IRB Assistant** role in the dropdown menu that will take you to your IRB Member Dashboard



**The screenshot below points out key areas to be familiar with:**




## Below is a description of each numbered item indicated on the workspace above. A more in depth description is below the numbered items:

1. **Greeting:** Your name and last log in will display here. Depending on the page you are on, you may also see your department affiliation (listed as Unassigned until the IRB updates this information) and path.

2. **My Workspaces:** Displays the Workspace you are in, which as a researcher is **Study Assistant.**

3. **Help** will guide you to any reference materials that have been developed to help navigate the system, as well as Carilion IRB Standard Operating Guidelines and resources *(please note these documents will continue to be expanded over time).*

4. **My Profile:** Allows you to access your account information, your document library, system announcements, and other important resources
    - **My account**: View/edit your profile information, including your name and email.

Please note that these fields in "Profile" are auto-populated from Carilion Clinic's Active Directory and cannot be edited.

- **My document library:** This acts as a personal repository for you to upload documents to store in the system (ie. consent forms, study documents, etc.). When uploading attachment(s) associated with a submission, you are able to select from the library (and you are also able to access any files on your local computer/available drives)

- **Announcements:** View any announcements that the system administrators have made (if there have been any new announcements since your last login, you will also receive a notification on the main home screen

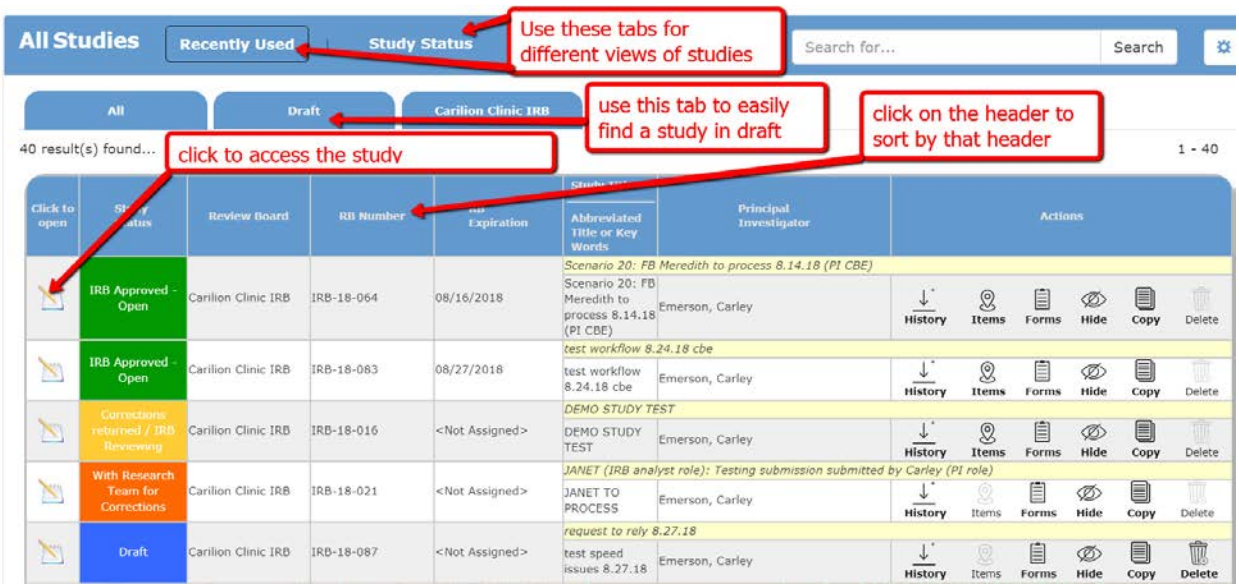
- **View Correspondence**: View any correspondence related to protocols that have been submitted and are being reviewed

5. **Logout:** will log you out of the system

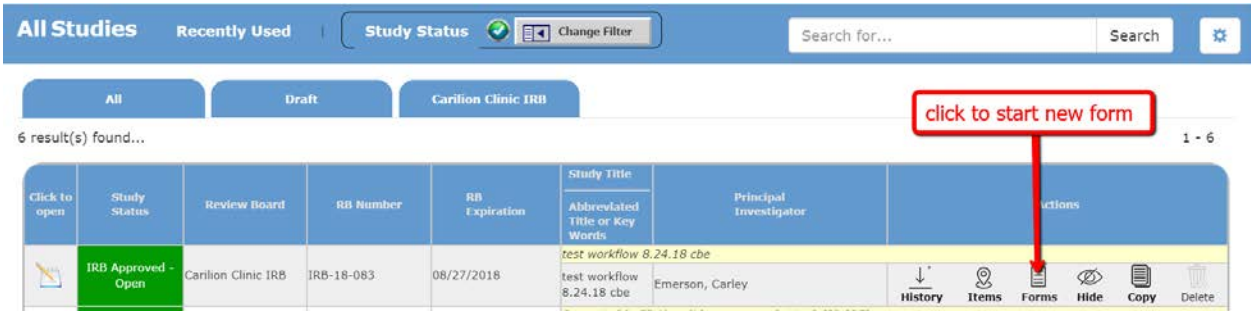
6. **Create a New Study:** This activity button allows you to create a New Application, including:
    - Human Subjects Research Study
    - Determination of Human Subjects Research (including QA/QI Determination)
    - Establishing a prospective Data or Specimens Research Repository
    - Humanitarian Use Device (non-research use)
    - Expanded Access or Compassionate Use
    - Single Patient Emergency Use
    - Preparatory to Research Application
    - IRB Grant Review ONLY for preliminary approval if required by funder
    - Requesting Carilion Clinic RELY on another IRB of Record

