Click® IACUC
Researcher's Quick Reference

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Before You Create a Protocol

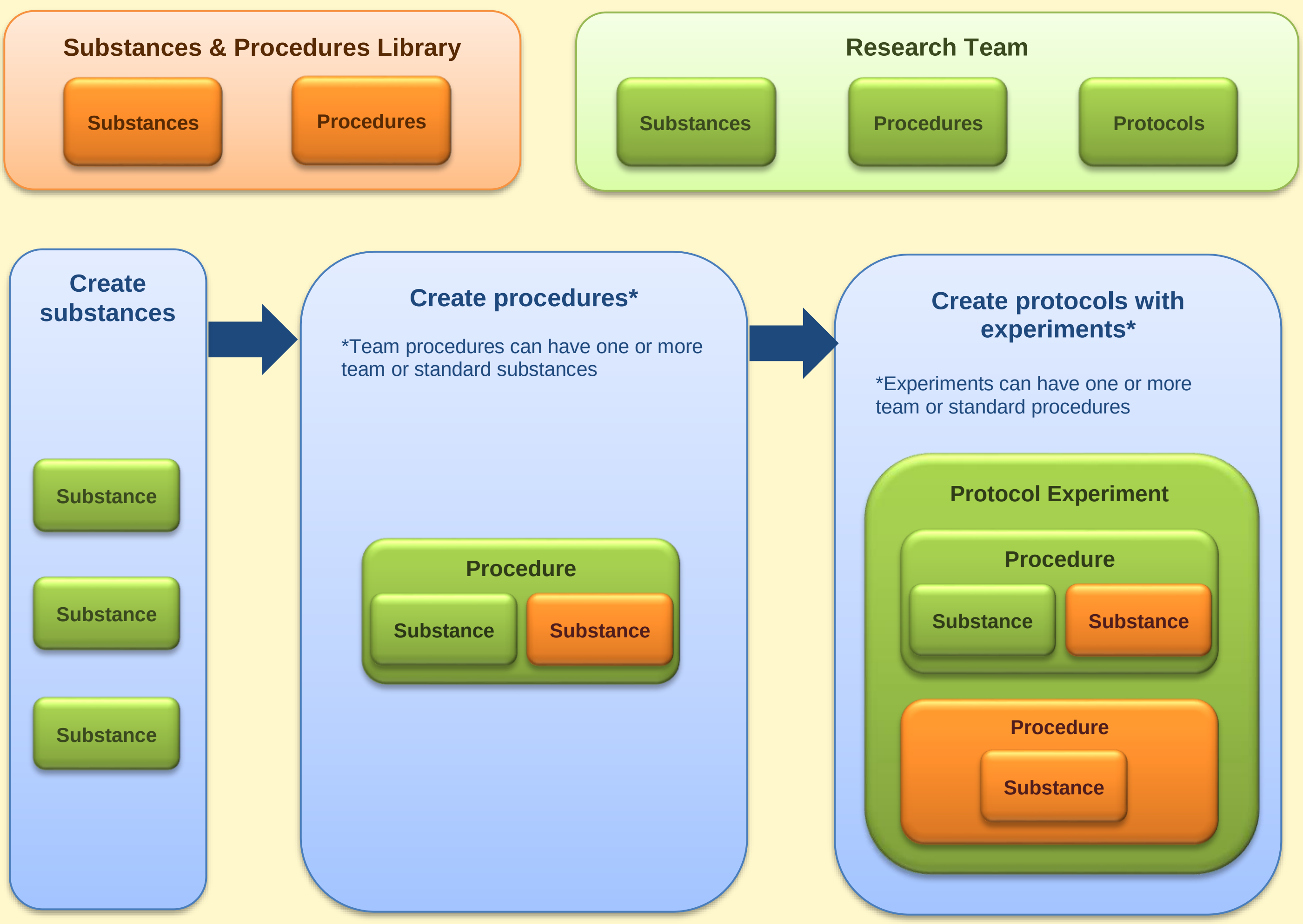
Plan out your protocol:

- ☐ Summarize the research (science), reasons for performing the research, and its benefits.
- ☐ Determine the experiments and the number of animals required.
- ☐ Determine the procedures you will perform and the substances required for your experiments.
- ☐ Identify any supporting documents to include in your protocol, such as flowcharts, explanations of the science, grant applications, and other information explaining or justifying your research.

