

User Guide: *Getting Started and Navigating the Study Assistant Dashboard in PRIS³M*

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 PRIS³M?

Carilion Clinic PRIS³M (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 PRIS³M 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 PRIS³M.

- 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 PRIS³M. 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.

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.			

My Workspaces IRB Number: **IRB-18-095** Study Assistant Study Correspondence [Back](#)

PI: Emerson, Carley

Study Status: **Draft** IRB Number: IRB-18-095 Study Title: testing HSR path revise title

[Save & Send Correspondence](#)

Send Email **Content**

* Subject

* Recipient(s): enter yourself here so you are copied on correspondence email

Additional Recipient(s): irb@carilionclinic.org

Reply To(s):

Additional Reply To(s):

Attachments

[Add Attachment](#)

No Attachments have been added to this message

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.

CITI PROGRAM Collaborative Institutional Training Initiative

[Main Menu / My Courses](#) [My Profiles](#) [My Records](#) [My CEUs](#) [Contact Us](#) [Admin](#)

Home > My Profiles

CITI Program Profile

Member ID: 188659
Member Since: 13-Sep-2005
Last Profile Update: 07-Mar-2018

First Name: Carley Benham [Change my name](#)
Last Name: Emerson

Username: cbenham [Change my password](#)
Password:

Your Carilion email address MUST be associated with your CITI account in order for your training to be pulled into the system automatically

Preferred Email: caemerson@carilionclinic.org [Change my email address](#)
Secondary Email: carleyanne@hotmail.com

Show CE credit information when available: [Change my CE credit preferences](#)
No

CE credit types:
N/A

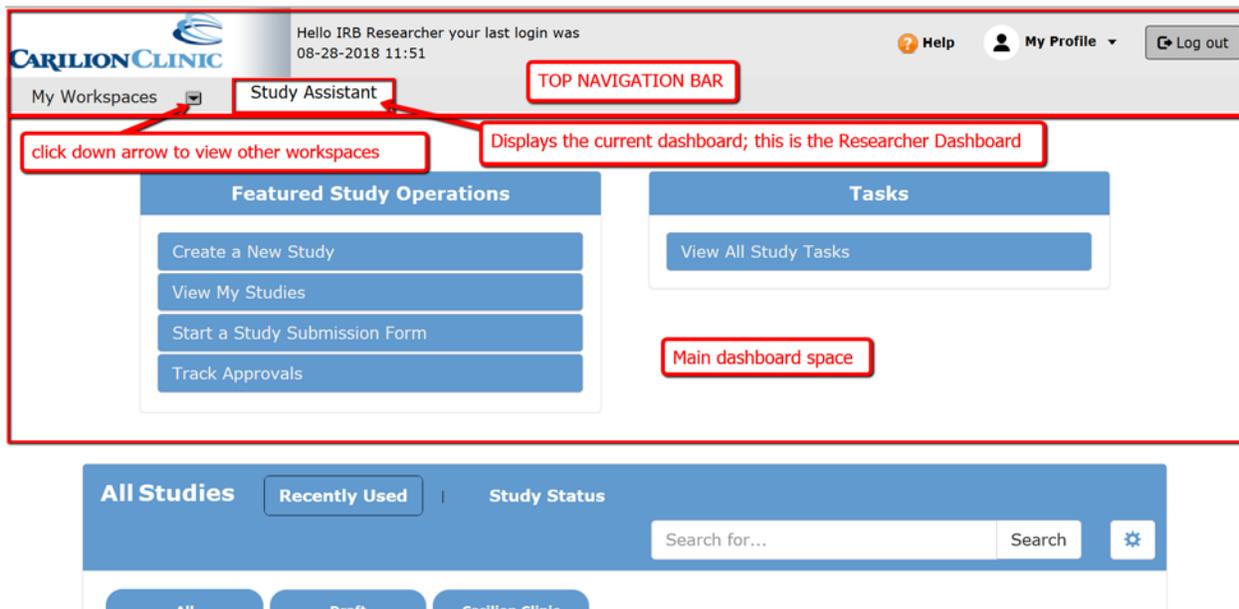
Anatomy of the System

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).

