



Researcher User Manual

Creating a New Application

Audience: Principal Investigators & Project Team Members

PLEASE NOTE

Prior to leveraging the material in this manual, please make sure you have completed and understand the Basic User Manual. The manual can be found here

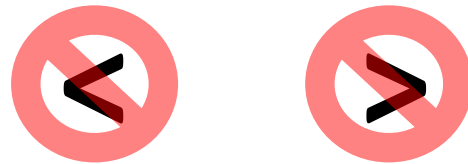
<https://rpresources.mun.ca/wp-content/uploads/2016/10/17.10.2016-Navigation-Manual.pdf>

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To avoid data loss, do **NOT** use the symbols < or > when entering information into the Researcher Portal. These symbols are unsupported.



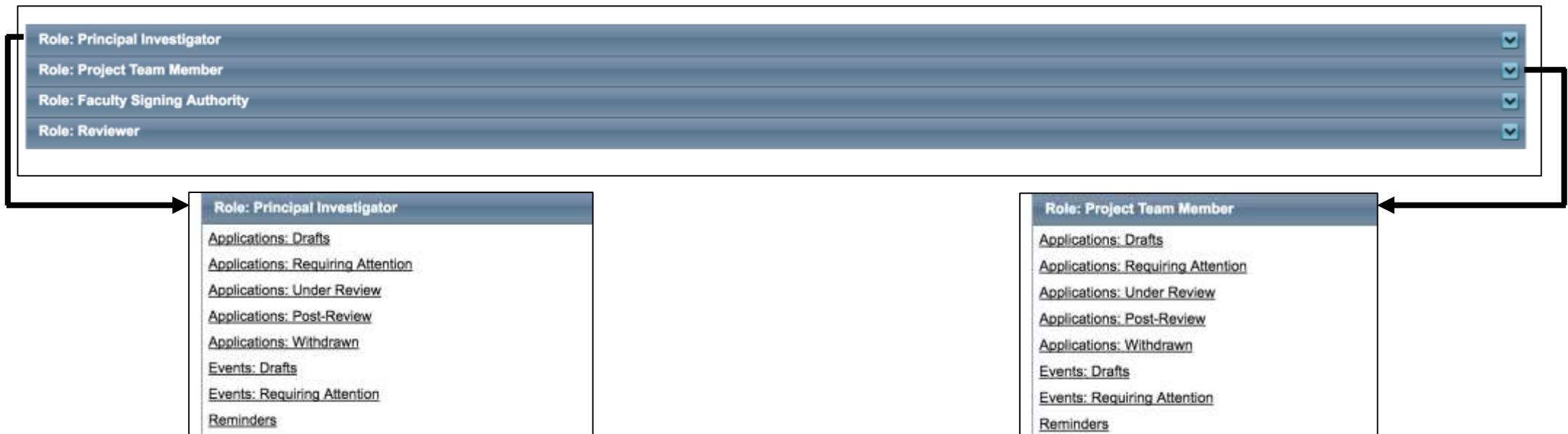
Using these symbols can cause issues such as loss of work and/or error messages.

Note that saving errors may occur, even if you do not receive an error message.

PI or Project Team Role Blocks

When you login to the Memorial Researcher Portal you will see the Home Page. The **Principal Investigator (PI) and Project Team Member Role Blocks** provide links that will direct you to application forms where you are a PI or project team member. All project team members can contribute to an application form prior to submission, however project team members cannot submit the application.

Only the PI can submit an application.



PI or Project Team Role Blocks Cont'd

- **Applications: Drafts:** This link contains ethics and funding applications in-progress that are saved but not yet submitted for review. Applications here can still be edited by the Principal Investigator or Project Team members.
- **Applications: Requiring Attention:** This link contains ethics and funding applications returned to the Principal Investigator and Project Team for revisions. Depending on the application type, these may have been returned by a signing authority, an ethics office or by the Research Initiatives & Services (RIS) department. The Principal Investigator and Project Team members can edit these applications.
- **Applications: Under Review:** This link contains ethics and funding applications submitted by the Principal Investigator and are currently under review. These applications are read-only.
- **Applications: Post Review:** This link contains post-review ethics and awards applications. These applications are read-only, however the Principal Investigator and Project Team Members can submit Event forms for these files, as well as Clone them.
- **Applications: Withdrawn:** This link contains applications that the Principal Investigator has withdrawn.

PI or Project Team Role Blocks Cont'd

- **Events: Drafts:** This link contains Event forms in-progress that are saved but not yet submitted for review. Event forms here can still be edited by the Principal Investigator or Project Team members.
- **Events: Requiring Attention:** This link contains Event forms returned to the Principal Investigator and Project Team for revisions. Depending on the Event form type, these may have been returned by a signing authority, an ethics office or by the Research Initiatives & Services (RIS) Department. The Principal Investigator and Project Team members can edit these forms.
- **Reminders:** This link contains ethics and funding files that have a deliverable due such as an annual renewal or report. The Principal Investigator and Project Team members can submit these as Event forms.

How to Start a New Application

Click the **APPLY NEW** button in the Middle Navigation Menu on the Memorial Researcher Portal Home Page.



The screenshot shows the Memorial Researcher Portal Home Page. At the top, there is a dark blue navigation bar with the text "Powered by Process Pathways | Product Info" on the left and "Welcome: John Doe | Home | My Profile | Contact Us | Help | Logout" on the right. Below this is a large banner area with the Memorial University logo on the left and the text "Memorial Researcher Portal" in the center. Underneath the banner is a light blue navigation bar containing "BACK TO HOME" on the left, "APPLY NEW" in the center (highlighted with a red box), and "News | Useful Links" on the right. At the bottom, there is a dark blue sidebar with two entries: "Role: Principal Investigator" and "Role: Project Team Member", each with a checkmark icon to its right.

New Application Forms

You will be brought to the New Application Forms page. The application names are hyperlinked. To start a new application, click the name of the application you wish to choose. A new application will be launched. **Please ensure you are filling out the proper form by consulting the “Ethics Application Screening Tool” located on <https://rpresources.mun.ca/triage/>**



The screenshot shows the Memorial Researcher Portal interface. At the top, there is a navigation bar with the text "Powered by Process Pathways" on the left and "Welcome, John Doe" followed by links for "Home", "My Profile", "Contact Us", "Help", and "Logout" on the right. Below this is a header banner with the Memorial University logo on the left and the text "Memorial Researcher Portal" in the center. A secondary navigation bar contains the text "APPLY NEW | News | Useful Links | Settings".

The main content area is titled "New Application Forms" and is divided into two sections:

- Interdisciplinary Committee on Ethics in Human Research (ICEHR)**

Application Name	Description	Status
ICEHR - Application for Ethics Review	Application for ethics review for research in the social sciences and humanities for MUN faculty, staff, and student research on St. John's campus.	Open
ICEHR - Application for Secondary Review	Application for ethics review for secondary research in the social sciences and humanities by MUN faculty, staff, and student research on St. John's campus.	Open
ICEHR - Application for Ethics Review (Sub-Project)	Application for ethics review for research in the social sciences and humanities by students working on a sub-portion of a faculty member's already approved project as part of their dissertation, thesis, or other degree requirements. Researchers are required to consult with ICEHR prior to completing this application form to determine eligibility. For MUN faculty, staff, and student research on St. John's campus ONLY.	Open
- Grenfell Campus Research Ethics Board (GC-REB)**

Application Name	Description	Status
GC-REB - Application for Ethics Review Form	Application for ethics review for research in the social sciences and humanities for MUN faculty, staff, and student research on Grenfell	Open

Application Action Buttons

The buttons that appear at the top of an application are the **Application Action** buttons. Select these buttons to:

- **Save:** Save any changes to the application.
- **Close:** Exit the application and return to the Memorial Researcher Portal Home Page.
- **Print:** Print the application in the pre-set layout.
- **Export to Word:** Open the application as a Word Document.
- **Export to PDF:** Open the application as a PDF.
- **Submit:** Submit the application to the pre-routed body.
- **Withdraw:** Withdraws the application and moves the application to Applications: Withdrawn.



The screenshot displays the Memorial Researcher Portal interface. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". The main content area shows "Application Ref No: 8540" and "Application Form: HREB Application for General Research". A red box highlights a row of seven buttons: Save, Close, Print, Export to Word, Export to PDF, Submit, and Withdraw. Below the buttons is a tabbed interface with tabs for "Project Info", "Project Team Info", "HREB Application for General Research", "Attachments", "Approvals", "Logs", and "Errors". The "HREB Application for General Research" tab is active, showing a "Title *" field.

Application Tabs

At the top of any application is a list of tabs that you will complete prior to submitting the application. A tab that has a **red asterisk *** indicates that there are required field(s) that must be completed prior to submission. Once you complete all the required fields in that tab, the asterisk will disappear. The subsequent slides will further explain each individual tab.