Set up building blocks:

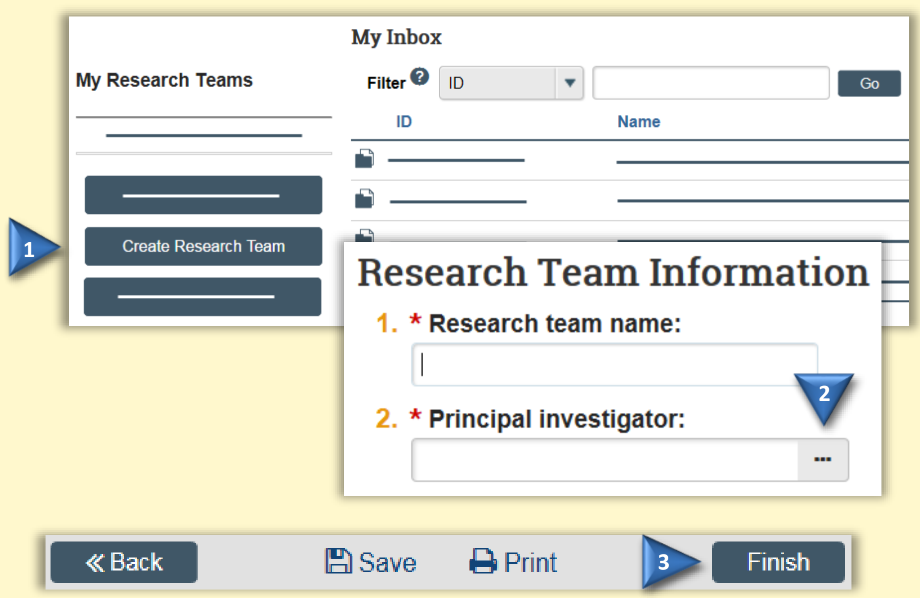
The diagram below shows the concept of building blocks. Once they are set up, you can create your protocol.

- ☐ Create a Research Team for the substances, procedures, and protocols you create.
- ☐ Check the IACUC standard library for the procedures and substances required for your protocol experiments (see Check for Building Blocks). If not in the library:
  - ☐ Create the missing substances
  - ☐ Create the missing procedures



Create a Research Team

As a member of a research team, you can create substances, procedures, and protocols for your research team. When you create a protocol, your research team members appear on the protocol by default.



Create Research Team

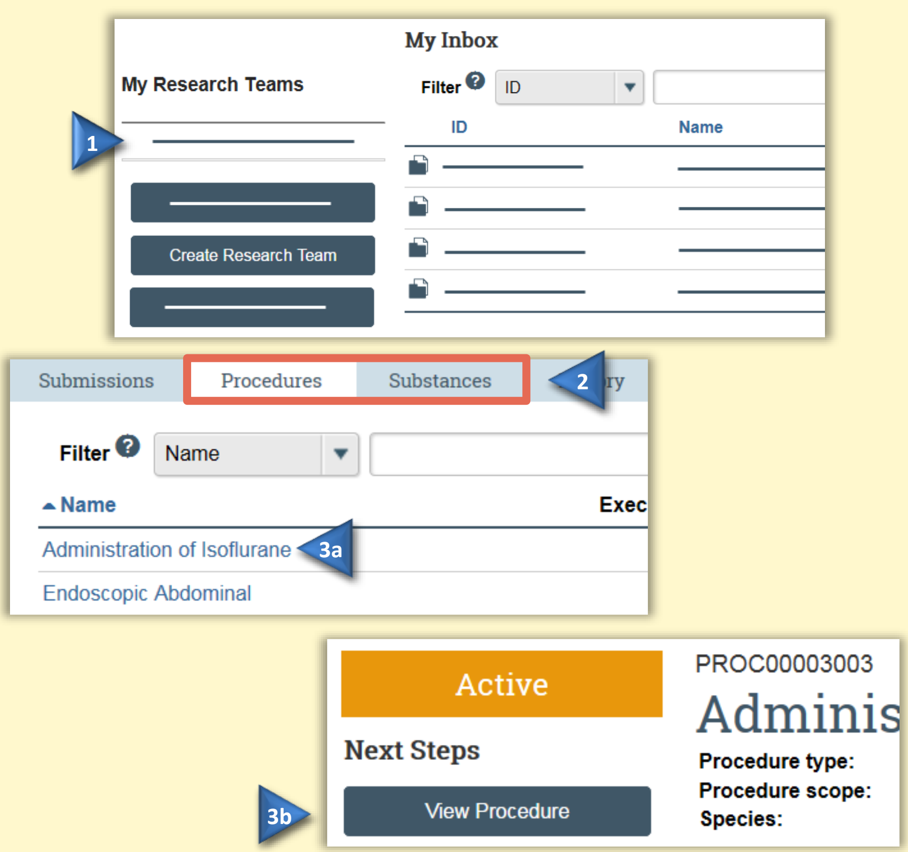
1. From My Inbox, click **Create Research Team**.
2. Type a name for the research team and select the team's PI.

