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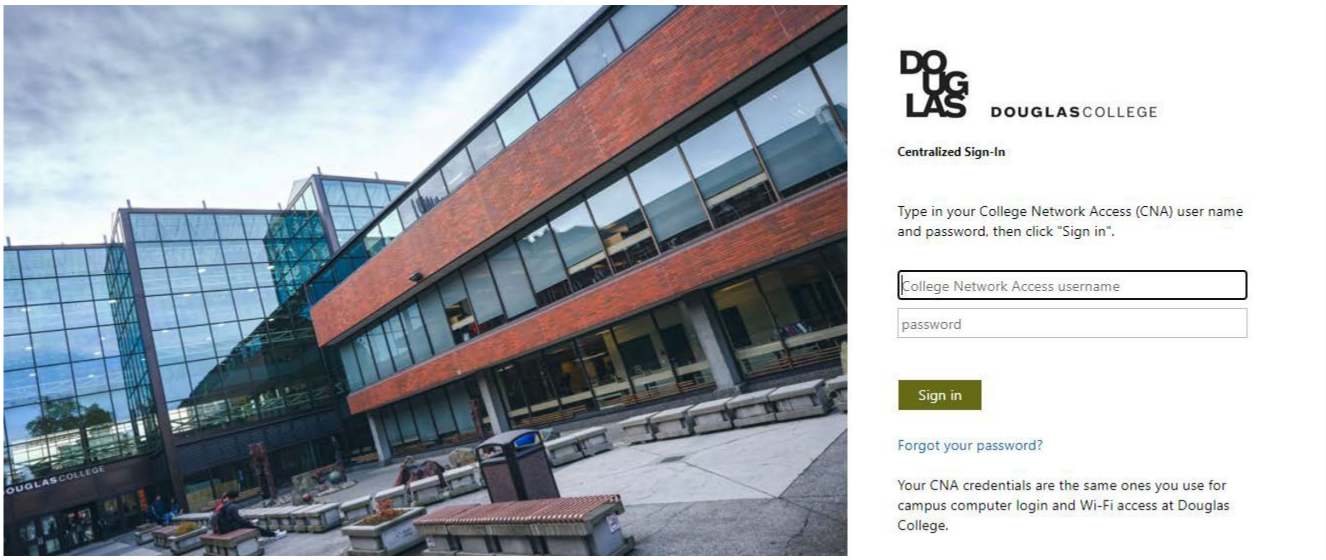
Accessing Your Account

If you do not yet have a Cayuse Human Ethics account, please contact reb@douglascollege.ca to request one. Once you have received a confirmation email that your account has been created, you can access your account by following this link: **https://douglas.prod-ca.cayuse.com** and signing in with your Douglas College credentials.

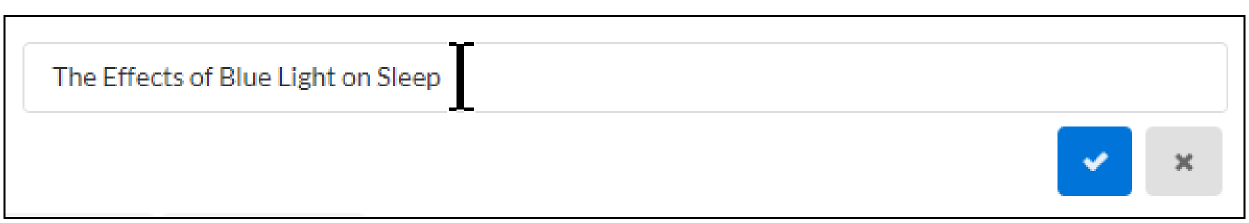


Creating a Study

A **Study** is a container for all of your submissions, actions, and changes on a particular research activity. You must create a study before creating your initial submission.

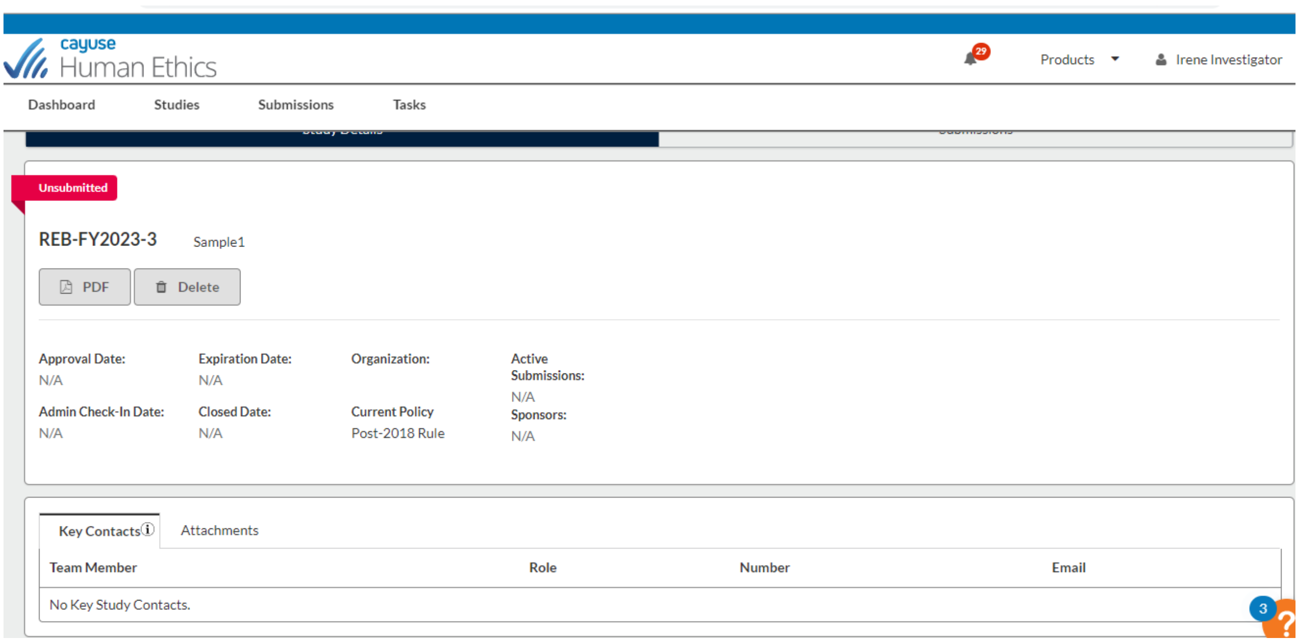
1. Click 

in the upper right-hand corner of your Dashboard or the Studies page.
2. Enter the title of your study. The title can be up to 600 characters long.



1. Click  to save your study.

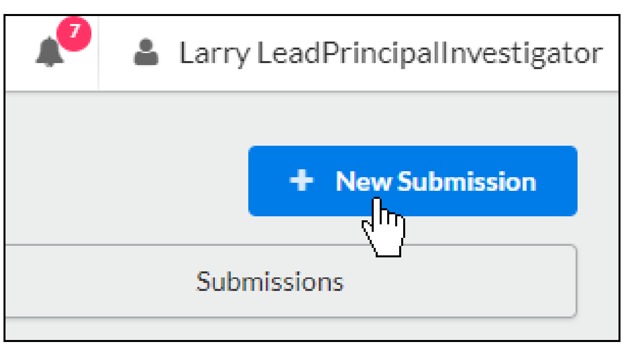
After creating your study, you will be taken to the Study Details page. Here, you will see where important study information will populate once you begin your submission.



The person who creates the study is added as the primary contact by default. You can change this when editing the submission.

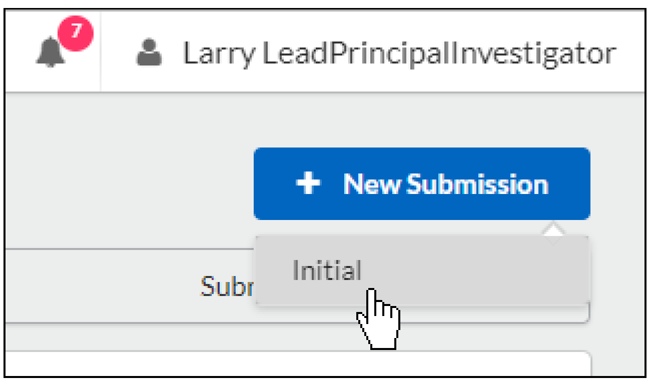
You can rename your study up until the completion of a withdrawal or admin closure submission. From the Study Details screen, hover over the study title and click within the field to edit.

Once you create your study, you can [begin your initial submission](). Click on **New Submission** in the upper right-hand corner to start completing your forms.