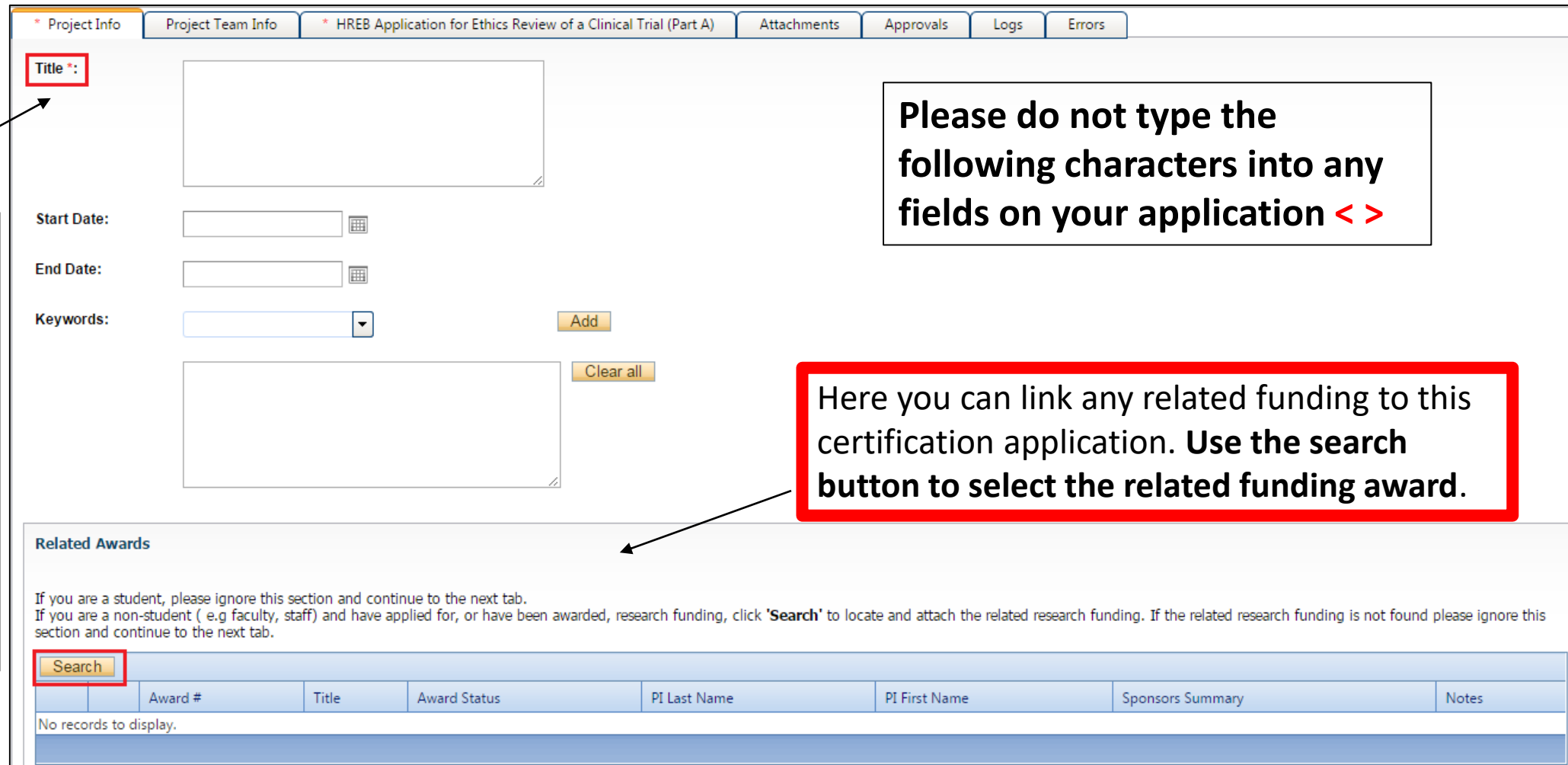
NOTE: Click **Save** as often as possible while completing your application!




The screenshot shows a web application interface. At the top, it says "Powered by Process Pathways". Below that, the "Application Ref No: 8540" is displayed. On the right side, it says "Application Form". A row of buttons is visible: Save, Close, Print, Export to Word, Export to PDF, Submit, and Withdraw. Below the buttons is a horizontal tab bar with several tabs: "* Project Info", "Project Team Info", "* HREB Application for General Research", "Attachments", "Approvals", "Logs", and "Errors". The tabs with red asterisks are highlighted with a red border. Below the tabs, there is a form field labeled "Title *:".


Project Info Tab


This tab is where you enter basic information about your application.



Title *

Start Date: 

End Date: 

Keywords: 

Related Awards

If you are a student, please ignore this section and continue to the next tab.
If you are a non-student (e.g faculty, staff) and have applied for, or have been awarded, research funding, click '**Search**' to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.

Award #	Title	Award Status	PI Last Name	PI First Name	Sponsors Summary	Notes
No records to display.						

IMPORTANT: Please note that all fields that have a red asterisk * are required. Failing to complete these fields will prevent the PI from submitting the application. See [Errors Tab](#) for more information.

Please do not type the following characters into any fields on your application < >

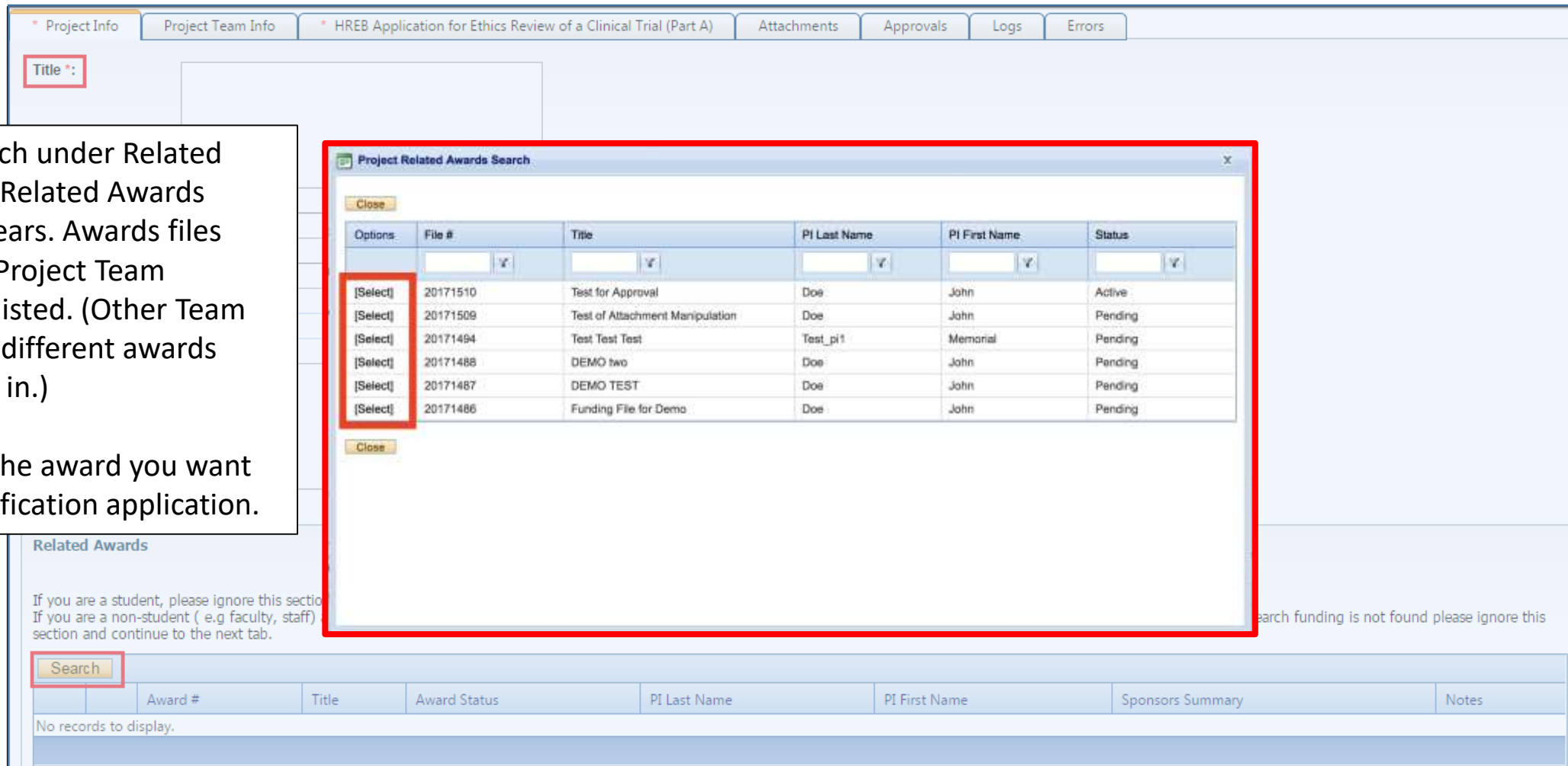
Here you can link any related funding to this certification application. Use the search button to select the related funding award.

Project Info Tab Cont'd

This tab is where you enter basic information about your application.

When you click Search under Related Awards, the Project Related Awards Search window appears. Awards files that you were PI or Project Team Member for will be listed. (Other Team Members may have different awards listed when they log in.)

Click Select next to the award you want to link with the certification application.



The screenshot shows the 'Project Info' tab in a web application. The main content area is titled 'Project Info' and contains a 'Title *:' field. Below this, there is a 'Related Awards' section with a 'Search' button. A 'Project Related Awards Search' window is open, displaying a table of awards. The table has columns for 'Options', 'File #', 'Title', 'PI Last Name', 'PI First Name', and 'Status'. The 'Options' column contains '[Select]' buttons for each row. The table lists six awards with various titles and statuses.

Options	File #	Title	PI Last Name	PI First Name	Status
[Select]	20171510	Test for Approval	Doe	John	Active
[Select]	20171509	Test of Attachment Manipulation	Doe	John	Pending
[Select]	20171494	Test Test Test	Test_pi1	Memorial	Pending
[Select]	20171488	DEMO two	Doe	John	Pending
[Select]	20171487	DEMO TEST	Doe	John	Pending
[Select]	20171486	Funding File for Demo	Doe	John	Pending

Project Info Tab Cont'd

This tab is where you enter basic information about your application.