   Note: If you are not the PI, add yourself as a team member if you will create team procedures and substances.
3. Complete the rest of the page and click **Finish**.

   You are taken to the research team workspace page.

Check for Existing Building Blocks

Check the system to see if there are IACUC standard building blocks that you can use in your protocols.

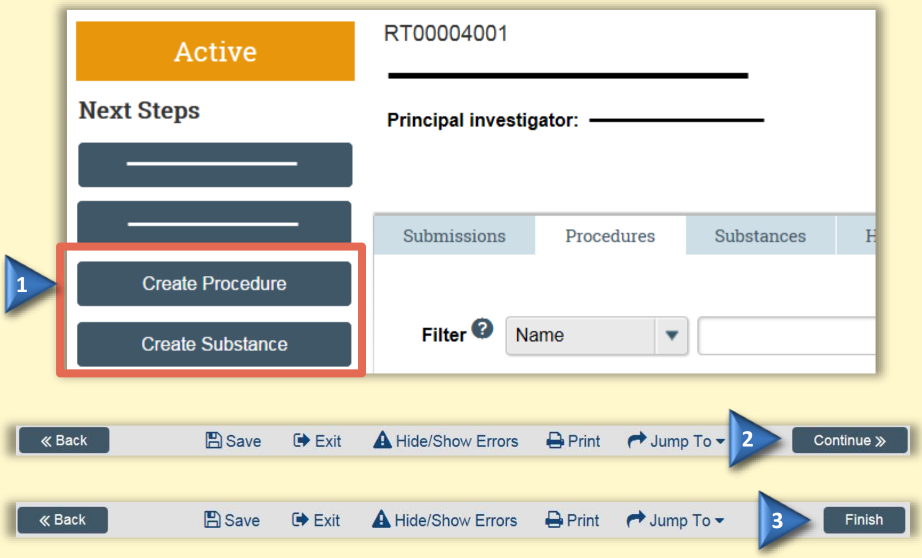


Check for Building Blocks

1. From My Inbox, click your research team on the left.
2. In the research team workspace, click the **Procedures** tab and check for the procedures you need. Do the same for substances (on the Substances tab). If missing, see Create Building Blocks.
3. If the building block exists, review its details:
   a. On the Procedures or Substances tab, click the item name.
   b. In the item's workspace, click **View Procedure** or **View Substance**.

Create Building Blocks

After you have checked the system for IACUC standard building blocks, create any that are required for your protocols.