Creating an Initial Submission

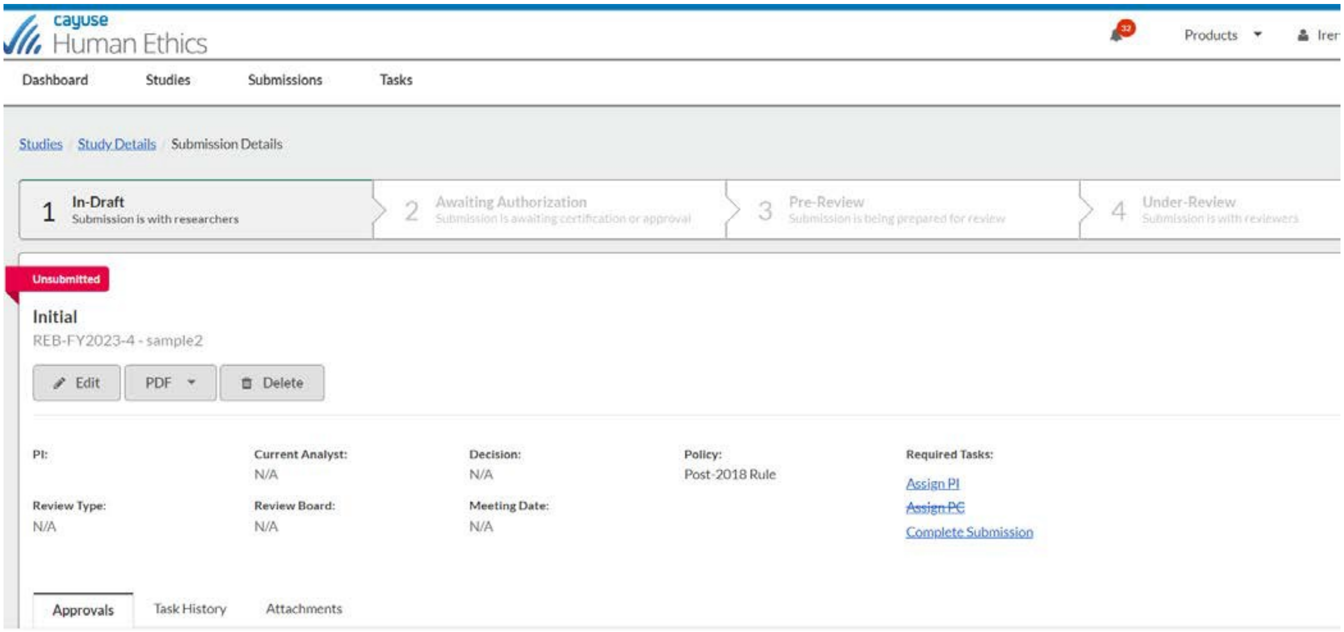
After you create a new study, you can begin completing forms for your initial submission by clicking on **New Submission**, and then clicking **Initial** from the drop-down menu.



Submission information will populate beneath the Submission Details tab. The person who creates the study is added as the Primary Contact by default, but this can be changed when editing the submission. **Make sure to not remove yourself from all roles and Save, or you will not be able to access your submission once you leave.**

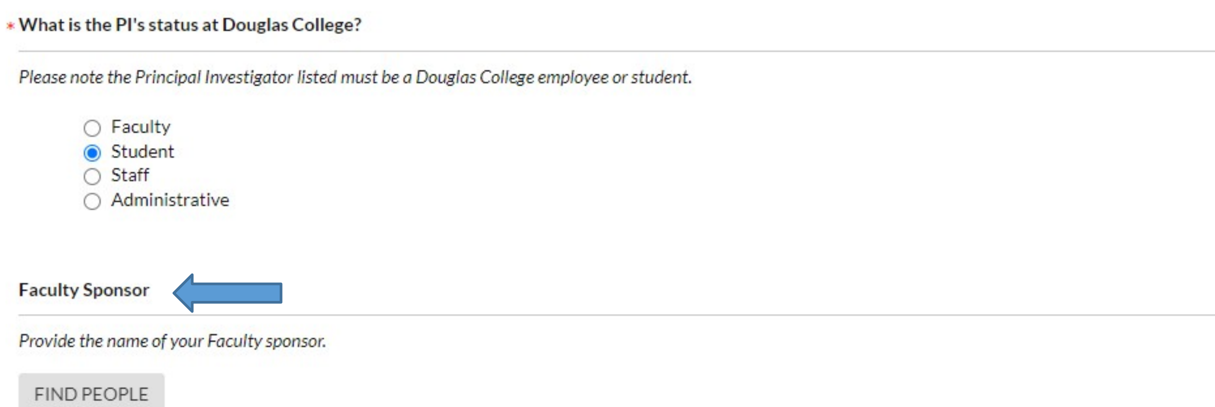
Click on to begin your submission forms. You will always be able to return to your incomplete submission by clicking this button.

Once on your institution's initial submission form, you can return to the Submission Details page by clicking on **Study** in the upper left-hand corner of the screen.

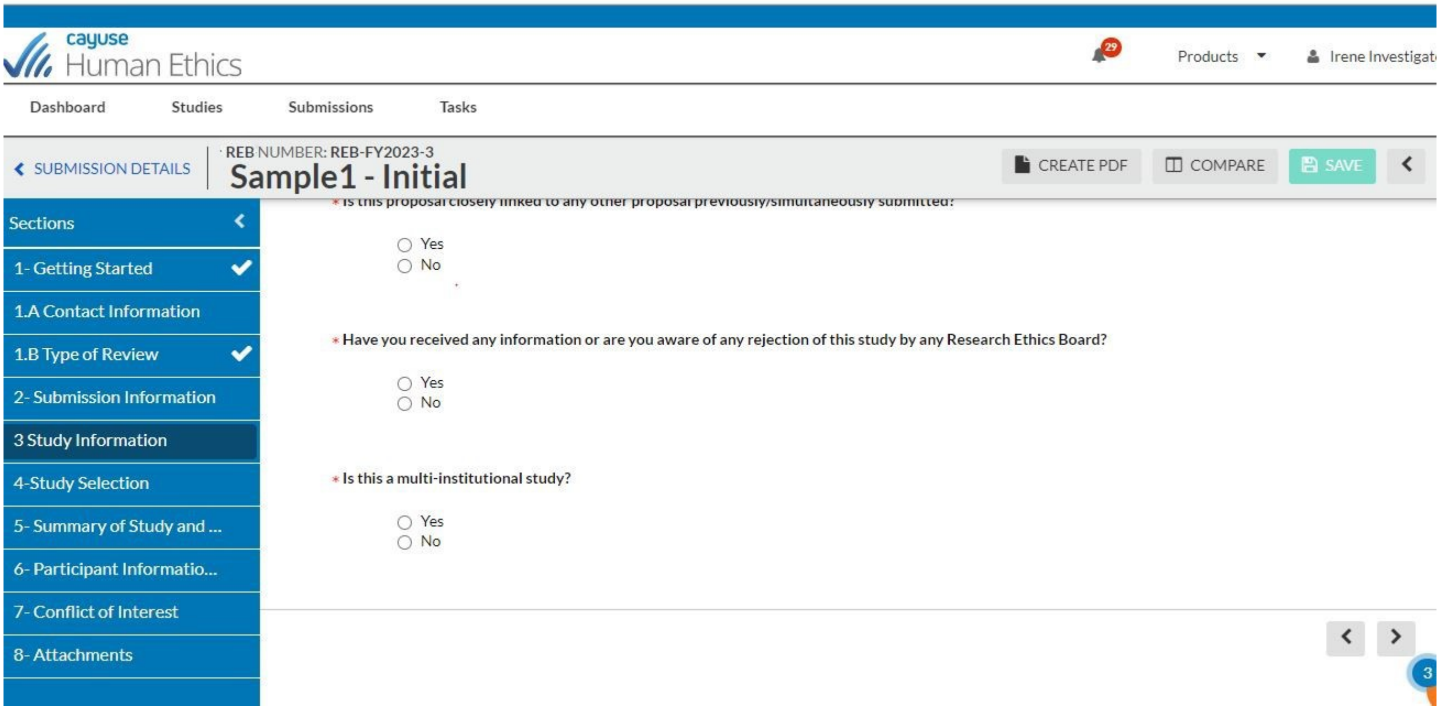


PIs who are Students

If the Principal Investigator (PI) is a student they must use the people finder to select their Faculty Sponsor.