Once added, award information will display under Related Awards on the Project Info tab.

To add notes about the award, click **Edit**. *You cannot change any other information about the award.*

To remove the link to the award from the application, click **Delete**.

Related Awards

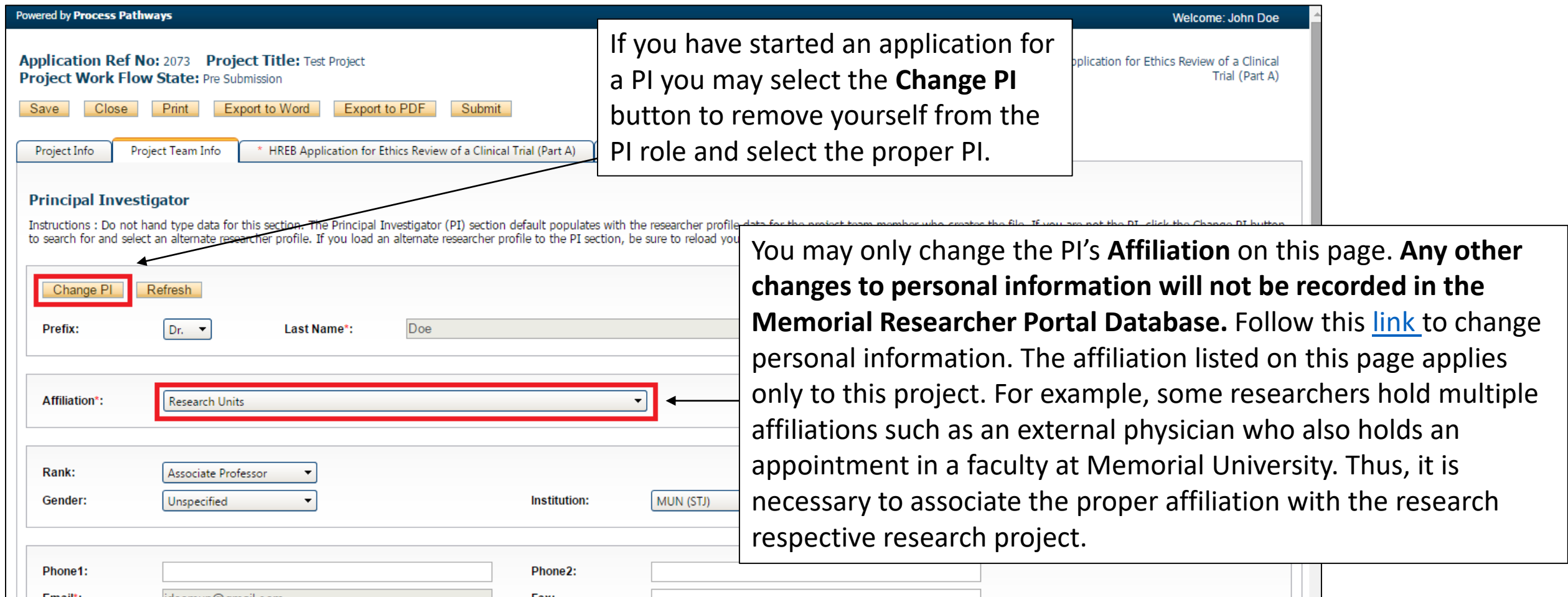
If you are a student, please ignore this section and continue to the next tab.
If you are a non-student (e.g faculty, staff) and have applied for, or have been awarded, research funding, click '**Search**' to locate and attach the related research funding. If the related research funding is not found please ignore this section and continue to the next tab.

		Award File No	Title	Award Status	PI Last Name	PI First Name	Sponsors Summary	Notes
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	20171486	Funding File for Demo	Pending	Doe	John	SSHRC Program: Research Type: Grant Requested: CAD 0.00 Awarded: CAD 0.00 PROJECT TOTALS:	

Note to researchers with awards with confidential components: Keep in mind that basic information about the linked award, as seen in the example above, will be visible to all Project Team Members on your ethics application.

Project Team Info Tab

This tab will allow you to add and change members on your research team.



Powered by Process Pathways

Welcome: John Doe

Application Ref No: 2073 Project Title: Test Project
Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info * HREB Application for Ethics Review of a Clinical Trial (Part A)

Principal Investigator

Instructions : Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile data for the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. If you load an alternate researcher profile to the PI section, be sure to reload you

Change PI Refresh

Prefix: Dr. Last Name*: Doe

Affiliation*: Research Units

Rank: Associate Professor

Gender: Unspecified Institution: MUN (STJ)

Phone1: Phone2:

Email*: Fax:

If you have started an application for a PI you may select the **Change PI** button to remove yourself from the PI role and select the proper PI.

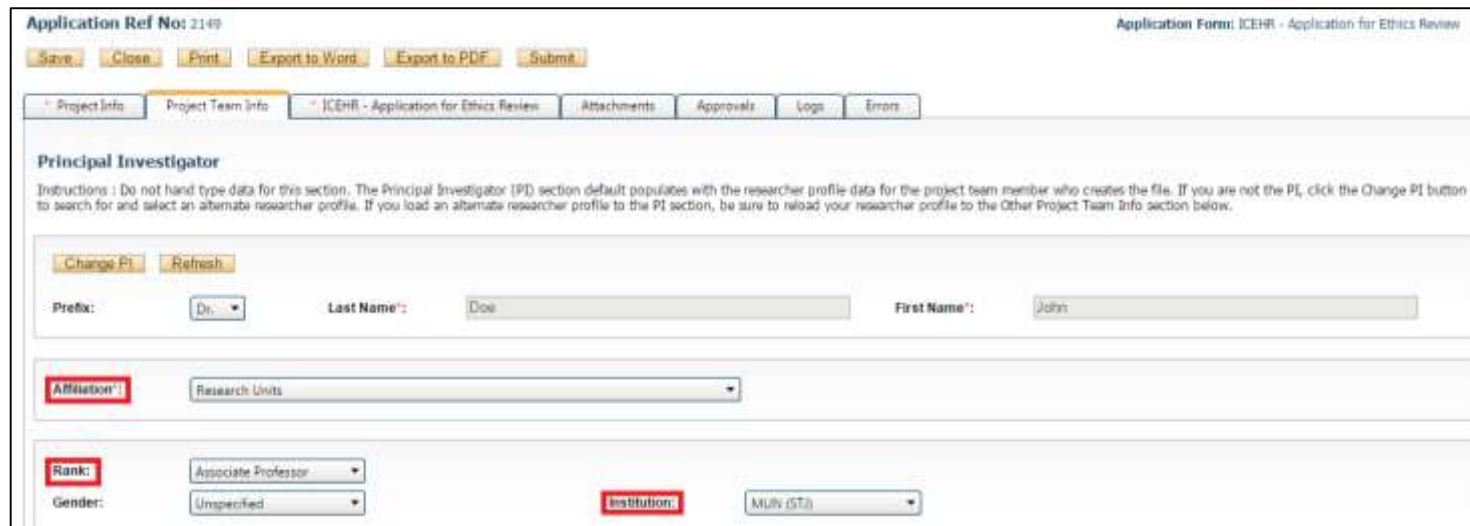
You may only change the PI's **Affiliation** on this page. **Any other changes to personal information will not be recorded in the Memorial Researcher Portal Database.** Follow this [link](#) to change personal information. The affiliation listed on this page applies only to this project. For example, some researchers hold multiple affiliations such as an external physician who also holds an appointment in a faculty at Memorial University. Thus, it is necessary to associate the proper affiliation with the research respective research project.

Researchers with Multiple Affiliations

- An affiliation is the University faculty that the research and researcher is associated with. This is considered an internal affiliation. If the research is not associated with a University faculty it is considered External. Researchers may have multiple affiliations.
- If your account does not have the appropriate affiliation in the drop down menu or you require an additional affiliation please submit the Update Research Portal Account Form at <https://rpresources.mun.ca/request-romeo-account/update-research-portal-account/>

Rank and Institution

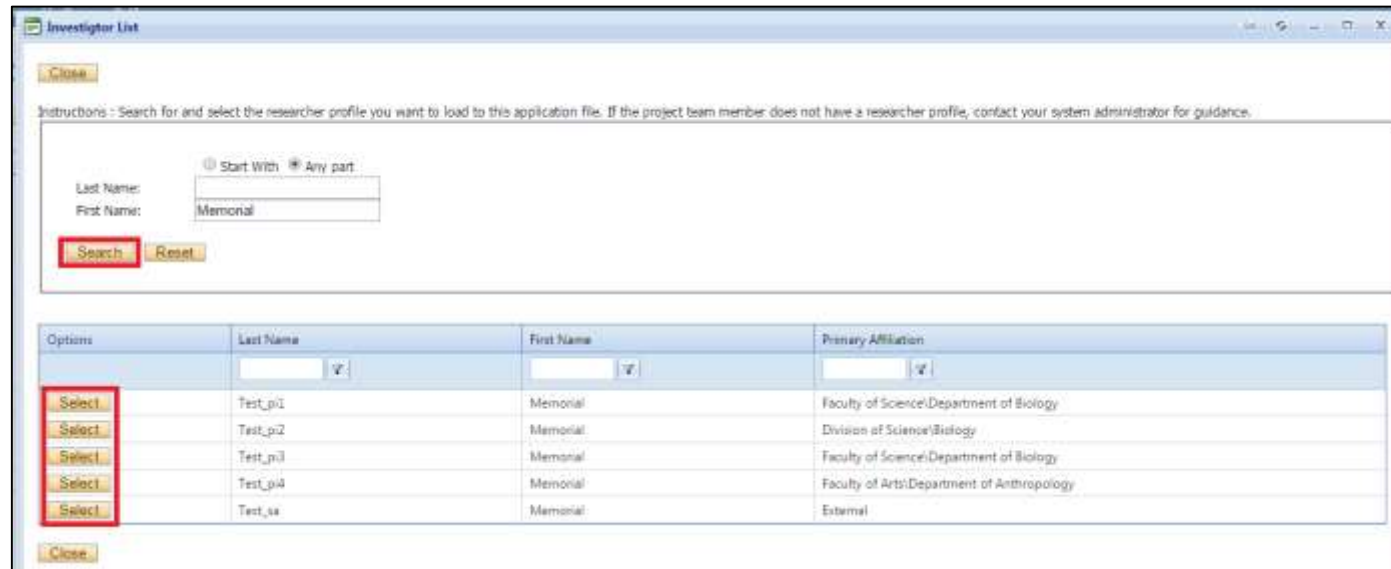
Depending on the research and affiliation, a researcher's rank and institution may change. You may change the rank and institution for the application by selecting the drop down menus on the Project Team Info Tab.