Create a Substance or Procedure

1. From the research team workspace, click **Create Substance** or **Create Procedure**.

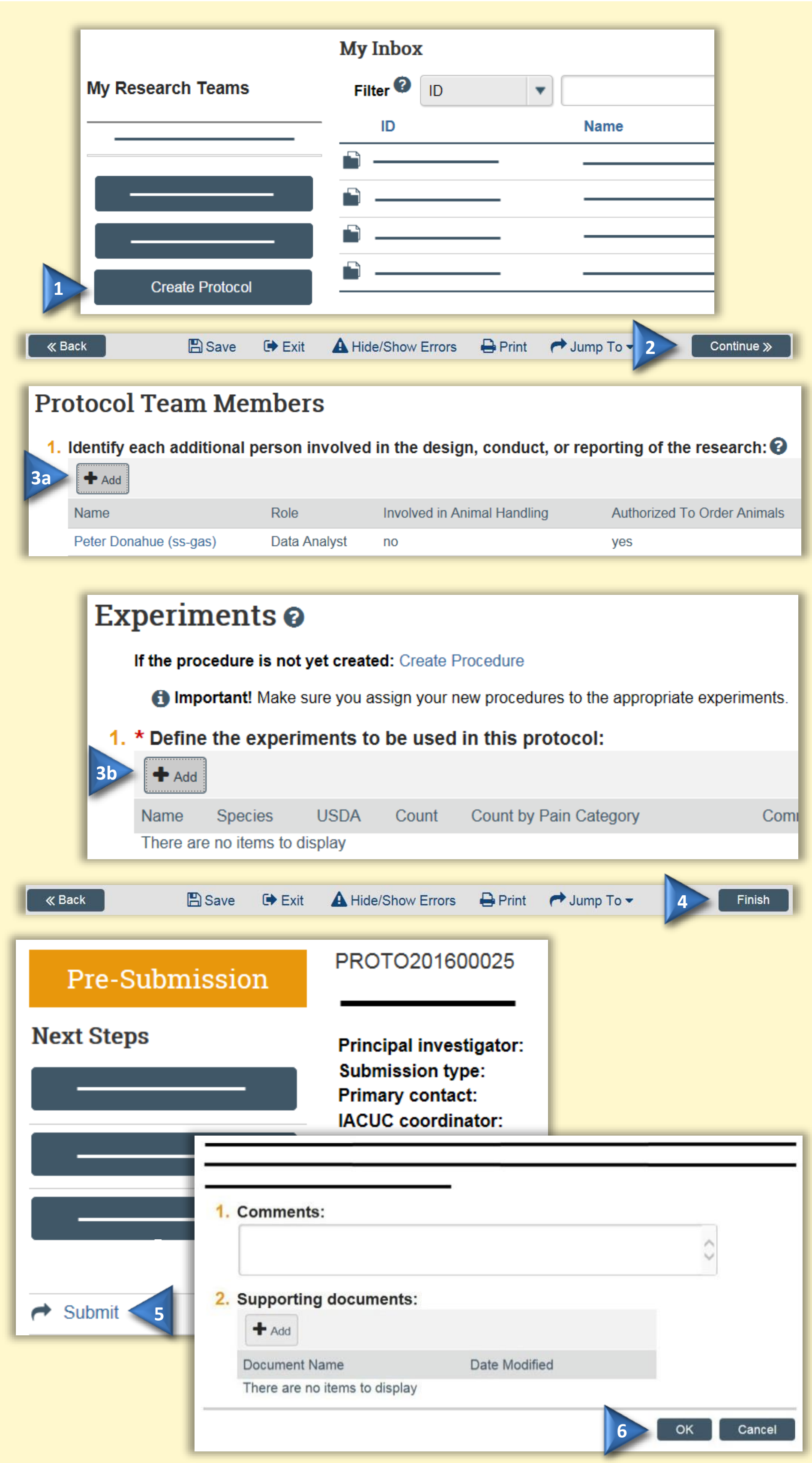
   Note: Create the substances you will use in your procedures before creating the procedures.

2. Complete the pages. If more than one page, click **Continue** to move to the next page.
3. When done, click **Finish**.

   You are taken to the research team's substance or procedure workspace page.

Create and Submit a Protocol

Once all the building blocks are set up, you are ready to create your protocol.



Create a Protocol

1. From the research team workspace or My Inbox page, click **Create Protocol**.
2. Complete the pages. Click **Continue** to move to the next page.
3. Pay attention to the following pages:
   a. **Protocol Team Members:** Add each person who will edit the protocol. Do not add the PI here.
   b. **Experiments:** When you add an experiment, select the procedures that apply to all animals (common procedures) and those that apply to some animals or are used differently across animals (variable procedures).
4. On the final page, click **Finish**.

   You are taken to the protocol workspace page. You can continue to edit the protocol (Edit Protocol button) until you submit it for review.