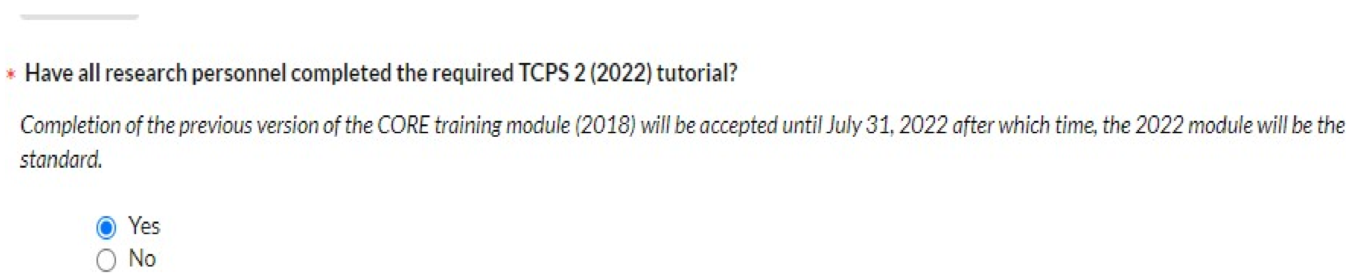
Use the  buttons to toggle between sections. You can also click on a section name in the menu at left to jump to that section.



Completing Submission Forms

There are several types of questions that your institution may have chosen to include on the submission forms:

- **Radio Buttons:** Select one of the available options.



- **Check Boxes:** Select one or more of the available options.

* **Study Site**

Please select the location of the study. (please select all that apply)

- [ ] Douglas College New Westminster Campus
- [ ] Douglas College Coquitlam Campus
- [ ] Douglas College Anvil Centre
- [ ] Douglas College Affiliated Sites
- [ ] External (non Douglas College sites)

- **Date Picker:** Click within the field to browse for a date.

Start Date

- **Text Box:** Provide a short answer to the stated question (200-character limit). If you need to enter multiple lines of text, the box will expand to fit.

* **Total Study Enrollment**

Please enter the total number of participants to be enrolled at all study sites.

- **Text Area:** Provide a detailed answer to the stated question. You can use formatting such as bold, italics, underline, strikethrough, bulleted lists, numbered lists, and hyperlinks.

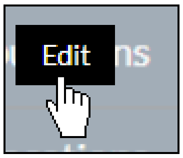
5- Summary of Study and Recruitment

* **Study Background**

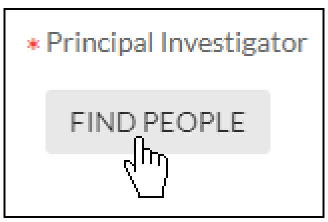
Provide the background and rationale for the study.

B I U

You can also add PNG or JPG images using the image button. Once your image is inserted, you can edit the image by clicking on the image and then clicking **Edit**.



- **Person and Sponsor Finders:** While every initial submission will require you to add a Primary Contact and Principal Investigator, your institution may have you add other people or sponsors to different sections within your submission. Click on the finder button to bring up a search dialogue.



Search for the individual or sponsor that you wish to add, select them, and click **Save**.

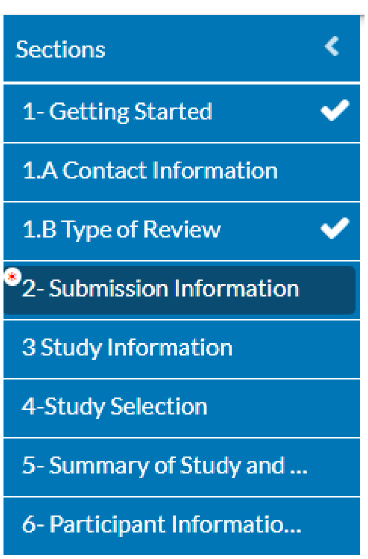
Attachments: Upload one or more files to the study by clicking ATTACH . Human Ethics supports the following file types:

File Type	Extension
Text	txt
Adobe	pdf
Raster image formats	png, bmp, gif, tif, tiff, jpg, jpeg, jp2, jpx
Vector image formats	wmf, emf, svg
Microsoft Word	doc, docx, docm
Microsoft Excel	xls, xlsx, xlsm
Microsoft PowerPoint	ppt, pps, pptx, pptm, ppsx, ppsm, sldx, sldm

- You can also include hyperlinks as "attachments" by choosing **Add Link** from the **+** drop-down menu.

To delete an attachment, click the ✖ icon next to the attachment.

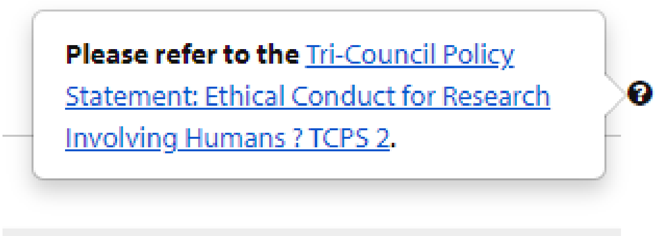
Please note: Some questions have * next to the question number. This indicates a required question. Sections with unsaved changes have an asterisk next to the section name.



To save your changes, click SAVE in the upper right-hand corner.

Help with Questions

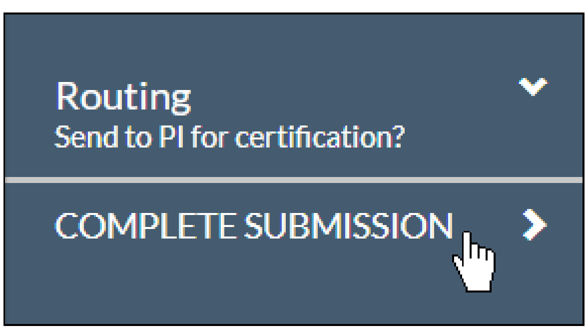
If there is help text for a question, you can click on the button to view the additional information for that question.



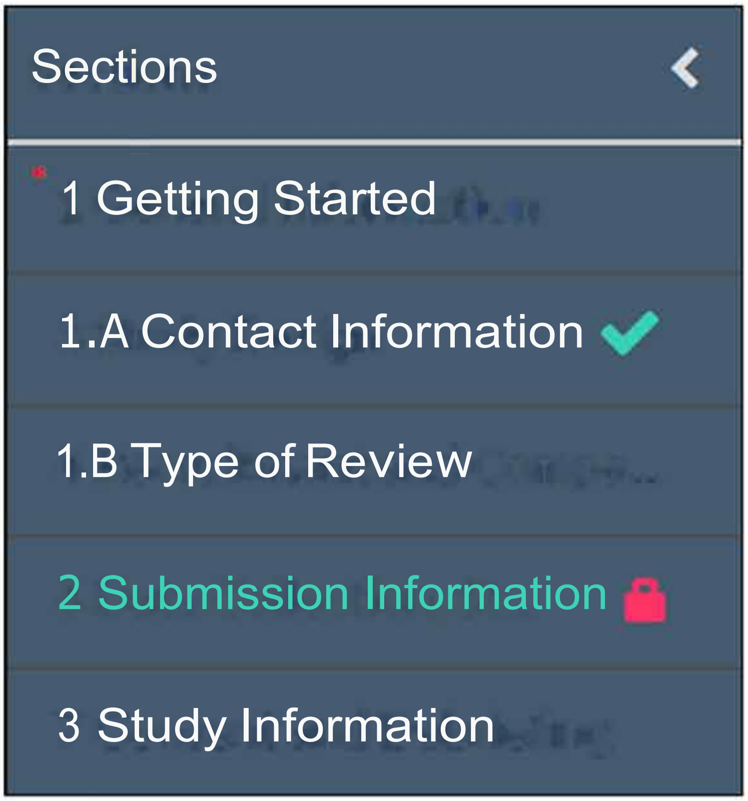
Once there are check marks next to all of your sections, you have completed the submission forms and are ready for routing.

Please note: If one of your sections doesn't have a check mark and you aren't sure why, search the section for any required questions you may have missed.

With every section completed, you can complete your submission and send it to the PI for certification.



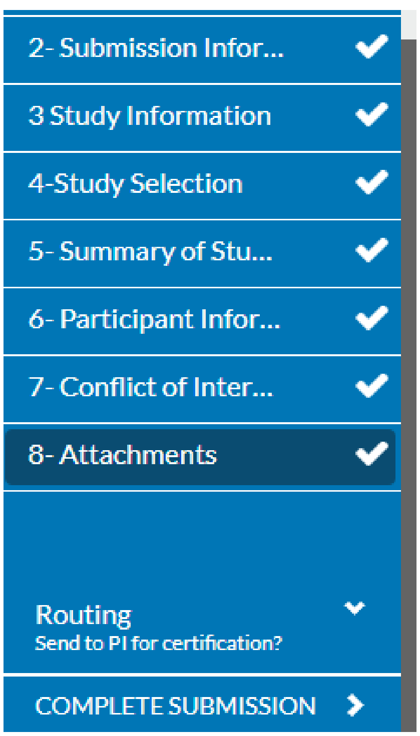
Please note: Human Ethics will warn you with a red lock icon if another user is currently editing a section. You won't be able to edit that section until they're done with their edits.