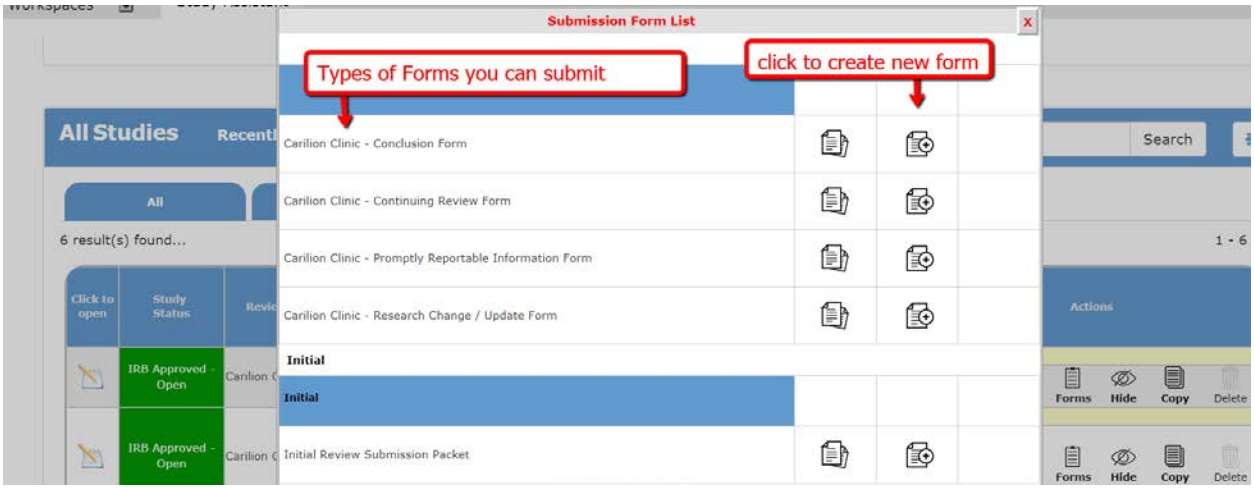
    Note: You will be taken through a few pages asking about the study title and study team then will be able to select the type of study you wish to submit.

7. **View My Studies:** Select this to view/edit any studies you have submitted previously and/or that you are developing currently. This section will show basic information about your studies and will provide you with the status and submission history of your studies. If you have started but not yet submitted a study, you will find it here and continue working on it. You can also open a study to review the application materials and/or to submit a continuing review request, IRB modification request, closure form, etc.



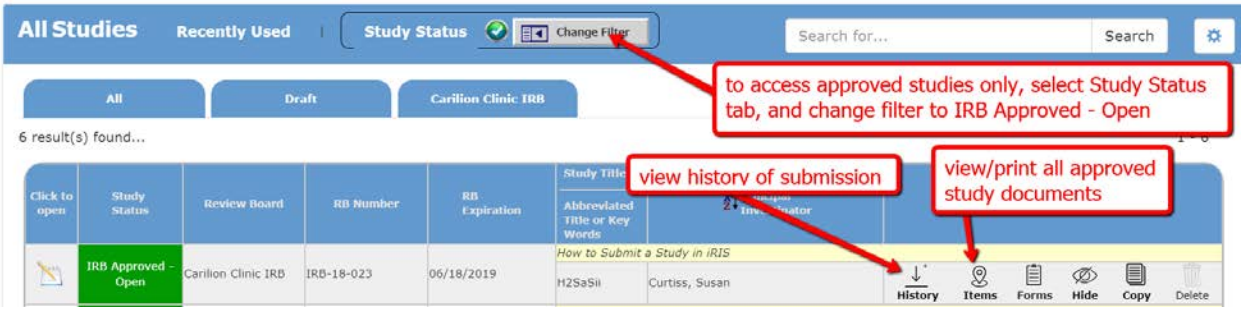

8. **Start a Study Submission Form:** Select this to submit a Post-approval form related to an already approved study, such as Continuing Review, Change Form, Promptly Reportable Event, Closure. It will take you to your list of studies, where you then select "Form" and select the type of form to submit.