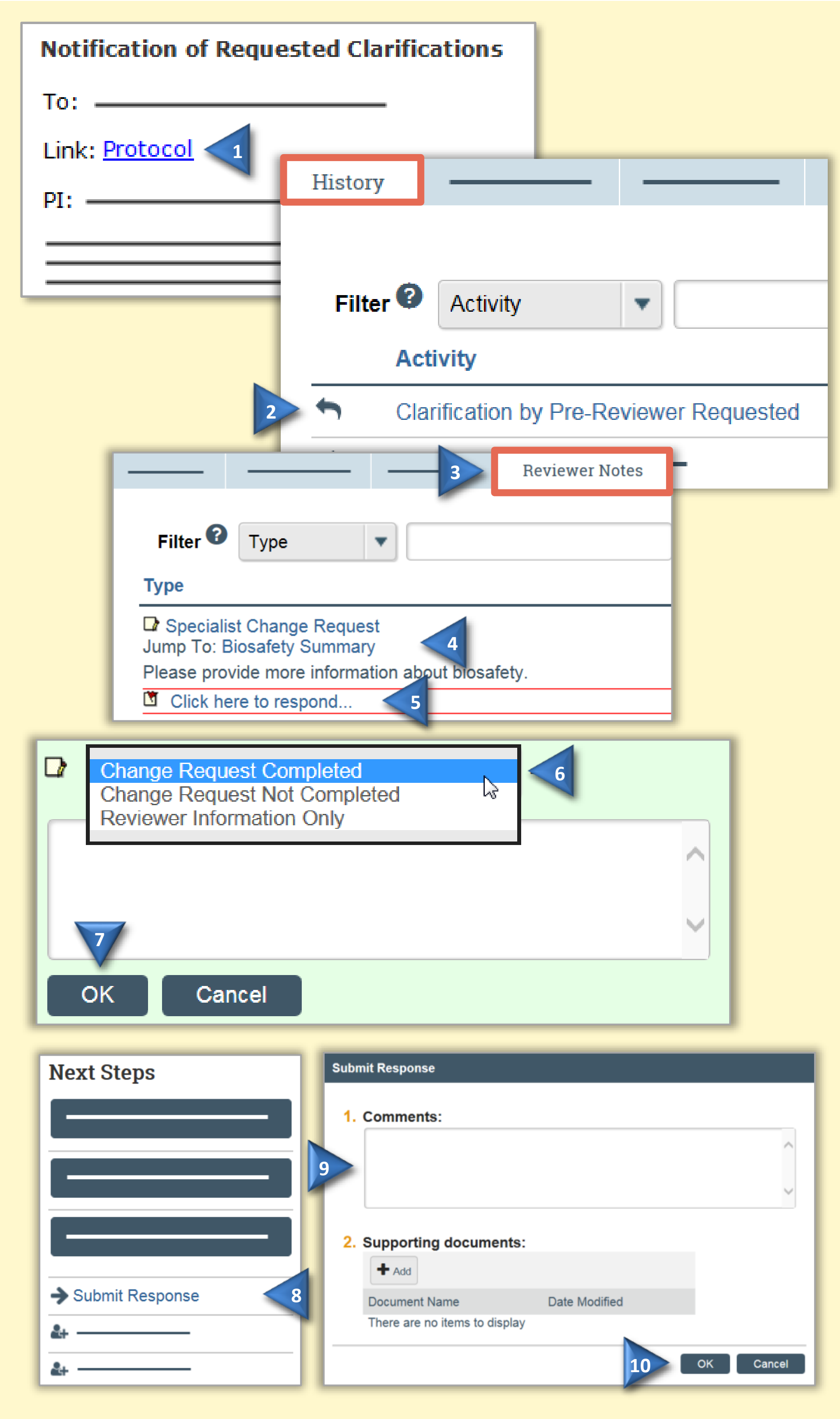
Submit a Protocol for Review

5. From the protocol workspace, click **Submit**.
6. Click **OK** to agree to the statement and submit the protocol for review.

   You can log off the system (top right).

Respond to Reviewer Requests

If a reviewer has questions or requires you to change your submission, you will receive an e-mail indicating this. Review the request details and then respond to the request.



Review the Request Details

1. Click the e-mail link to open the submission.

   If you no longer have the e-mail, see Open a Submission and then View History to see reviewer comments.

2. On the History tab, find the "Clarification Requested…" activity and read the comments.

3. If the reviewer added reviewer notes, click the **Reviewer Notes** tab and go to Respond to Reviewer Notes. If not, go to Submit Response.