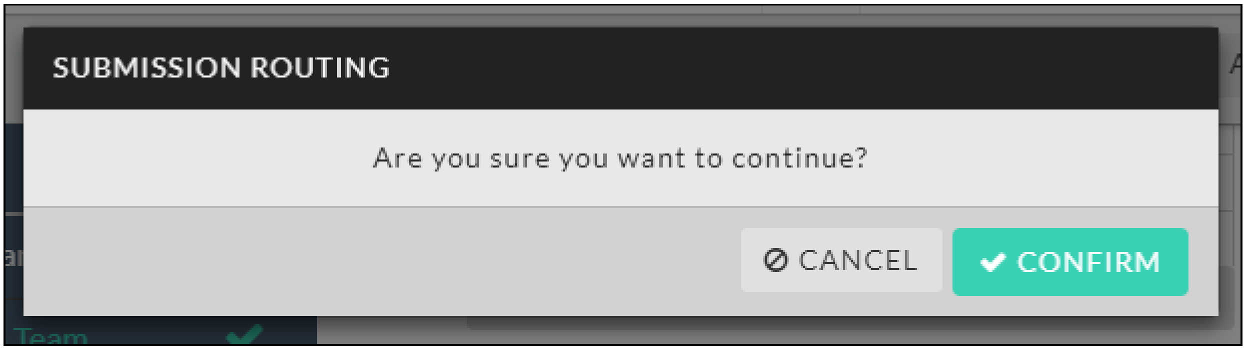
Completing a Submission

The **Complete Submission** button will only appear when you have check marks next to all of your sections,. If one of your sections doesn't have a check mark and you aren't sure why, click on the section to search for any required questions you may have missed.

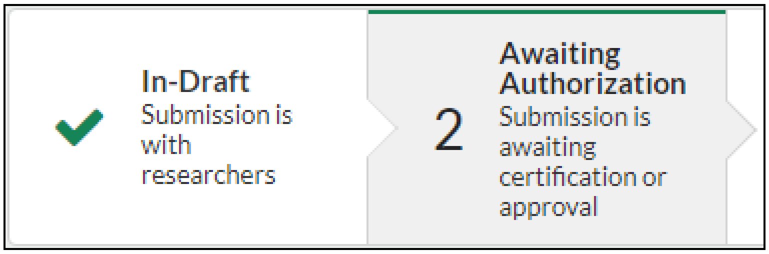
Once you have filled out every section of your submission and have added all required attachments, a **Complete Submission** option appears beneath **Routing** within the menu.



After clicking Complete Submission, you will be prompted to **Confirm** or **Cancel**.



Upon confirmation, you will see the status of your submission change on the Submission Details page.



Certification

Your completed submission is sent to the PI for certification. The PI will receive an email letting them know that the submission needs to be certified. When the PI certifies the submission, they are asserting the submission is complete and accurate and are accepting their PI responsibilities.

If the PI decides that changes need to be made, they will send the submission back. All research team members will receive an email notifying them of the change in status so they can make the necessary edits and complete the submission once more.

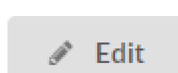
Once the PI has certified the submission, the submission will be routed to the Analyst. The submission may be returned at any point for edits or clarification. **Please note:** If your institution does not have an approver, the submission may be routed directly to the Analyst.

Completing Submission as a PI: If you are a PI completing your submission, you should be able to then certify the submission right away.

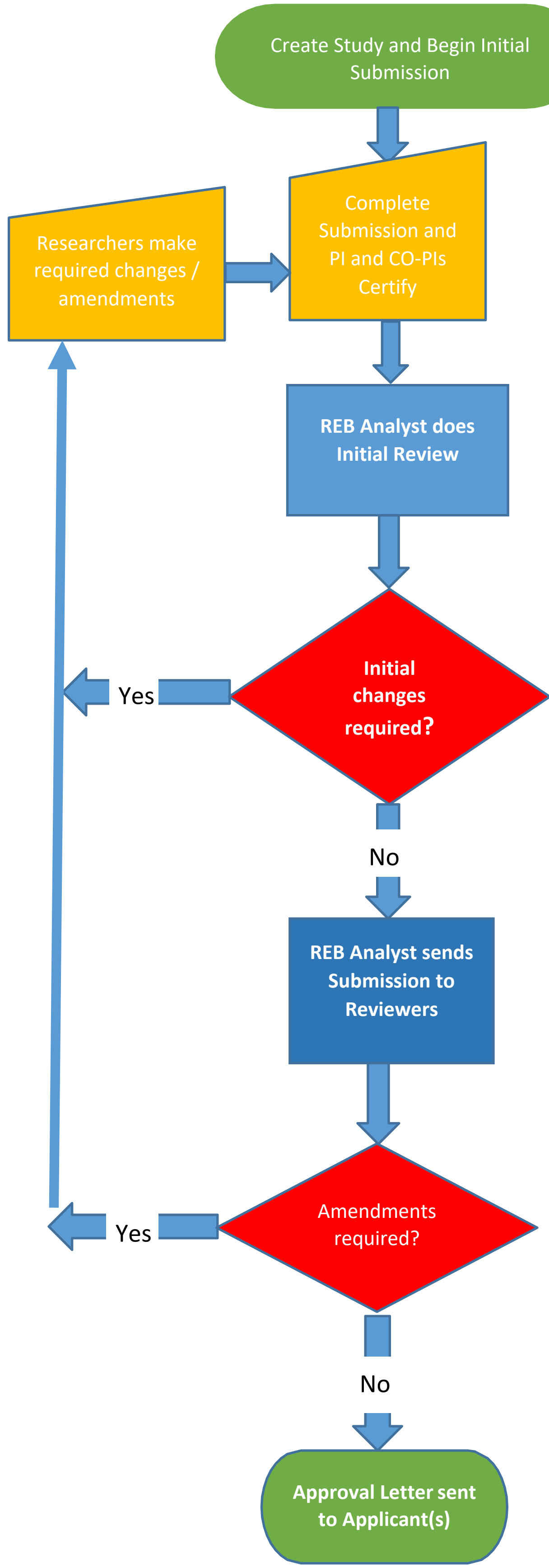
Co-PIs: Your institution's settings may require that any Co-PIs on the study also certify the submission. These individuals also have the ability to return to the submission to the research team. Administrators can specify this behavior in the Application Settings.

Recertification: If the submission does get returned to the research team, all previous certifications are cleared. All individuals who were required to certify the submission in previous rounds of routing must recertify every time the submission is returned before it can move forward.

Reopening Your Submission



To reopen the submission and make edits, click on the button within Submission Details.


Create Study and Begin Initial Submission
Researchers make required changes / amendments
Complete Submission and PI and CO-PIs Certify
REB Analyst does Initial Review
Yes
Initial changes required?
No
REB Analyst sends Submission to Reviewers
Yes
Amendments required?
No
Approval Letter sent to Applicant(s)

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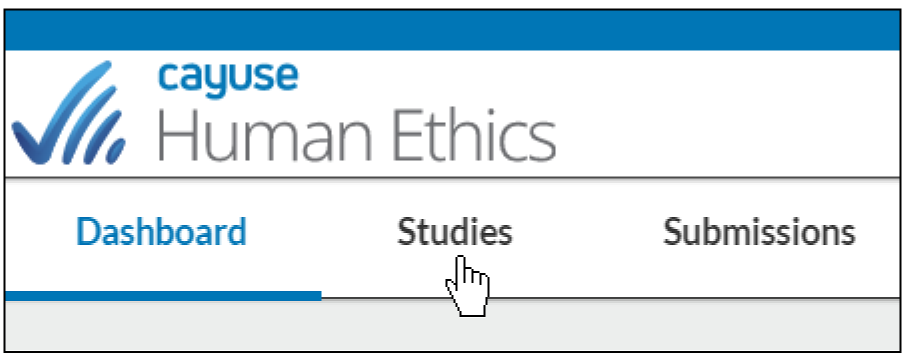
Creating an Amendment Submission

Please note, the Cayuse platform refers to amendments as modifications.