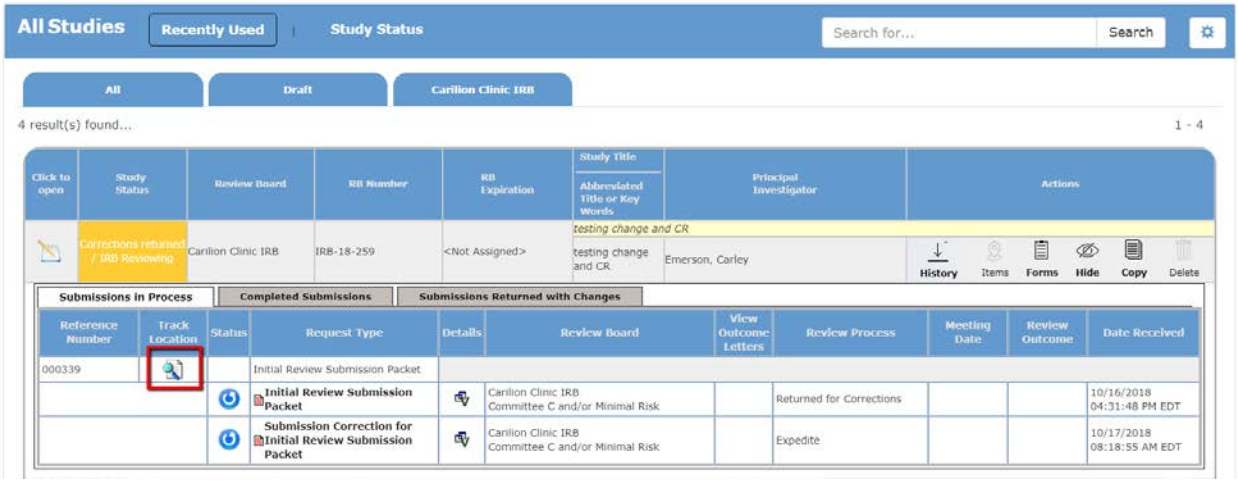




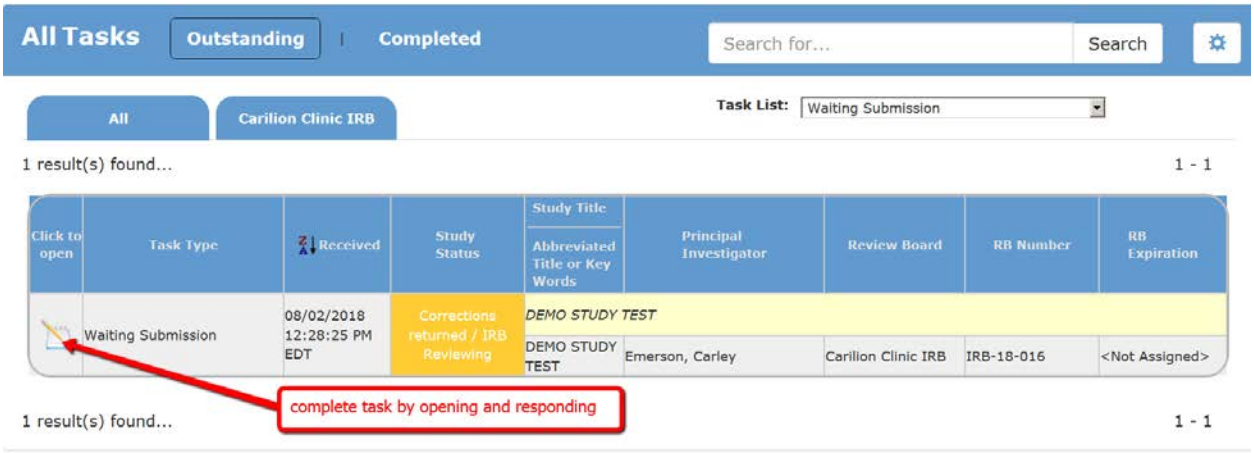

9. **Track Approvals:** This is where you will be able to open your study in order to access Study Documents, Consents, and Outcome Letters that have been approved by the board.

   You can view the study event history and location of any submission by clicking on the History button. To view in more detail, and determine the location of the application, click on "Track Location" icon.






10. **Tasks:** The 'All Tasks" section lists the tasks that are awaiting your response. When there is something in your queue awaiting response, you will receive an email notifying you of such. You can use the "tasks" button to more easily access the item awaiting your response. If you know the type of task you need to complete based on the email received, click on it and it will take you directly to that type of task by filtering out others.




**Note: Please refer to USER GUIDE - How to Submit a New Application_10.17.18 before creating a new submission.**