The screenshot shows the 'Principal Investigator' section of an application form. At the top, it displays 'Application Ref No: 2149' and 'Application Form: ICEHR - Application for Ethics Review'. Below this are buttons for 'Save', 'Close', 'Print', 'Export to Word', 'Export to PDF', and 'Submit'. A tabbed interface shows 'Project Team Info' as the active tab. The 'Principal Investigator' section includes instructions: 'Do not hand type data for this section. The Principal Investigator (PI) section default populates with the researcher profile data for the project team member who creates the file. If you are not the PI, click the Change PI button to search for and select an alternate researcher profile. If you load an alternate researcher profile to the PI section, be sure to reload your researcher profile to the Other Project Team Info section below.' The form contains several input fields: 'Prefix' (dropdown menu with 'Dr.' selected), 'Last Name' (text input with 'Doe'), 'First Name' (text input with 'John'), 'Affiliation' (dropdown menu with 'Research Units'), 'Rank' (dropdown menu with 'Associate Professor'), 'Gender' (dropdown menu with 'Unspecified'), and 'Institution' (dropdown menu with 'MUN (STU)'). Red boxes highlight the 'Affiliation', 'Rank', and 'Institution' fields.

Changing the PI of an Application

When you click the **Change PI** button on the Project Team Info Tab a new window will appear. In this window you will search for the Principal Investigator and click **Select**. DO NOT manually enter the PI's information.



The screenshot shows a window titled "Investigator List" with a "Close" button at the top left. Below the title bar, there is a "Close" button and a set of instructions: "Instructions - Search for and select the researcher profile you want to load to this application file. If the project team member does not have a researcher profile, contact your system administrator for guidance." Below the instructions, there are search criteria fields: "Last Name:" and "First Name:" with a dropdown menu set to "Memorial". There are also radio buttons for "Start With" and "Any part". Below these fields are "Search" and "Reset" buttons. At the bottom of the window, there is a table with columns for "Options", "Last Name", "First Name", and "Primary Affiliation". The table contains five rows of data, each with a "Select" button in the "Options" column. The "Select" button for the first row is highlighted with a red box.

Options	Last Name	First Name	Primary Affiliation
Select	Test_p1	Memorial	Faculty of Science/Department of Biology
Select	Test_p2	Memorial	Division of Science/Biology
Select	Test_p3	Memorial	Faculty of Science/Department of Biology
Select	Test_p4	Memorial	Faculty of Arts/Department of Anthropology
Select	Test_sa	Memorial	External

Follow the instructions in the following slides to add yourself as a Project Team Member once you have removed yourself as the PI.

Adding a Project Team Member

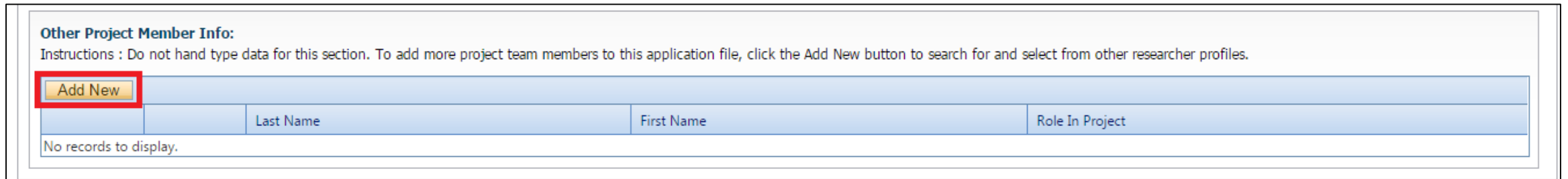
You are required to list all project team members in the Project Team Info tab. You may add two types of project team members to your project:

1. Project team members that will have the ability to sign into the Memorial Researcher Portal to view and edit the application.
2. Project team members that will **not** have the ability to view or edit the application.

Follow the instructions in the subsequent slides to appropriately add project team members. If the Project Team Member will be accessing the application through the Memorial Researcher Portal, please ensure they have an account. If not, they must submit a Memorial Research Portal account request at <https://rpresources.mun.ca/request-romeo-account/>.

Adding a Project Team Member Cont'd

To add project team members whom you **want to have access to the file**, click **Add New** at the bottom of the Project Team Info Tab.

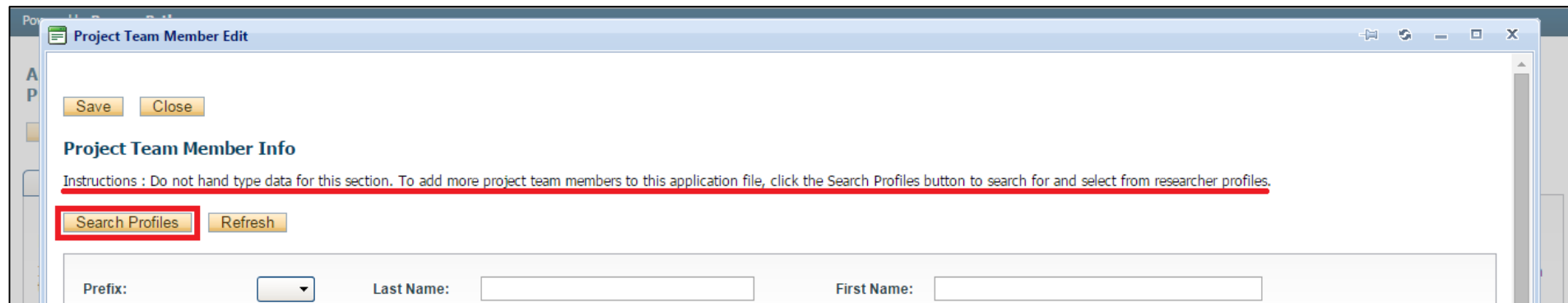


Other Project Member Info:
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

Add New

Last Name	First Name	Role In Project
No records to display.		

A new window will appear. Use the search button to add a member to the project team. **You must use the search button to give a team member access to the application!**



Project Team Member Edit

Save Close

Project Team Member Info
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Profiles button to search for and select from researcher profiles.

Search Profiles Refresh

Prefix: [dropdown] Last Name: [input] First Name: [input]

Adding a Project Team Member Cont'd

The Investigator List Window will open. Use the Last Name text box to type in the Team Members last name and click **Search**.



The screenshot shows a window titled "Investigator List". At the top left is a "Close" button. Below it is a line of instructions: "Instructions : Search for and select the researcher profile you want to load to this application file. If the project team member does not have a researcher profile, contact your system administrator for guidance." Below the instructions are two radio buttons: "Start With" (selected) and "Any part". Underneath are two text input fields: "Last Name:" and "First Name:". The "Last Name:" field is highlighted with a red rectangle. Below the input fields are two buttons: "Search" and "Reset".

When you find the Team Member, click the **Select** button next to their name.

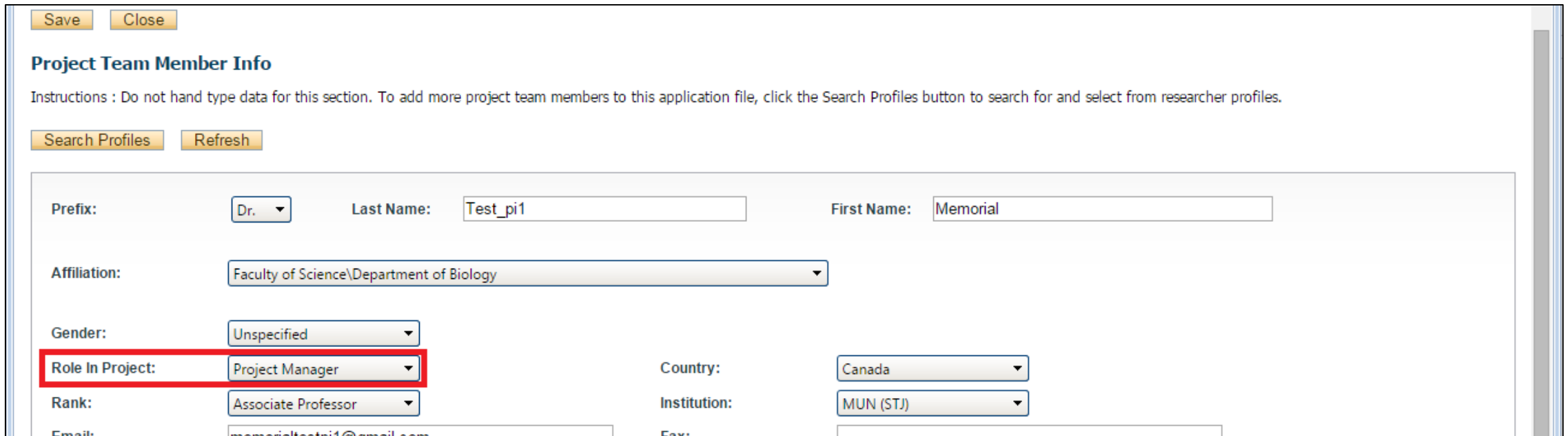


This screenshot shows the same "Investigator List" window after a search. The "Last Name:" field now contains the text "test_pi1". Below the search fields are the "Search" and "Reset" buttons. Below the buttons is a table with search results. The table has four columns: "Options", "Last Name", "First Name", and "Primary Affiliation". The first row of data shows "Test_pi1" in the "Last Name" column, "Memorial" in the "First Name" column, and "Faculty of Science|Department of Biology" in the "Primary Affiliation" column. A red rectangle highlights the "Select" button located to the left of the first row of data.