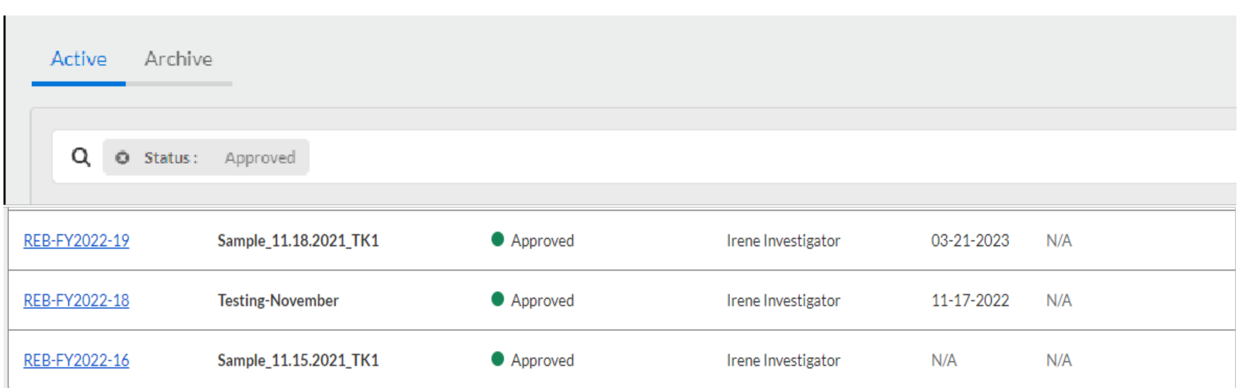
If you have an approved study, but need to create a Modification Submission, you can do so from the Study Details page.

Creating a Modification

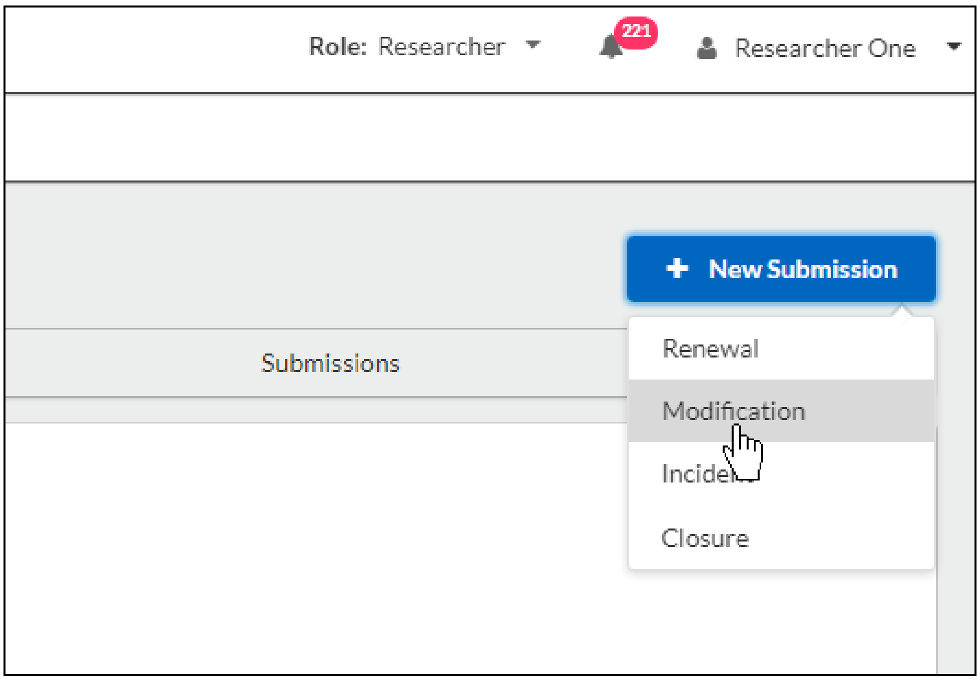
1. From your Researcher Dashboard, click on **Studies**.



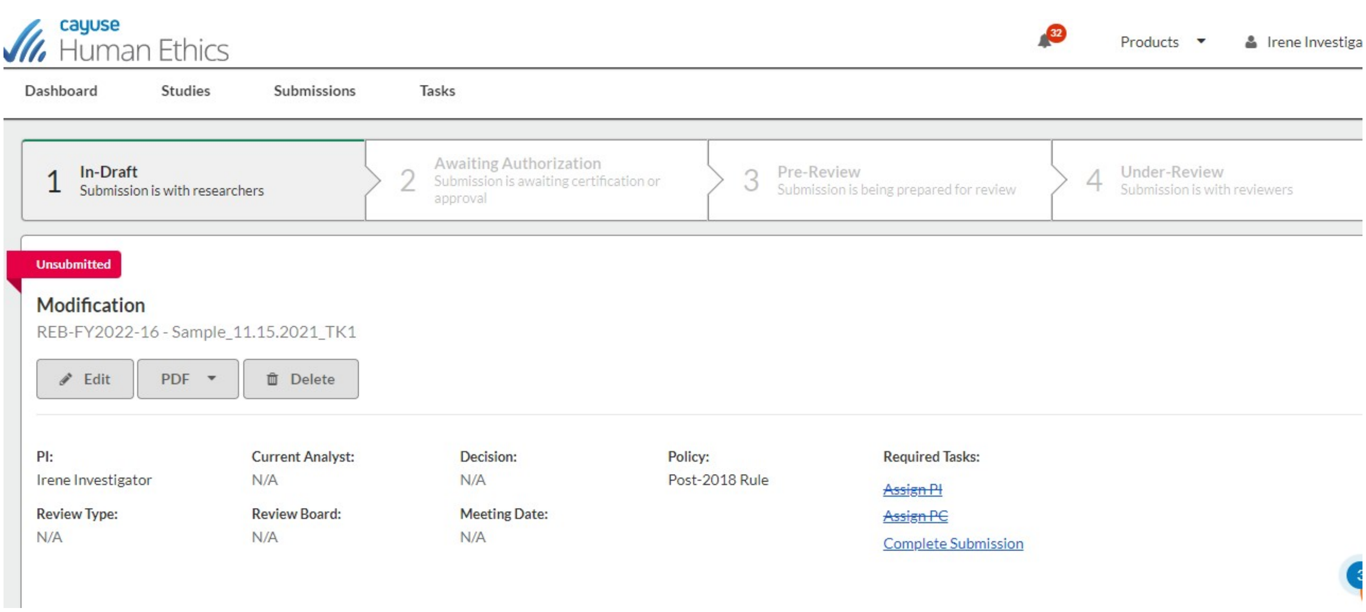
2. Search for the study for which you wish to create an amendment, and click on the study number. **Please note:** Study must be approved.



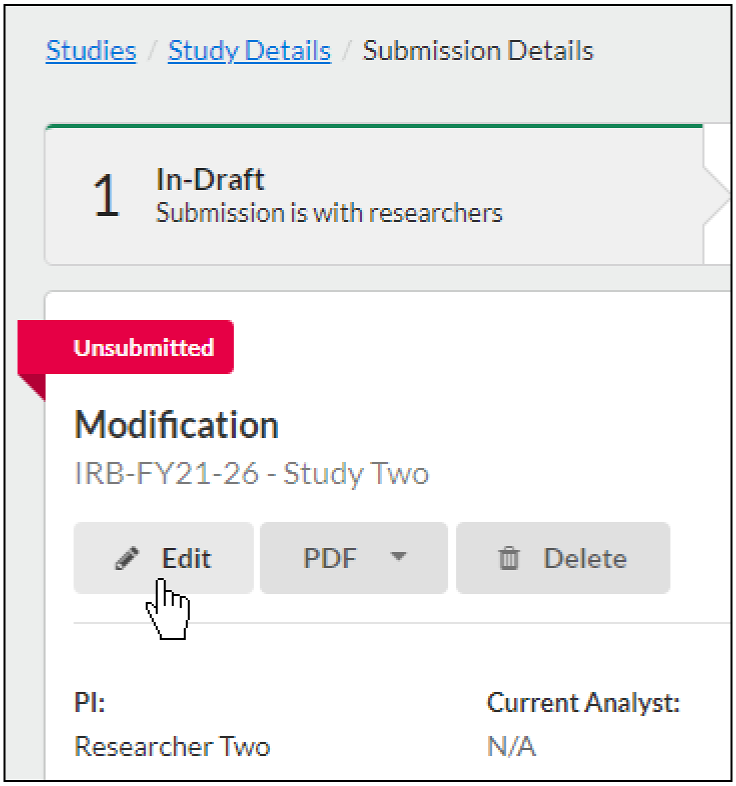
3. In the top right-hand corner of the Study Details page, click on the **New Submission** drop- down menu, and click **Modification**.



Submission information will populate beneath the Submission Details tab. The person who creates the study is added as the Primary Contact by default, but this can be changed when editing the submission.