Respond to Reviewer Notes

For each reviewer note:

4. To edit the protocol in response to the reviewer note, click the **Jump To** link.

5. From the protocol page or the Reviewer Notes tab, click the **Click here to respond** link.

6. Select a response from the list and explain your response in the box.

7. Click **OK**. If on a protocol page, exit the protocol when done.

Submit Response

8. On the protocol workspace, click **Submit Response**.

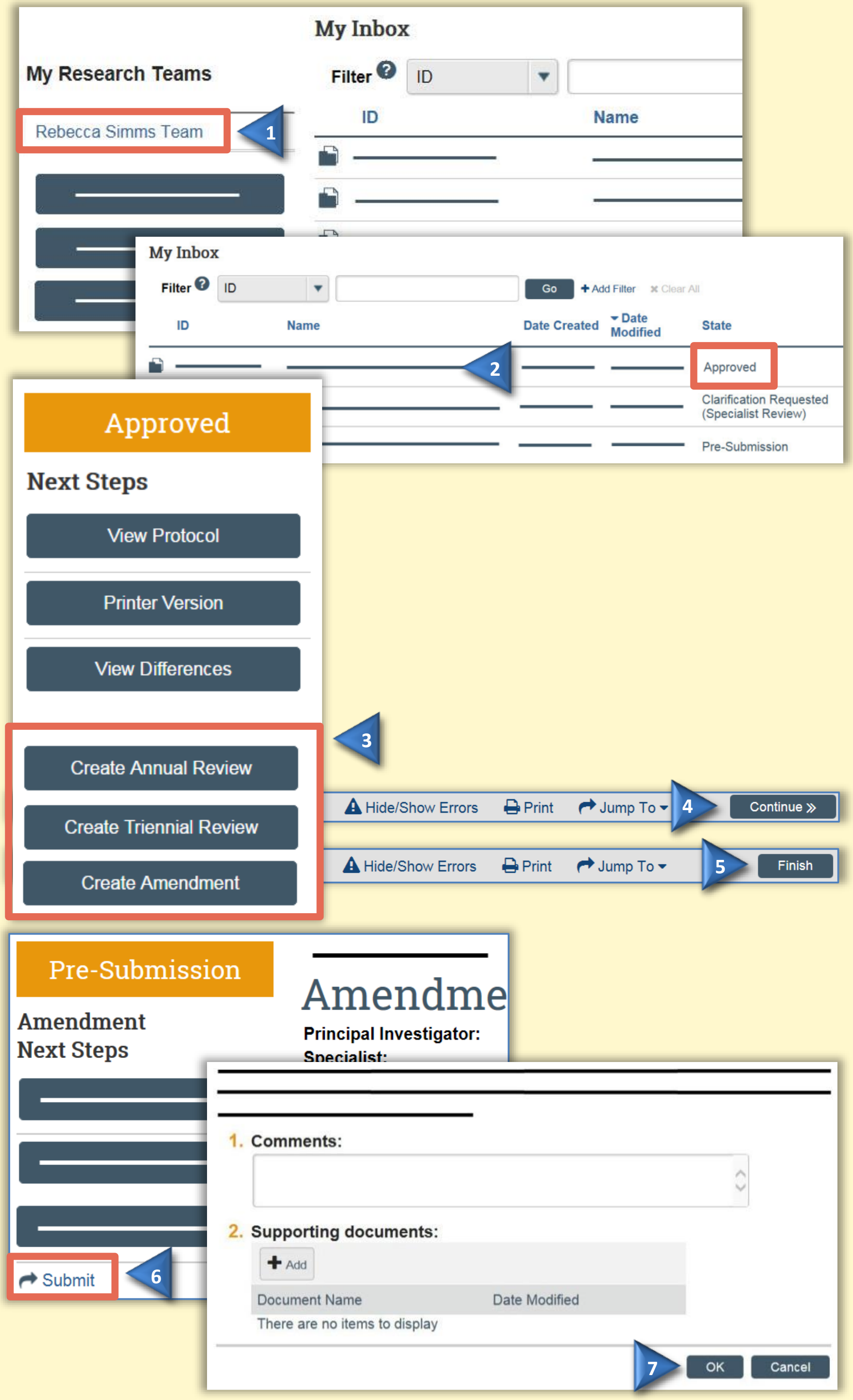
9. In the Comments box, explain your response to the reviewer.

10. Click **OK**.

    You can log off the system (top right).