Options	Last Name	First Name	Primary Affiliation
Select	Test_pi1	Memorial	Faculty of Science Department of Biology

Adding a Project Team Member Cont'd

Once you select the Team Member, their information will appear. Select the Team Members **Role in Project**, then click **Save**.



The screenshot shows a web form titled "Project Team Member Info". At the top left are "Save" and "Close" buttons. Below the title is an instruction: "Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Search Profiles button to search for and select from researcher profiles." Below this are "Search Profiles" and "Refresh" buttons. The form fields are: "Prefix" (Dr.), "Last Name" (Test_pi1), "First Name" (Memorial), "Affiliation" (Faculty of Science\Department of Biology), "Gender" (Unspecified), "Role In Project" (Project Manager, highlighted with a red box), "Rank" (Associate Professor), "Country" (Canada), "Institution" (MUN (STJ)), "Email" (memorialtestpi1@gmail.com), and "Fax" (empty).

Once you have saved, check at the bottom of the Project Team Info Tab to ensure the Team Member has been added.

Adding a Project Team Member Cont'd

If you are adding a project team member, who you do **not** want to have access to the application in the Memorial Researcher Portal, you will type their name and project role in the Principle Investigator Comments box. This box is near the bottom of the Project Team Info tab.



Primary Address:

Alternate Address:

Preferred Address: Primary Address Alternate Address

Country:

Comments:

Other Project Member Info:
Instructions : Do not hand type data for this section. To add more project team members to this application file, click the Add New button to search for and select from other researcher profiles.

Last Name	First Name	Role In Project
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NOTE: If you change the PI for the application later on, you will need to copy and paste any Team Members added this way into the Comments box for the new PI.

Adding a Project Team Member Cont'd

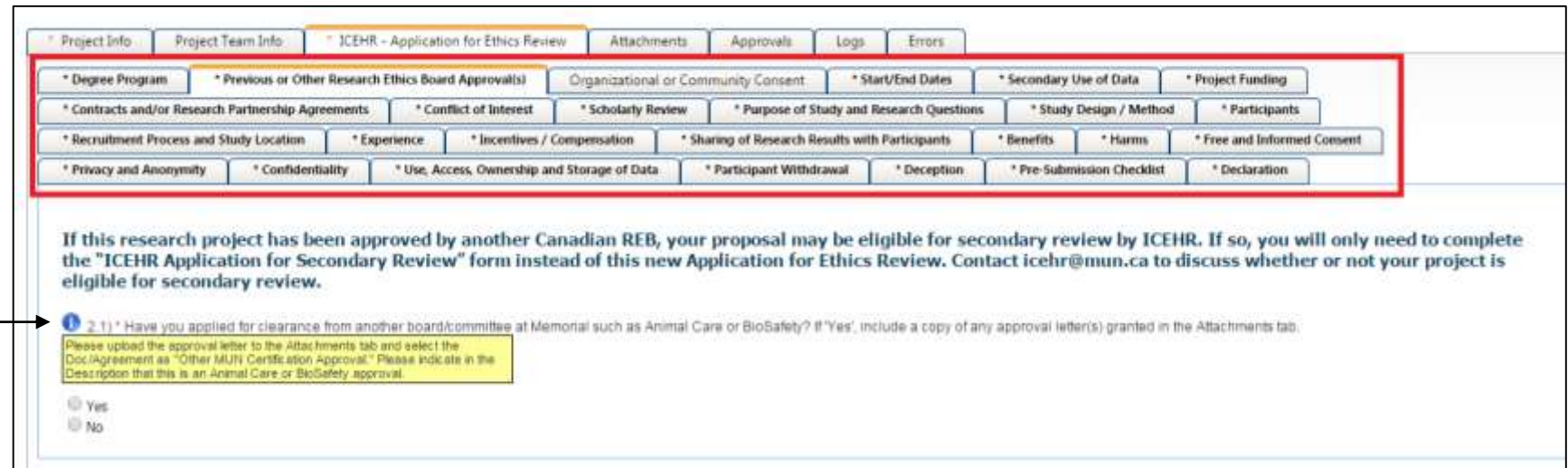
- If one of your team members who will require access to your application does not have a Memorial Researcher Portal account, direct the team member to <https://rpresources.mun.ca>. On the website, they will select and follow the steps in **Request a Memorial Researcher Portal Account** under Memorial Researcher Portal Account.
- If one of your team members has a Memorial Researcher Portal account but does not appear in the database using the search button, **DO NOT manually add the team member**. Please submit a help desk ticket at <https://rpresources.mun.ca/help-2/help/> to seek assistance.
- Make sure to notify team members when you have added them to an application. **There is no system-generated notification for team members.**

Application Custom Question Tab

This tab includes all the questions that are directly related to your particular ethics application. There will often be a number of sub-tabs that organize the application questions into different areas. If you are unsure how to complete a question, click the blue information button. This button may contain additional information or directions about the question.

NOTE: Text responses that contain < > will prompt an unsupported character error and may cause data loss.

When you select a blue information button a yellow block will drop down providing additional information.



* Project Info | Project Team Info | **ICEHR - Application for Ethics Review** | Attachments | Approvals | Logs | Errors

* Degree Program | * Previous or Other Research Ethics Board Approval(s) | Organizational or Community Consent | * Start/End Dates | * Secondary Use of Data | * Project Funding

* Contracts and/or Research Partnership Agreements | * Conflict of Interest | * Scholarly Review | * Purpose of Study and Research Questions | * Study Design / Method | * Participants

* Recruitment Process and Study Location | * Experience | * Incentives / Compensation | * Sharing of Research Results with Participants | * Benefits | * Harms | * Free and Informed Consent

* Privacy and Anonymity | * Confidentiality | * Use, Access, Ownership and Storage of Data | * Participant Withdrawal | * Deception | * Pre-Submission Checklist | * Declaration

If this research project has been approved by another Canadian REB, your proposal may be eligible for secondary review by ICEHR. If so, you will only need to complete the "ICEHR Application for Secondary Review" form instead of this new Application for Ethics Review. Contact icehr@mun.ca to discuss whether or not your project is eligible for secondary review.

2.11 Have you applied for clearance from another board/committee at Memorial such as Animal Care or BioSafety? If 'Yes', include a copy of any approval letter(s) granted in the Attachments tab.

Please upload the approval letter to the Attachments tab and select the Doc/Agreement as "Other MUN Certification Approval." Please indicate in the Description that this is an Animal Care or BioSafety approval.