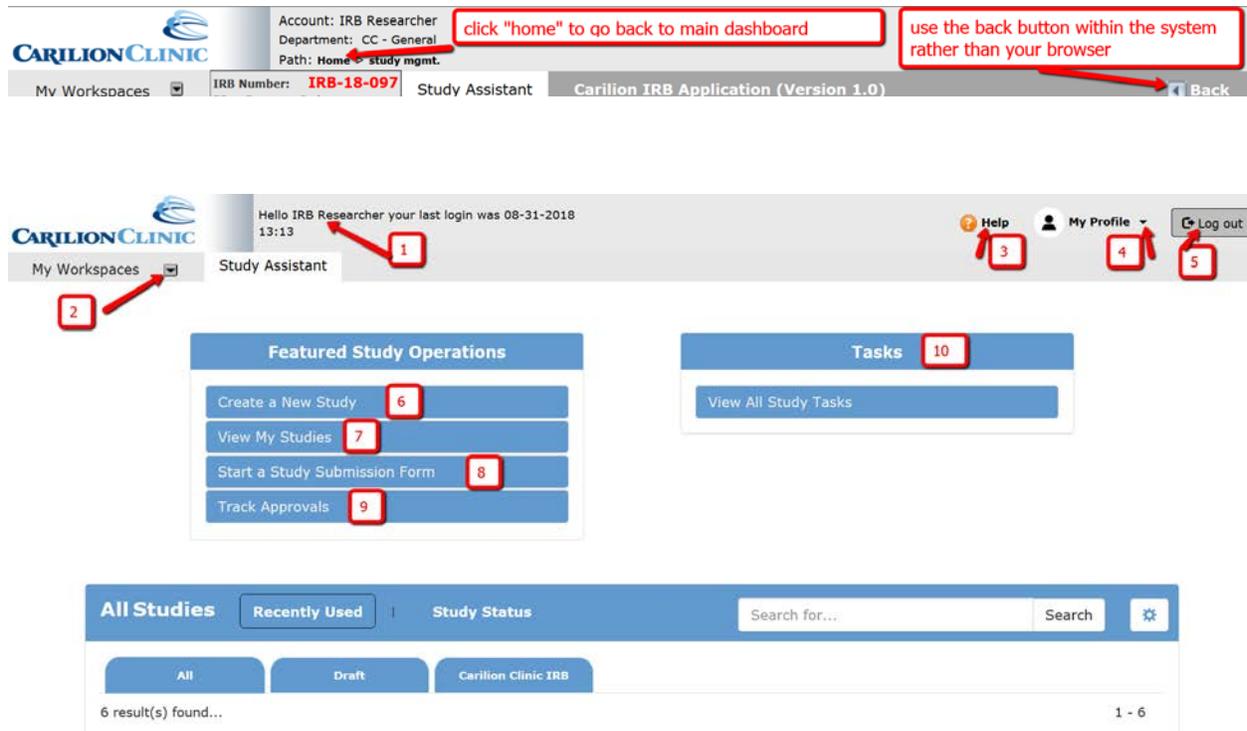
Your “**Study Assistant**” dashboard is dependent on the number of studies you have, the actions you have completed on those studies, and the actions pending on those studies. Everyone’s dashboard will look different depending on these factors.

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
 - o **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.