Create and Submit a Follow-On Submission

If you need to make changes to an approved protocol (amendment) or submit an annual or triennial review, follow these steps. **Note:** For annual reviews, make sure you review all protocol information (e.g., team members, funding sources, activities, and approved and used animal numbers) and submit any needed amendments immediately. If an amendment is already in review, wait until the first amendment is processed.



Create a Follow-On Submission

1. From My Inbox, click the research team on the left.
2. Select the name of the approved protocol.
3. On the left, click the "**Create…**" button.
4. Complete the pages. Click **Continue** to move to the next page.
5. When done, click **Exit** and save changes or click **Finish** on the final page.

   You are taken to the submission's workspace page. You can continue to edit the submission ("Edit…" button) until you submit it for review.

Submit Follow-On Submission for Review

6. From the follow-on submission's workspace, click **Submit**.
7. Click **OK** to agree to the statement and submit it for review.

   You can log off the system (top right).

Navigation and Basic Tasks

When you first log in, you will be on the My Inbox page. This topic lists where to find submissions and the basic tasks you will perform.

Where do I find?

From My Inbox, you can find:

1. **Submissions** that require you to take action.
2. Your **research teams**.
3. **Actions** you can perform such as create a protocol.

What do I do?

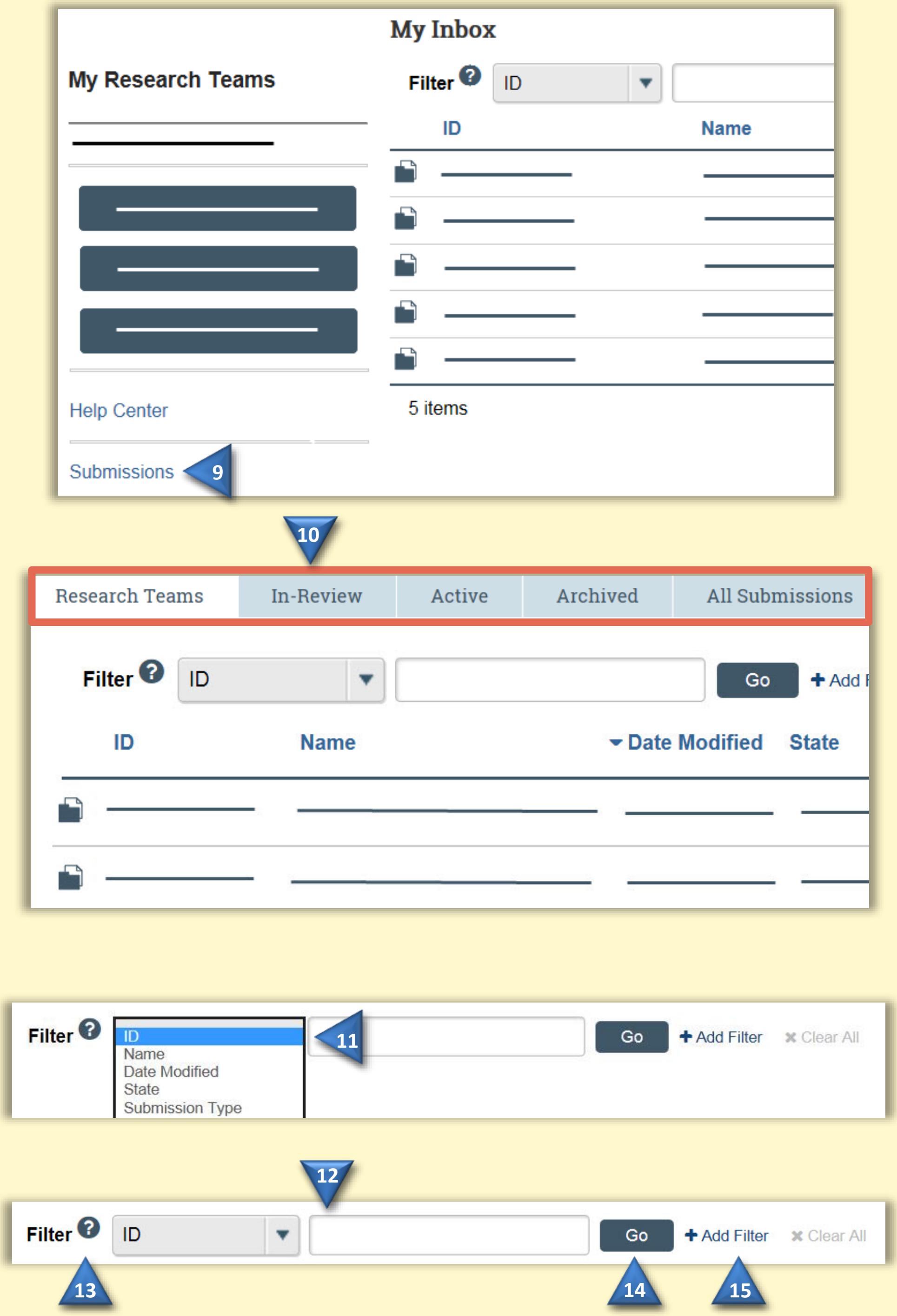
4. Review the state of submissions in My Inbox. The state gives a clue as to what to do next. For example, "Pre-Submission" means you haven't submitted the protocol. You can finish and submit it for review.