Yes

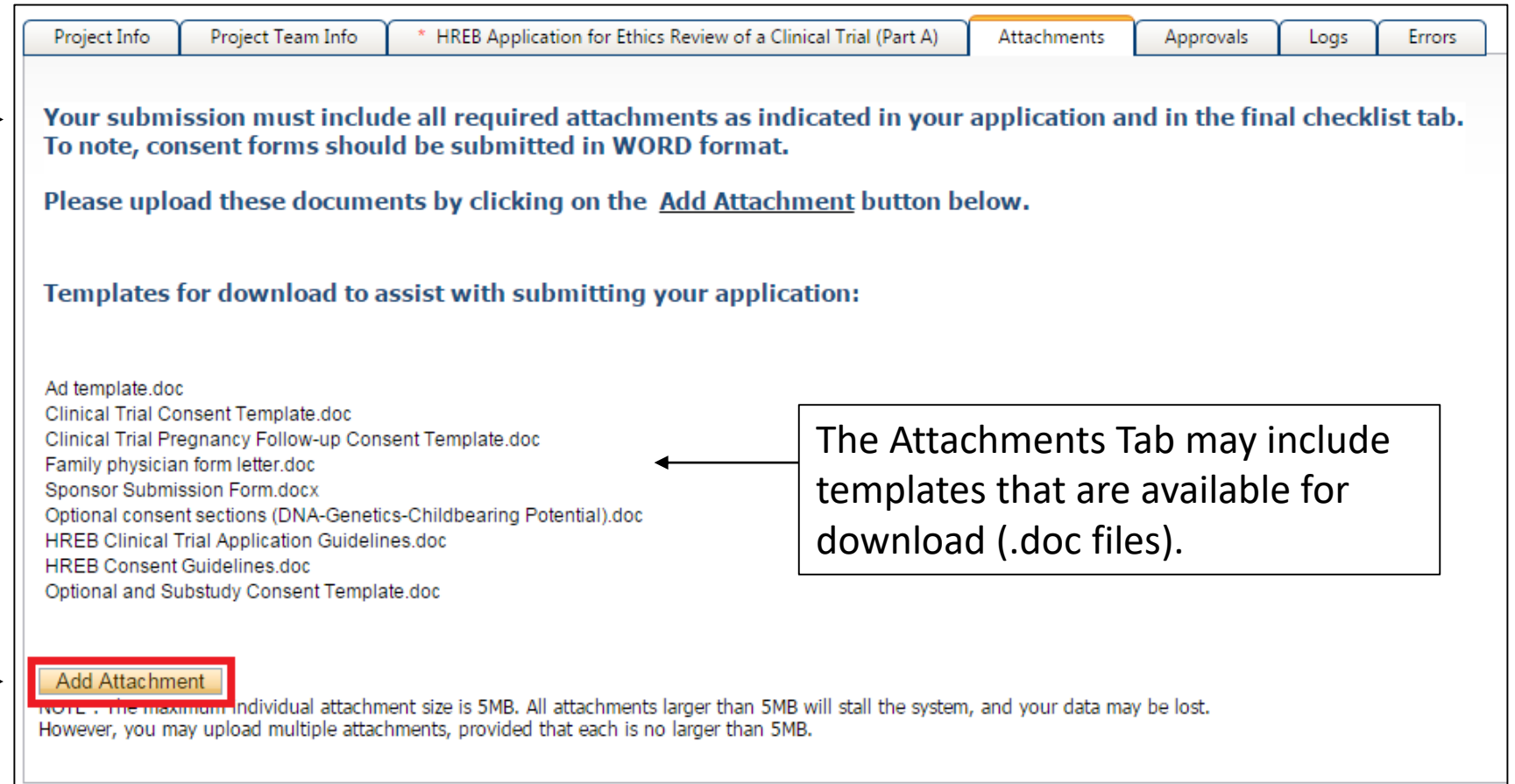
No

Attachments Tab

The Attachments Tab is where users will upload any additional material that is required for the application.

At the top of the tab, there are application-specific instructions on what should be uploaded or where to find information about necessary documents to attach.

To upload an attachment, click the **Add Attachment** button.



Project Info Project Team Info * HREB Application for Ethics Review of a Clinical Trial (Part A) Attachments Approvals Logs Errors

Your submission must include all required attachments as indicated in your application and in the final checklist tab. To note, consent forms should be submitted in WORD format.

Please upload these documents by clicking on the [Add Attachment](#) button below.

Templates for download to assist with submitting your application:

- Ad template.doc
- Clinical Trial Consent Template.doc
- Clinical Trial Pregnancy Follow-up Consent Template.doc
- Family physician form letter.doc
- Sponsor Submission Form.docx
- Optional consent sections (DNA-Genetics-Childbearing Potential).doc
- HREB Clinical Trial Application Guidelines.doc
- HREB Consent Guidelines.doc
- Optional and Substudy Consent Template.doc

Add Attachment

NOTE : The maximum individual attachment size is 5MB. All attachments larger than 5MB will stall the system, and your data may be lost. However, you may upload multiple attachments, provided that each is no larger than 5MB.

The Attachments Tab may include templates that are available for download (.doc files).

File Name Guidelines for Attachments

When uploading an attachment to the Memorial Researcher Portal, the file name **must adhere to the following guidelines:**

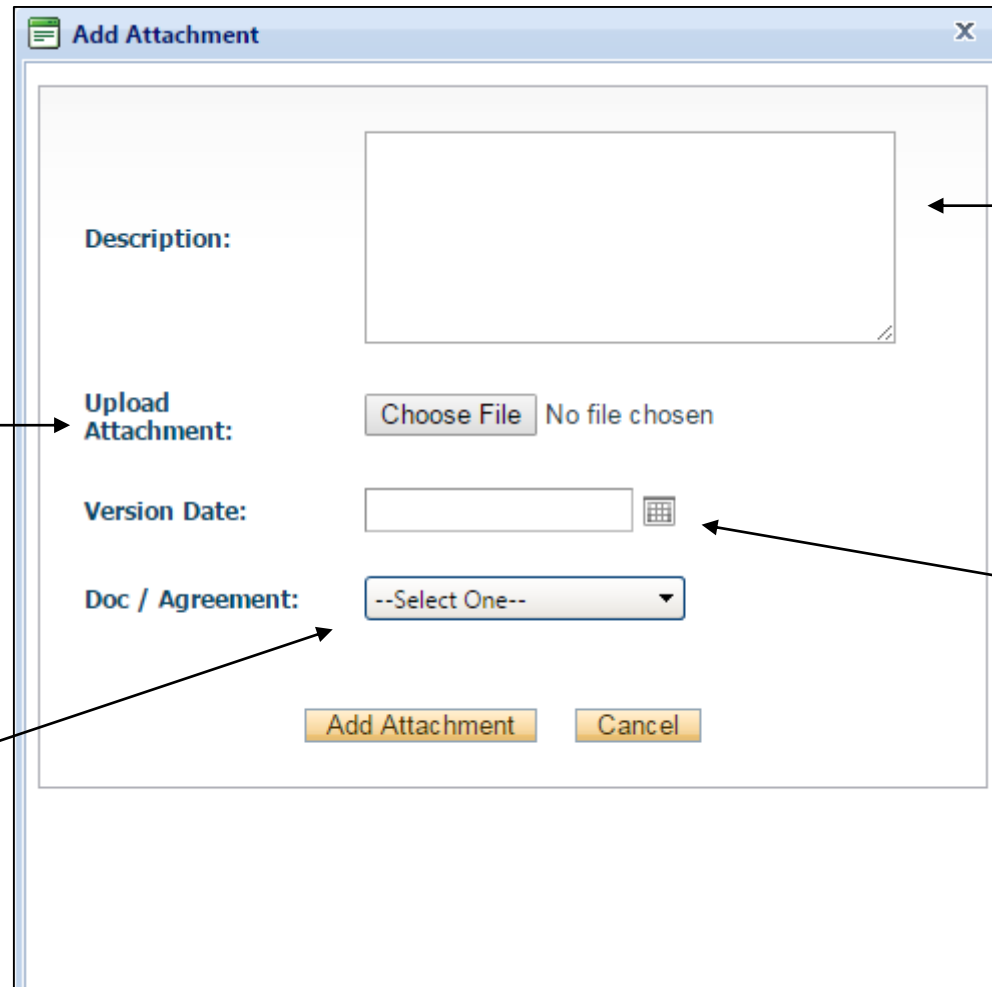
- Ensure your attachment filename does not include these characters: " # % & * : < > ? / { | } ~ [] +
- Filenames must not exceed 128 characters.
- Do not use the period character consecutively in the middle of a file name.
- Do not use the period character at the end of a file name.
- Do not start a file name with the period character.

Please note: The maximum file size is 10 MB. While users can attach as many files as necessary, no single file can exceed 10 MB.

Please reference the FAQ section on the Memorial Research Tools and Resources Website to find suggestions on how to deal with a file that is bigger than 10 MB.

Attachments Tab Cont'd

When you click **Add Attachment**, the Attachment window will appear.



The screenshot shows a window titled "Add Attachment" with the following fields and controls:

- Description:** A large text area for entering a description.
- Upload Attachment:** A button labeled "Choose File" next to the text "No file chosen".
- Version Date:** A date input field with a calendar icon.
- Doc / Agreement:** A dropdown menu with "--Select One--" as the selected option.
- Buttons:** "Add Attachment" and "Cancel" buttons at the bottom.

In order to select a file to upload, click **Choose File**.

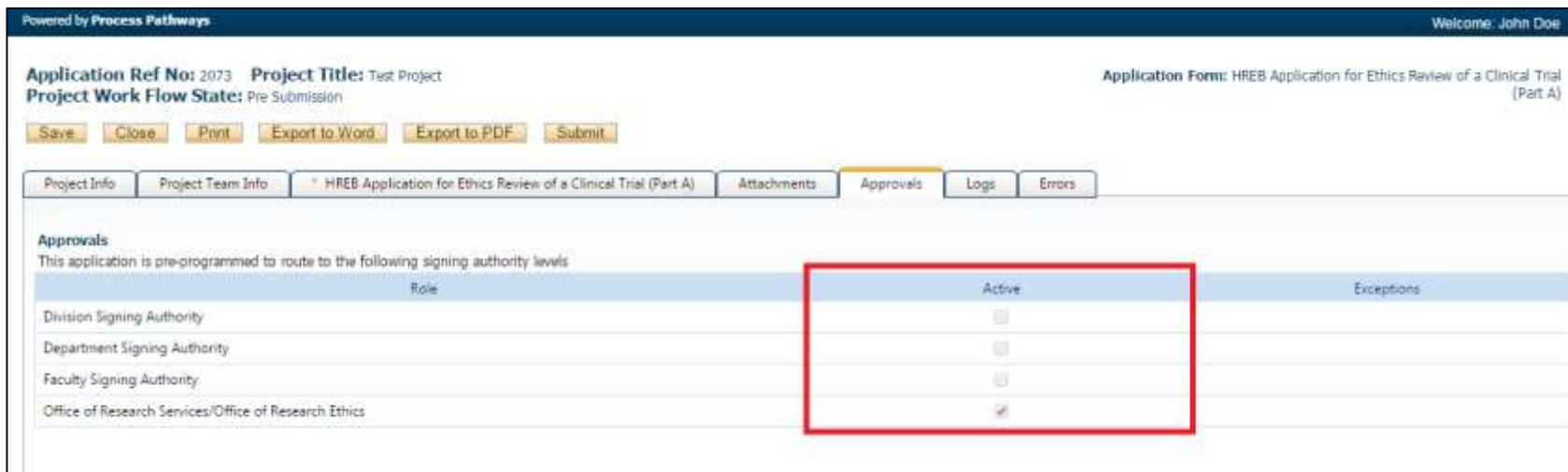
If you wish or have been directed to fill in a description on the attachment, do so here.