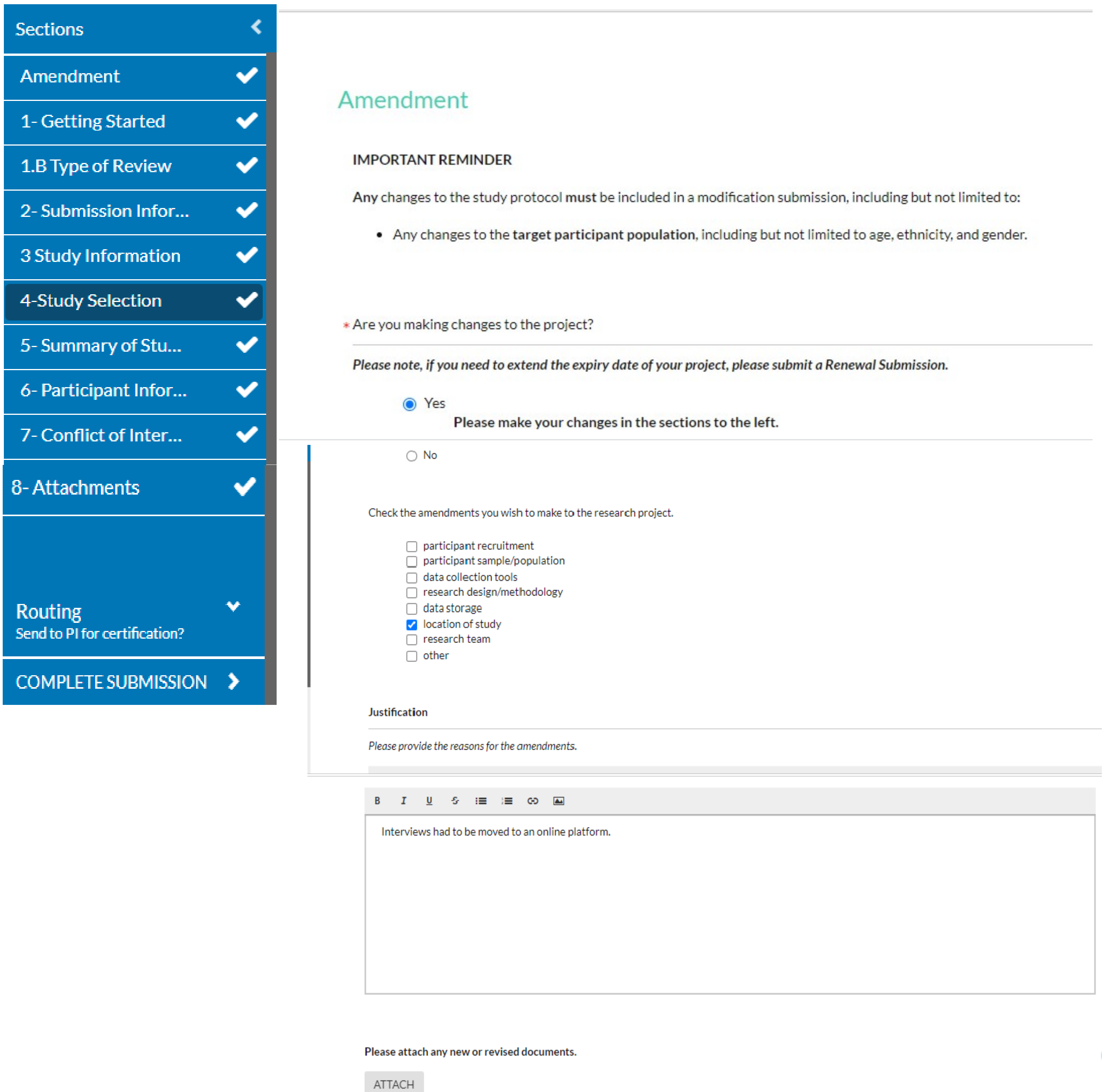
Click **Edit** to begin your submission.



Filling Out Your Submission

Filling out your Amendment is a lot like filling out your Initial Submission with some key differences:

- Some sections may be amendment specific, and are meant to show reviewers what changes have been made within the other sections.



- The other sections are from the approved Initial Submission, and where the amendments are made. Since an Amendment is a request for changes, changes do not go into effect until an Amendment has been approved.

When you're finished, click **Complete Submission**.

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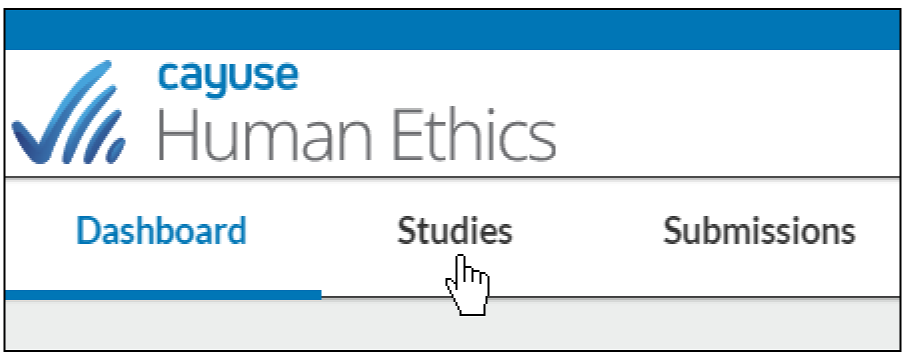
Creating a Renewal Submission

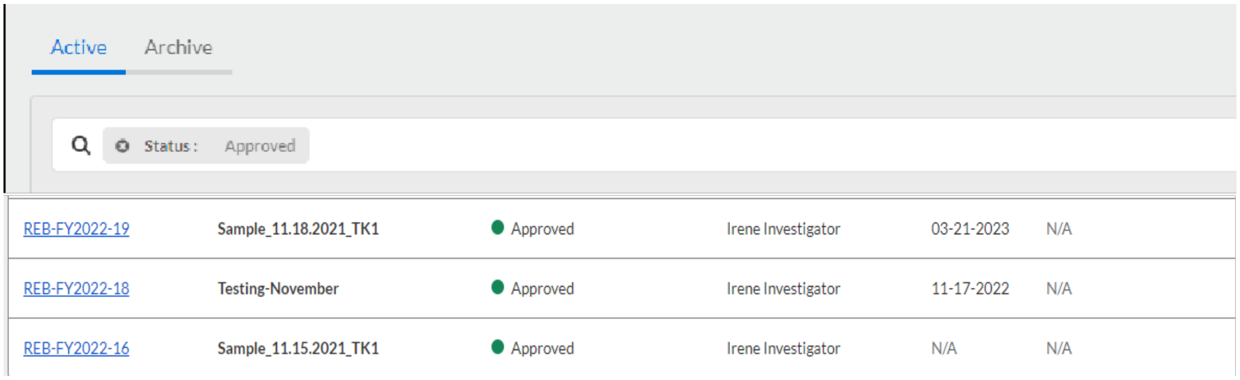
If you have an approved study and need to create a Renewal Submission, you can do so from the Study Details page.

Creating a Renewal Submission

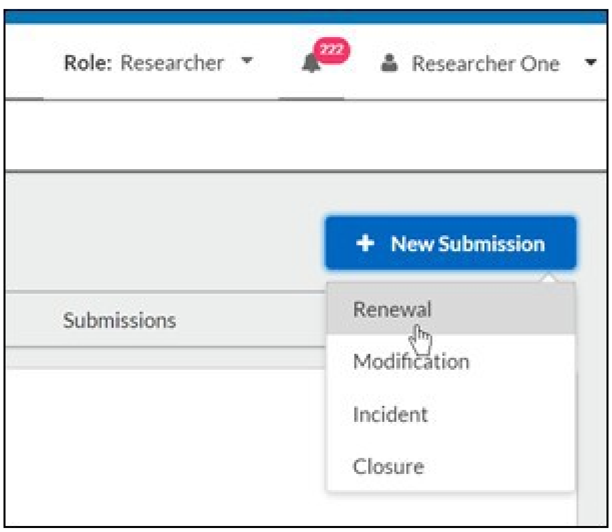
1. From your Researcher Dashboard, click on **Studies**.