Open a Submission

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

View History

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



Find Previous Submissions

9. From My Inbox, click **Submissions**.

10. Click the appropriate tab to see your submissions:

- **In-Review:** All submissions undergoing IACUC review
- **Active:** All approved submissions
- **Archived:** All discarded and closed submissions
- **All Submissions:** All submissions, in any state

See also Search for Submissions Using Key Words.

To find specific data in a table, see Filter Data.

Filter Data

Many pages contain tables that you can filter to show specific data.

11. Select the column to filter by.

12. Type the beginning characters for the items you want to find. You can also type a % symbol as a wildcard before the characters. Examples:

- 71 shows all items beginning with 71
- %71 shows all items containing 71

13. For operators you can type in the text box, click the Help icon.

14. Click **Go** to apply the filter.

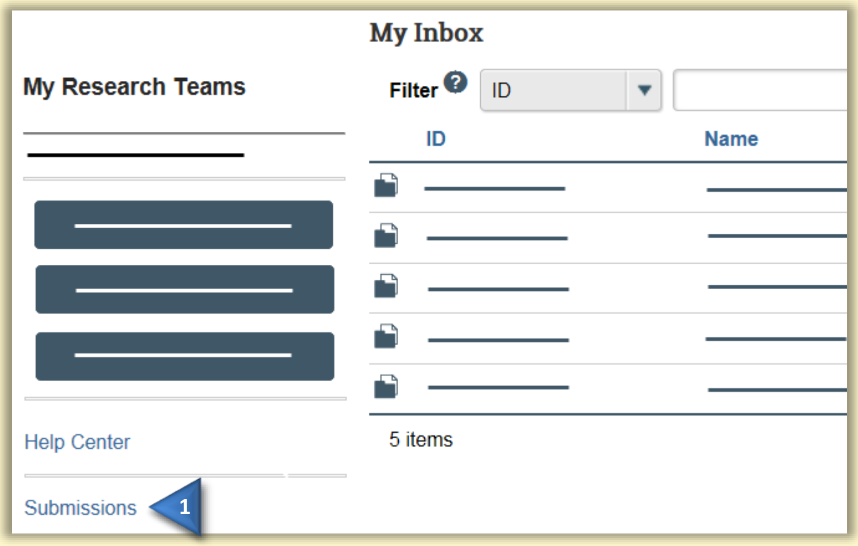
15. To combine multiple filter criteria, click **Add Filter**.

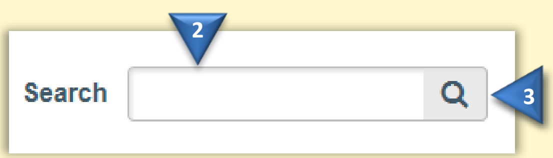
Search the System Using Key Words

You can also search for submissions using key words. For example:

- Submissions involving a specific PI
- Submissions that involve a certain substance or procedure

Note: The system will only return those items you have permission to view.





Search for Submissions

1. From My Inbox, click **Submissions**.
2. In the Search field, type your search criteria. You can use the following operators:
   - **And:** Finds all of the specified words.
   - **Or:** Finds at least one of the specified words.
   - **Not:** Excludes the specified word.
   - **Asterisk (*):** Wildcard character. Finds part of a word.
   - **Quotation marks:** Finds the exact phrase.
3. Press **ENTER** or click the magnifying glass to perform the search.

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1925 NW AmberGlen Pkwy

Suite 400

Beaverton, OR 97006