Select the type of Doc/Agreement from the provided list. Please use appropriate type indicated by the application.

The date when the document was finalized. If you have multiple versions of the same document prior to submission, it is recommended you delete the outdated attachments.

Approvals Tab

The Approvals Tab demonstrates the path an application will travel once it is submitted (indicated by the checked box next to the particular body). Most certification applications will be directly submitted to the specific ethics office and will not require other signatures. Depending on the application, “Office of Research Ethics” could refer to the ICEHR, Grenfell Ethics, HREB, Animal Care or BioSafety Office. The application will automatically route to the appropriate office.



Powered by Process Pathways Welcome: John Doe

Application Ref No: 2073 Project Title: Test Project Application Form: HREB Application for Ethics Review of a Clinical Trial (Part A)

Project Work Flow State: Pre Submission

Save Close Print Export to Word Export to PDF Submit

Project Info Project Team Info * HREB Application for Ethics Review of a Clinical Trial (Part A) Attachments Approvals Logs Errors

Approvals
This application is pre-programmed to route to the following signing authority levels

Role	Active	Exceptions
Division Signing Authority	<input type="checkbox"/>	
Department Signing Authority	<input type="checkbox"/>	
Faculty Signing Authority	<input type="checkbox"/>	
Office of Research Services/Office of Research Ethics	<input checked="" type="checkbox"/>	

The Log Tab allows the PI and Project Team Members to view all actions on a file. Under the Application Workflow Log, you can track the history of the application. It tracks and time stamps approvals and messages between the PI and the Ethics Office.



The screenshot displays the Memorial Researcher Tools & Resources interface. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". The application reference number is 8540, and the application form is "HREB Application for General Research". There are buttons for Save, Close, Print, Export to Word, Export to PDF, Submit, and Withdraw. The "Logs" tab is selected, and the "Application Workflow Log" radio button is checked. The table below shows columns for Timestamp, Activity Log, Workflow State, Workflow Message, User, and Role/Group. The table is currently empty, displaying "No records to display."

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
No records to display.					

Logs Tab Cont'd

Under the Application Log, all changes made to the application are tracked by the user. It is the responsibility of the PI to review the project log to ensure they are aware of all changes made by Project Team Members prior to submission.

Powered by **Process Pathways** Welcome: Memorial Researcher

Application Ref No: 8540 **Application Form:** HREB Application for General Research

[Save](#) [Close](#) [Print](#) [Export to Word](#) [Export to PDF](#) [Submit](#) [Withdraw](#)

[Project Info](#) [Project Team Info](#) [* HREB Application for General Research](#) [Attachments](#) [Approvals](#) [Logs](#) [Errors](#)

Application Workflow Log **Application Log** Shared Communications

Timestamp	Log Activity	User
2018/08/16 09:28	HREB Application for General Research: Sponsor Information -> Is this project industry sponsored and subject to a review fee? has been changed from "" to ' No (please skip questions 1.2 - 1.10) '	Memorial Researcher
2018/08/16 09:28	Project Title has been changed from "" to ' Sample Application '	Memorial Researcher
2018/08/16 09:26	New File Created	Memorial Researcher

Logs Tab Cont'd

Under Shared Communications, ethics offices can share previously sent emails with the Project Team. Emails here may be viewed or printed.

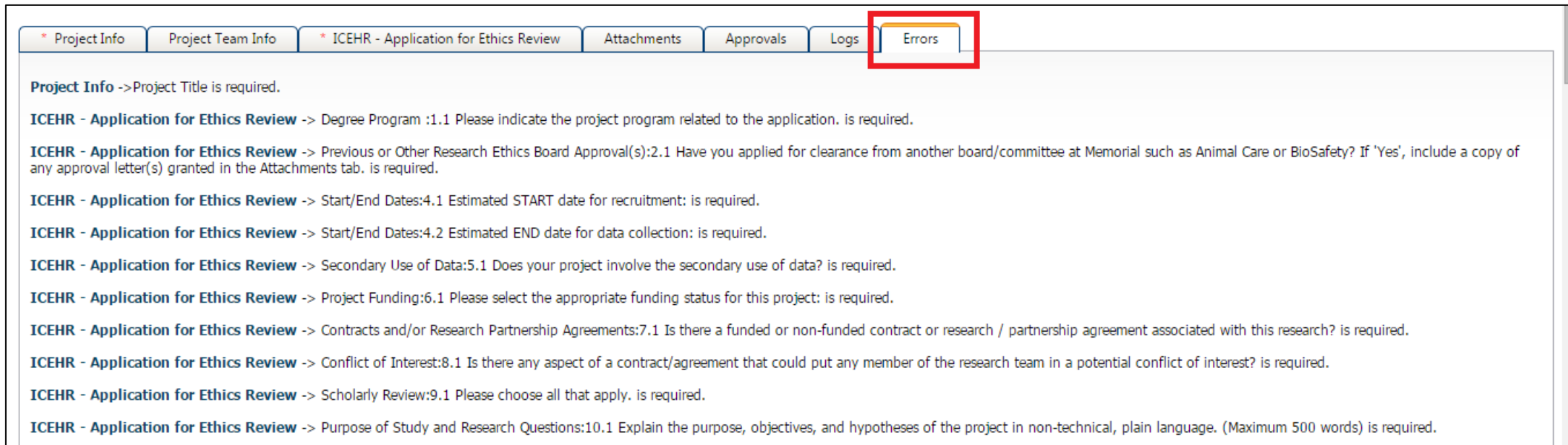
NOTE: Various ethics offices may use this functionality differently. Please contact the particular ethics office if you have questions about how that office uses this functionality.



The screenshot shows a web interface for Memorial Researcher Tools & Resources. At the top, it says "Powered by Process Pathways" and "Welcome: Memorial Researcher". Below this, the "Application Ref No: 8540" is displayed on the left, and "Application Form: HREB Application for General Research" is on the right. A row of buttons includes "Save", "Close", "Print", "Export to Word", "Export to PDF", "Submit", and "Withdraw". Below the buttons is a navigation bar with tabs: "Project Info", "Project Team Info", "HREB Application for General Research" (active), "Attachments", "Approvals", "Logs" (highlighted), and "Errors". Under the "Logs" tab, there are three radio button options: "Application Workflow Log", "Application Log", and "Shared Communications" (selected and highlighted with a red box). Below the radio buttons is a table with columns: "Action", "To", "From", "Subject", and "Date Sent". The table content shows "No records to display."

Errors Tab

The Errors Tab lists any required questions that have not been answered. When all required questions are answered the Errors Tab will disappear. You cannot submit an application if the Errors Tab appears on your application.



* Project Info Project Team Info * ICEHR - Application for Ethics Review Attachments Approvals Logs **Errors**

Project Info ->Project Title is required.

ICEHR - Application for Ethics Review -> Degree Program :1.1 Please indicate the project program related to the application. is required.

ICEHR - Application for Ethics Review -> Previous or Other Research Ethics Board Approval(s):2.1 Have you applied for clearance from another board/committee at Memorial such as Animal Care or BioSafety? If 'Yes', include a copy of any approval letter(s) granted in the Attachments tab. is required.

ICEHR - Application for Ethics Review -> Start/End Dates:4.1 Estimated START date for recruitment: is required.

ICEHR - Application for Ethics Review -> Start/End Dates:4.2 Estimated END date for data collection: is required.

ICEHR - Application for Ethics Review -> Secondary Use of Data:5.1 Does your project involve the secondary use of data? is required.

ICEHR - Application for Ethics Review -> Project Funding:6.1 Please select the appropriate funding status for this project: is required.

ICEHR - Application for Ethics Review -> Contracts and/or Research Partnership Agreements:7.1 Is there a funded or non-funded contract or research / partnership agreement associated with this research? is required.

ICEHR - Application for Ethics Review -> Conflict of Interest:8.1 Is there any aspect of a contract/agreement that could put any member of the research team in a potential conflict of interest? is required.

ICEHR - Application for Ethics Review -> Scholarly Review:9.1 Please choose all that apply. is required.

ICEHR - Application for Ethics Review -> Purpose of Study and Research Questions:10.1 Explain the purpose, objectives, and hypotheses of the project in non-technical, plain language. (Maximum 500 words) is required.

Editing a Saved Application

Once you have started and saved an application, it will appear in the **Applications: Drafts** under the appropriate role block. When you enter the quick link you will see a page of all applications that are created but not submitted. There are various options to select for an application as shown below.



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Memorial
Researcher Portal

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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>
View Edit Clone Delete Latest Workflow	Ref No : 8540	Sample Application	Dr. Memorial Researcher (Faculty of Science\Department of Biology)	HREB Application for General Research (Certification\Human Ethics)	Project Status: Pending Workflow Status: Pre-Submission Last Saved: 2018/08/16

Application Options

The options for an application include:

Edit: To enter the application with the ability to edit the content.

View: To view the application without the ability to edit and save content.