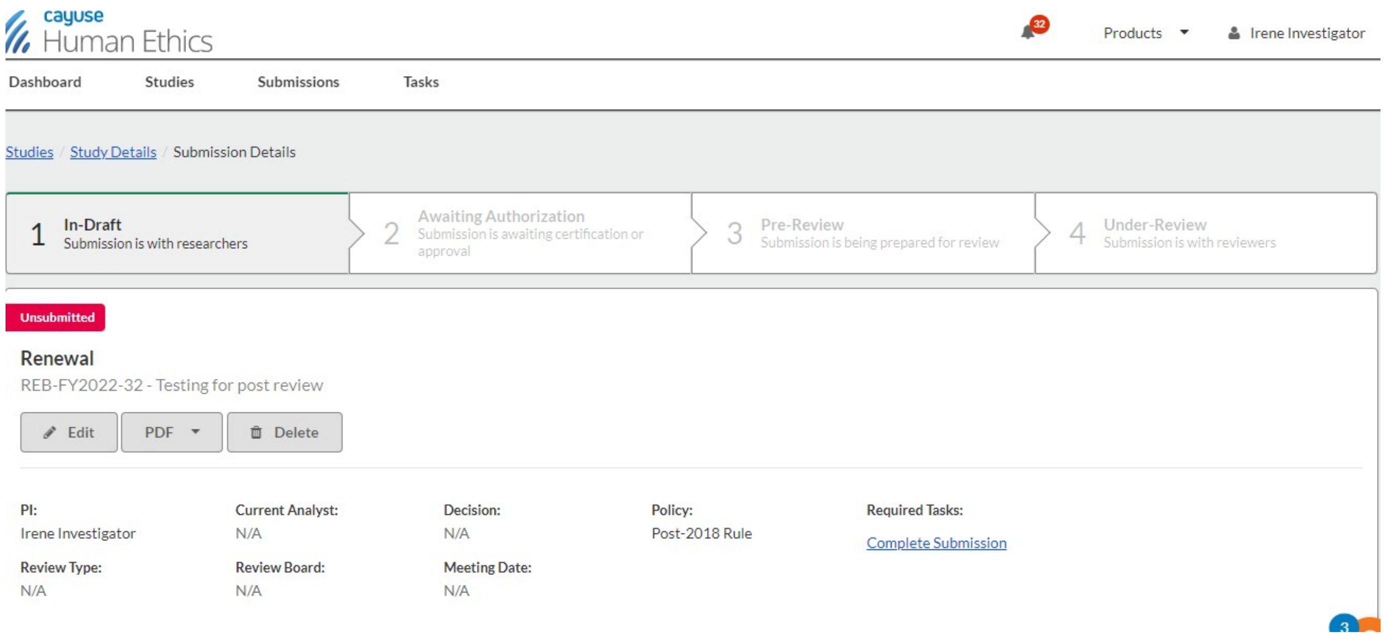
2. Search for the study for which you wish to create a Renewal Submission, and click on the study number. **Please note:** Study must be approved.



3. In the top right-hand corner of the Study Details page, click on the **New Submission** drop- down menu, and click **Renewal**.



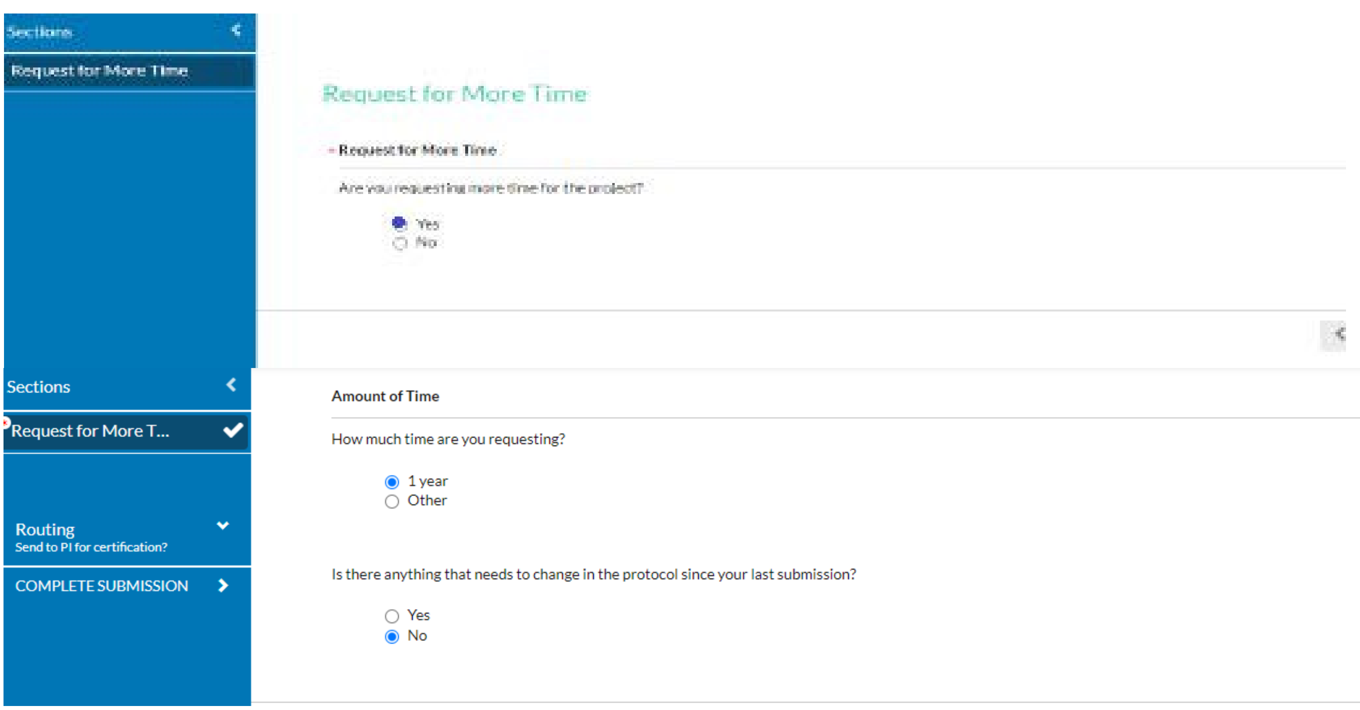
Submission information will populate beneath the Submission Details tab. The person who creates the study is added as the Primary Contact by default, but this can be changed when editing the submission.



Click 

to begin your submission.

Fill out your submission form, and when you're finished, click **Complete Submission** to begin the routing process.



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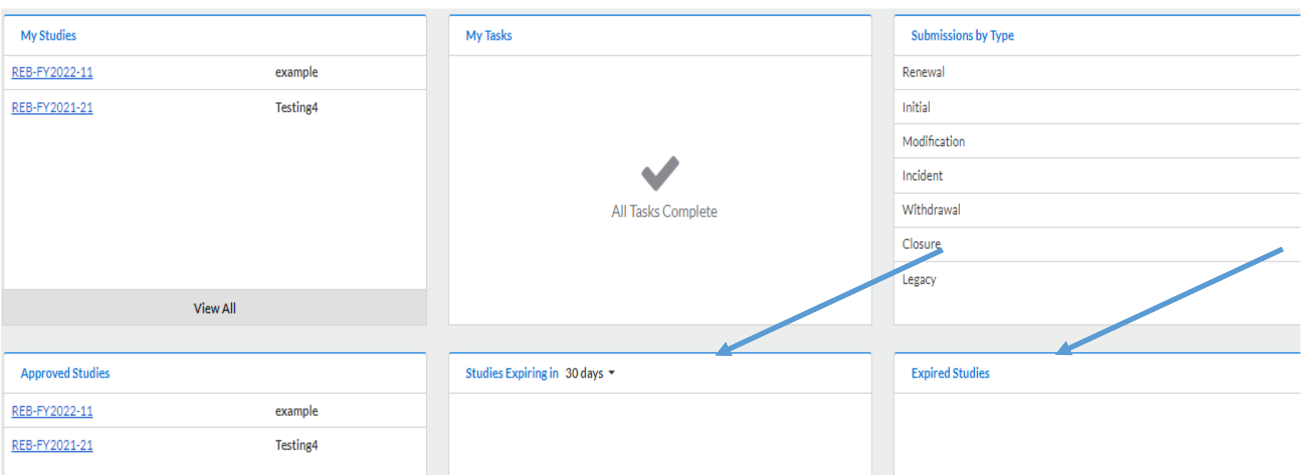
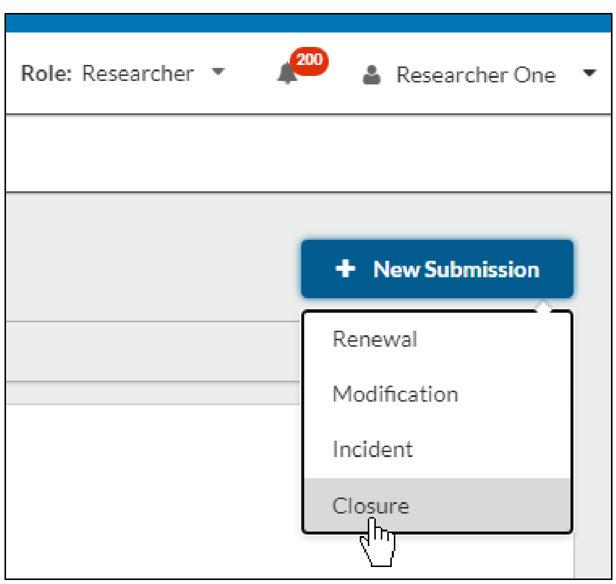
Closing a Study

Your dashboard will display any studies expiring within the next 30 days as well as expired studies.