Use these tabs for different views of studies

use this tab to easily find a study in draft

click on the header to sort by that header

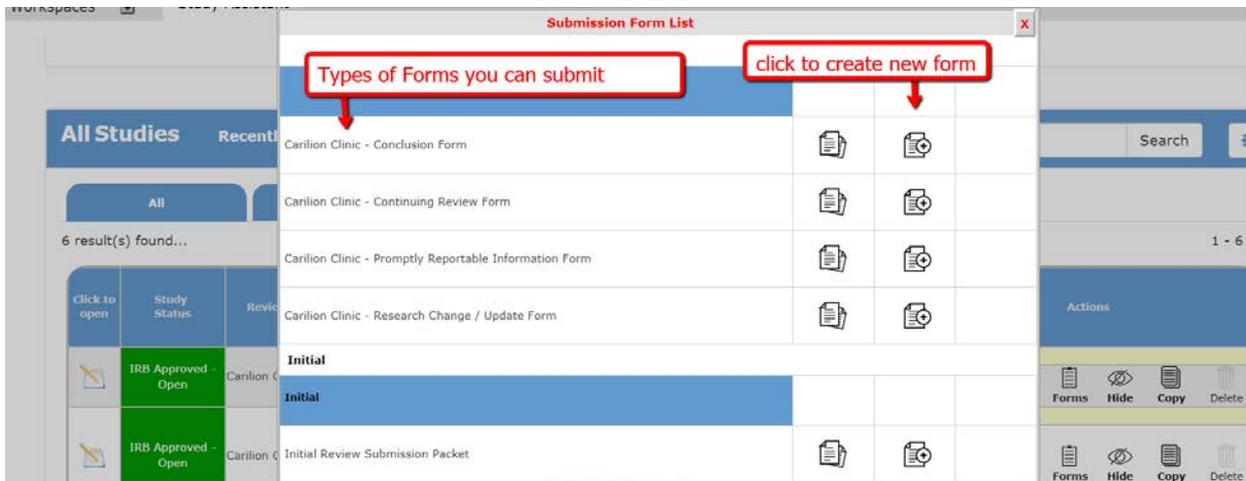
click to access the study

Click to open	Study Status	Review Board	RB Number	RB Expiration	Study Title Abbreviated Title or Key Words	Principal Investigator	Actions
	IRB Approved - Open	Carilion Clinic IRB	IRB-18-064	08/16/2018	Scenario 20: FB Meredith to process 8.14.18 (PI CBE)	Emerson, Carley	History, Items, Forms, Hide, Copy, Delete
	IRB Approved - Open	Carilion Clinic IRB	IRB-18-083	08/27/2018	test workflow 8.24.18 cbe	Emerson, Carley	History, Items, Forms, Hide, Copy, Delete
	Corrections returned / IRB Reviewing	Carilion Clinic IRB	IRB-18-016	<Not Assigned>	DEMO STUDY TEST	Emerson, Carley	History, Items, Forms, Hide, Copy, Delete
	With Research Team for Corrections	Carilion Clinic IRB	IRB-18-021	<Not Assigned>	JANET (IRB analyst role): Testing submission submitted by Carley (PI role)	Emerson, Carley	History, Items, Forms, Hide, Copy, Delete
	Draft	Carilion Clinic IRB	IRB-18-087	<Not Assigned>	request to rely 8.27.18	Emerson, Carley	History, Items, Forms, Hide, Copy, Delete

- 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.

click to start new form

Click to open	Study Status	Review Board	RB Number	RB Expiration	Study Title Abbreviated Title or Key Words	Principal Investigator	Actions
	IRB Approved - Open	Carilion Clinic IRB	IRB-18-083	08/27/2018	test workflow 8.24.18 cbe	Emerson, Carley	History, Items, Forms, Hide, Copy, Delete



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.



All Studies | Recently Used | Study Status | Search for... Search

All | Draft | Carillon Clinic IRB

4 result(s) found... 1 - 4

Click to open	Study Status	Review Board	RB Number	RB Expiration	Study Title Abbreviated Title or Key Words	Principal Investigator	Actions
	Corrections returned / IRB Reviewing	Carillon Clinic IRB	IRB-18-259	<Not Assigned>	testing change and CR	Emerson, Carley	History Items Forms Hide Copy Delete

Reference Number	Track Location	Status	Request Type	Details	Review Board	View Outcome Letters	Review Process	Meeting Date	Review Outcome	Date Received
000339			Initial Review Submission Packet							
			Initial Review Submission Packet		Carillon Clinic IRB Committee C and/or Minimal Risk		Returned for Corrections			10/16/2018 04:31:48 PM EDT
			Submission Correction for Initial Review Submission Packet		Carillon Clinic IRB Committee C and/or Minimal Risk		Expedite			10/17/2018 08:18:55 AM EDT

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.

All Tasks | Outstanding | Completed | Search for... Search

All | Carillon Clinic IRB | Task List: Waiting Submission

1 result(s) found... 1 - 1

Click to open	Task Type	Received	Study Status	Study Title Abbreviated Title or Key Words	Principal Investigator	Review Board	RB Number	RB Expiration
	Waiting Submission	08/02/2018 12:28:25 PM EDT	Corrections returned / IRB Reviewing	DEMO STUDY TEST	Emerson, Carley	Carillon Clinic IRB	IRB-18-016	<Not Assigned>

1 result(s) found... 1 - 1

complete task by opening and responding

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