Clone: By selecting this button you can clone your application. This will allow you to start a new application with the same information from a previous application. This button should not be used when a request for revisions has been made by an Ethics board. All edits for revisions should be made to the submitted application.

Delete: To delete the application from the Researcher Portal.

Latest Workflow: To open the application directly at the Logs Tab to view the Workflow Log.

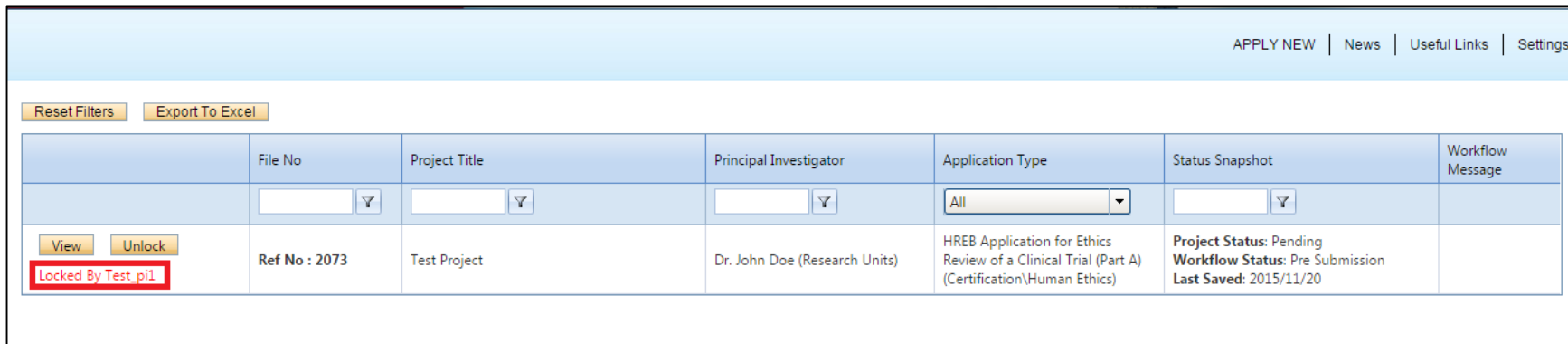


Locked File

A file may appear as “locked” if another team member is working on it or if a team member has not closed the file properly after working on it.

If it appears that you have been locked out of a file by a Project Team Member, you should directly contact that team member prior to clicking **Unlock**. *If you unlock the file while a team member is working on it, all changes made by that team member will be deleted.* If the team member is not working in the file, the PI can click **Unlock**. You may also contact the Researcher Portal help desk for assistance.

If you are the researcher who has locked a file, you can unlock it by re-opening the file to edit it and clicking Close to properly close the file. ***It is important to Save and Close a file in the Researcher Portal when you have completed your work to avoid locking other team members out of the file.***



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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot	Workflow Message
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>	
<input type="button" value="View"/> <input type="button" value="Unlock"/>	Ref No : 2073	Test Project	Dr. John Doe (Research Units)	HREB Application for Ethics Review of a Clinical Trial (Part A) (Certification\Human Ethics)	Project Status: Pending Workflow Status: Pre Submission Last Saved: 2015/11/20	

Locked By Test_pi1

Withdrawing an Application

If the application under Applications: Drafts or Applications: Requiring Attention, you may withdraw the application from consideration.

To withdraw an application:

- Click on the applicable link (Applications: Drafts or Applications: Requiring Attention)
- Edit the specific application
- Click Withdraw

You will need to add a comment in the Work Flow Action window to process the withdrawal request.

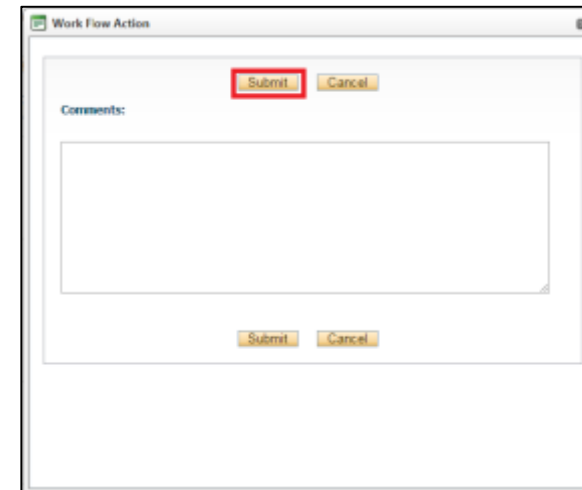
Once you withdraw an application, you can locate it under Applications: Withdrawn on the Researcher Portal homepage.

Submitting an Application

When you have completed the application and are prepared to submit it, click **Save** in the Application Action Buttons at the top of the page. Once you have clicked save, click the **Submit** button.



A workflow action block will appear. Here, you may make any necessary comments to the Ethics Office about your application. Click **Submit**.



Please note you cannot submit the application without entering a comment in the workflow action block.

Reviewing a Submitted Application

When an application is under review, it will appear under the role block quick link called “Applications: Under Review.” Click on the quick link to view the status of your application. The column, **Status Snapshot** will show your project status and where your application is in the workflow.



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Memorial Researcher Portal

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	File No	Project Title	Principal Investigator	Application Type	Status Snapshot
View Clone Latest Workflow	20190431	Sample Application	Dr. Memorial Researcher (Faculty of Science\Department of Biology)	Human Ethics	Project Status: Pending Workflow Status: ORS Review

Applications Requiring Revisions

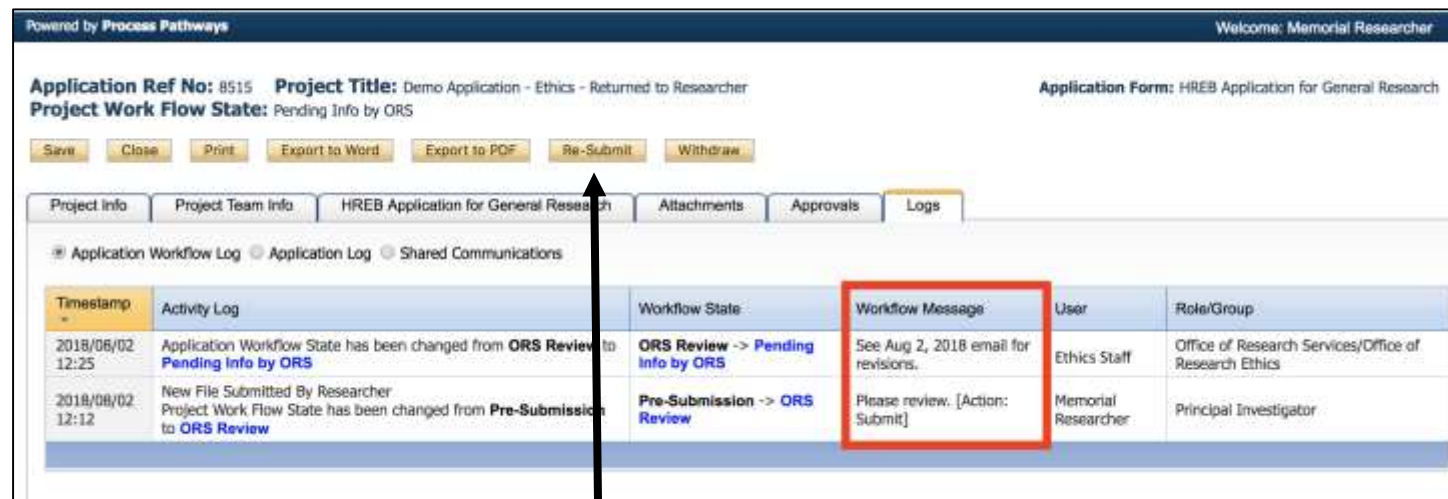
When an application has been returned for revisions, the role block quick link “Applications: Requiring Attention” will be boldfaced and red. Click the quick link and then select **Edit** to enter the application.



Applications Requiring Revisions Cont'd

To see the workflow message from the Ethics Office, go to the Logs Tab. The Workflow message in the table will provide information regarding the necessary changes. Once you have made the necessary edits, click **Re-Submit** in the Application Action Buttons at the top of the application. In the the pop-up Work Flow Action window, enter a comment and click **Submit**.

If you wish to withdraw this application from further consideration, click **Withdraw**. This withdraws the application and moves it to Applications: Withdrawn.



The screenshot shows the Memorial Researcher application interface. At the top, it displays "Application Ref No: 8515" and "Project Title: Demo Application - Ethics - Returned to Researcher". Below this, there are action buttons: Save, Close, Print, Export to Word, Export to PDF, Re-Submit, and Withdraw. The "Logs" tab is selected, showing a table of application workflow logs. A red box highlights a workflow message from the Ethics Staff, and a black arrow points from this message to the "Re-Submit" button.

Timestamp	Activity Log	Workflow State	Workflow Message	User	Role/Group
2018/06/02 12:25	Application Workflow State has been changed from ORS Review to Pending Info by ORS	ORS Review -> Pending Info by ORS	See Aug 2, 2018 email for revisions.	Ethics Staff	Office of Research Services/Office of Research Ethics
2018/08/02 12:12	New File Submitted By Researcher Project Work Flow State has been changed from Pre-Submission to ORS Review	Pre-Submission -> ORS Review	Please review. [Action: Submit]	Memorial Researcher	Principal Investigator

Resubmit after you have made all necessary edits to your application.

Contact Us!



If you have any issues or questions about the Memorial Researcher Portal please submit a Help Desk Ticket at <https://rpresources.mun.ca/help-2/help/>

*Special thanks to Queen's University for providing support and material for this training manual.