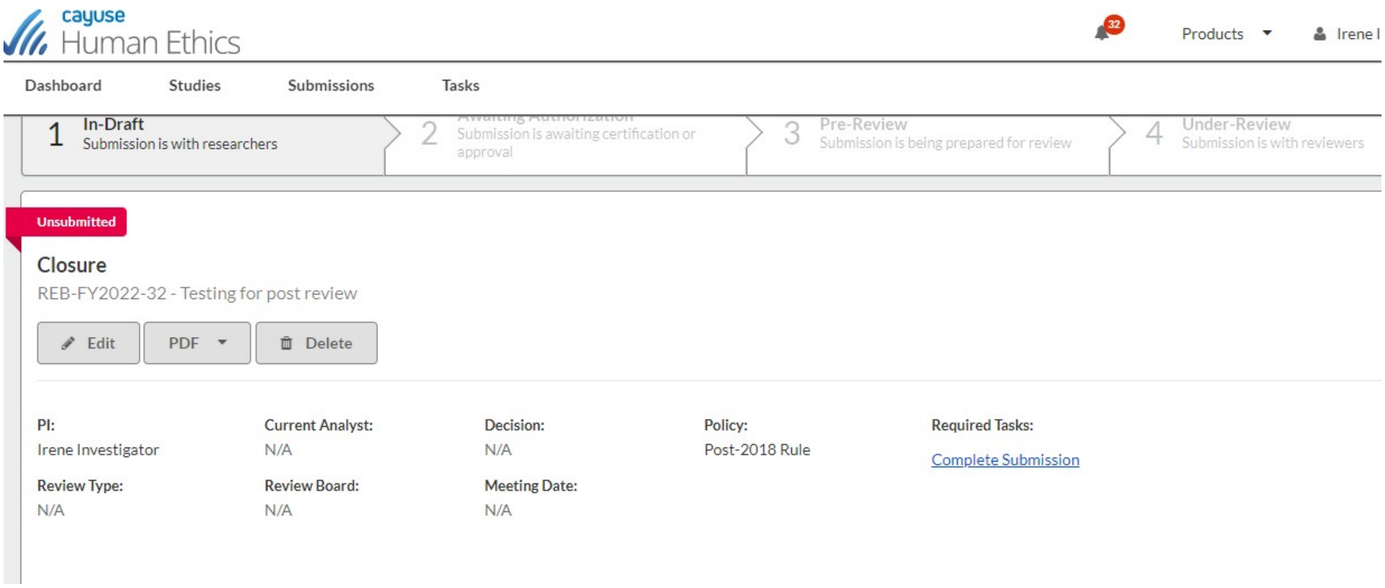


If you need to close your study, you can do so by completing a Study Closure submission.

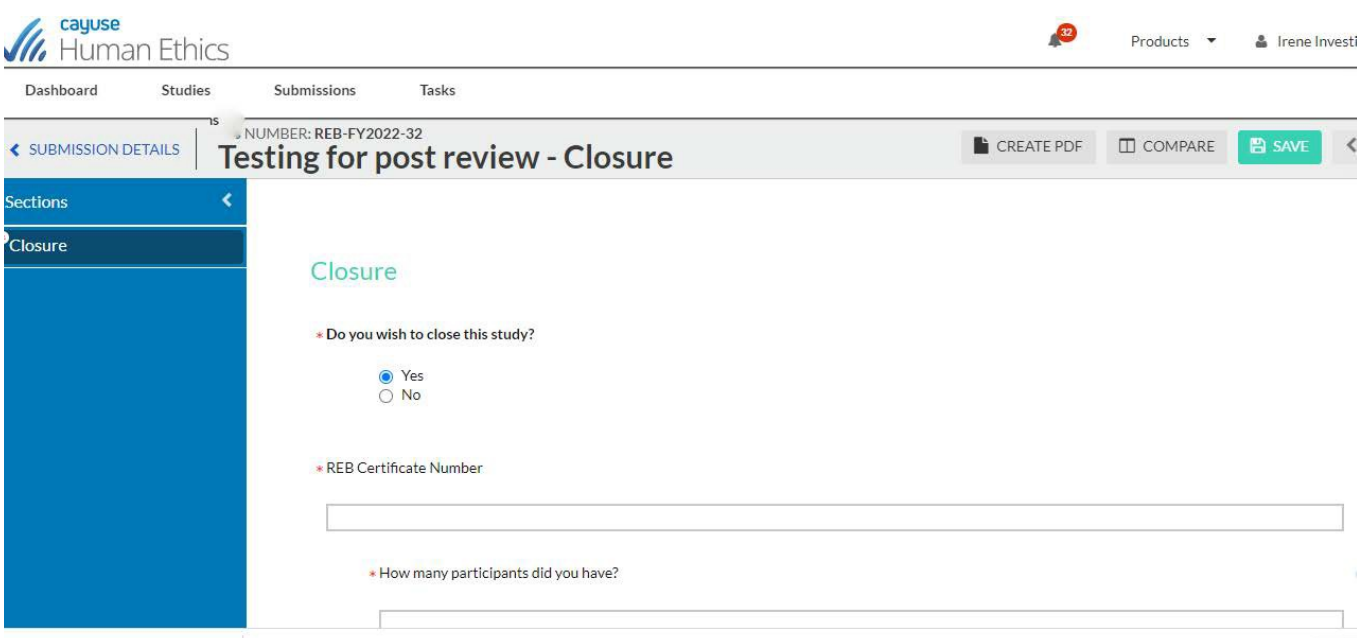
1. On the Study Details page of your study, click on **New Submission** in the top right-hand corner. In the drop-down menu, click **Closure**.



2. On the new Submission Details page, click **Edit**.



3. Fill out the submission form, including all required fields, and click **Complete Submission**.



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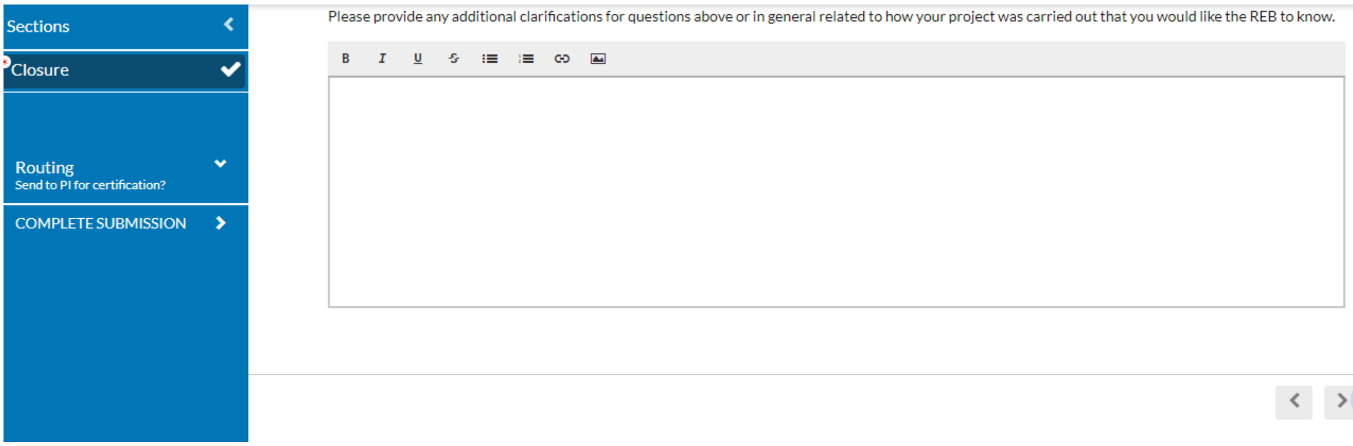

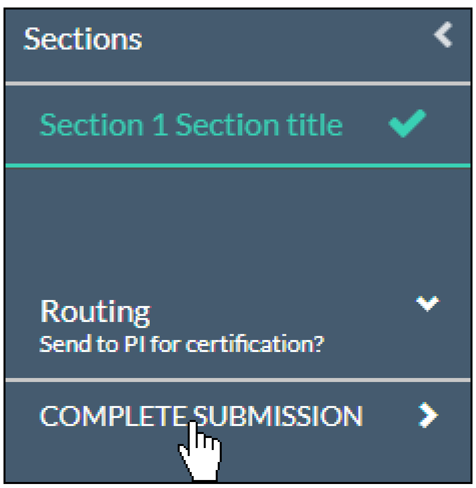

You will then certify the submission. Your institution will now need to approve the closure before your study will be marked as closed.