

Table of Contents

Accessing Your Account	2
Creating a Study	3
PIs who are Students.....	6
Completing a Submission	13
Creating an Amendment Submission.....	16
Creating a Renewal Submission	20
Closing a Study	23

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.



Centralized Sign-In

Type in your College Network Access (CNA) user name and password, then click "Sign in".

[Sign in](#)

[Forgot your password?](#)

Your CNA credentials are the same ones you use for campus computer login and Wi-Fi access at Douglas College.



Creating a Study

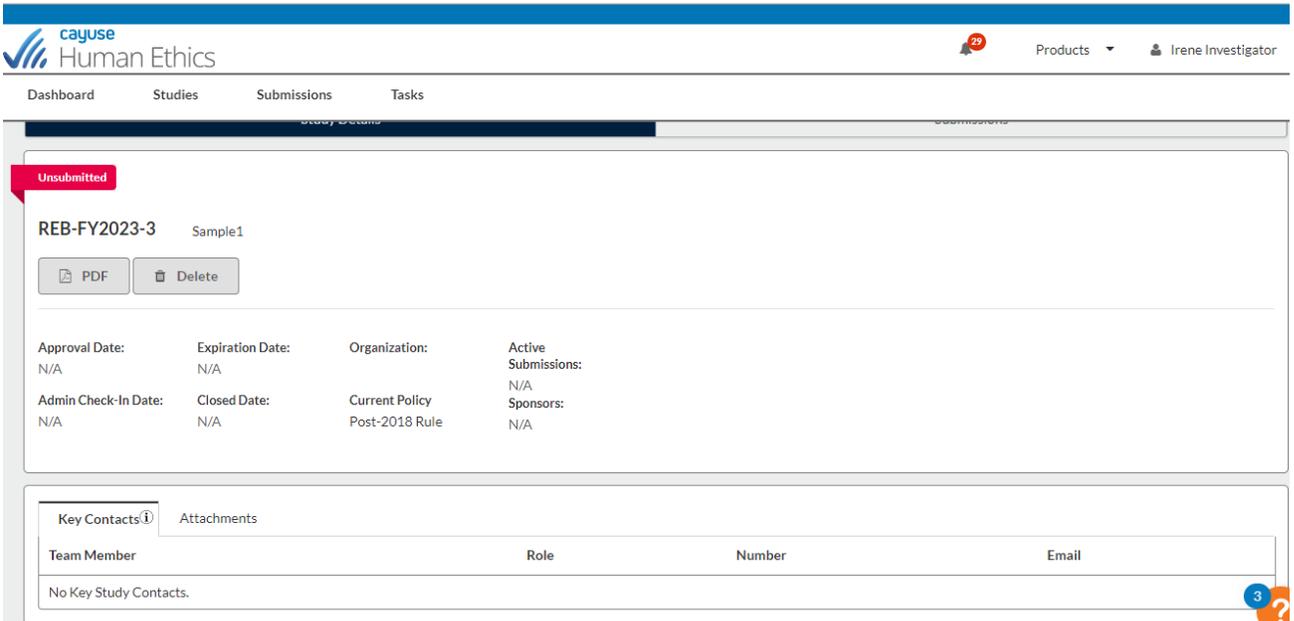
A **Study** is a container for all of your submissions, actions, and changes on a particular research activity. You must create a study before creating your initial submission.

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.

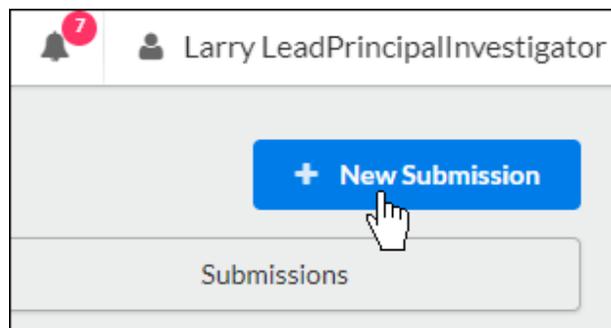
After creating your study, you will be taken to the Study Details page. Here, you will see where important study information will populate once you begin your submission.



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.

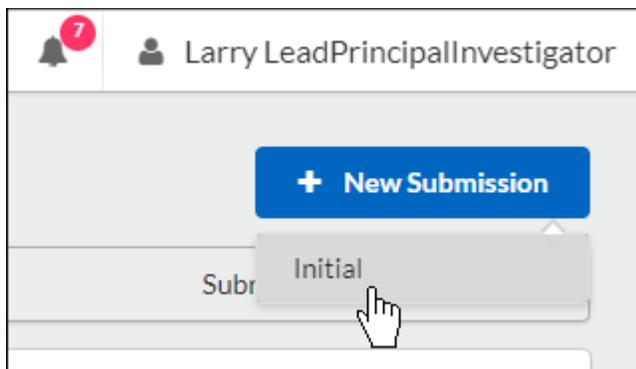
Once you create your study, you can [begin your initial submission](#). Click on **New Submission** in the upper right-hand corner to start completing your forms.



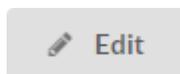


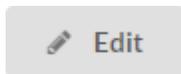
Creating an Initial Submission

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.

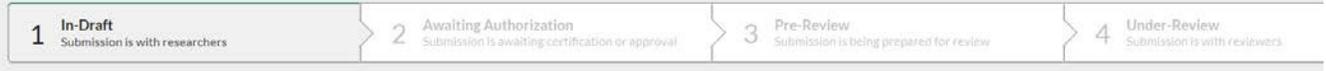


Submission information will populate beneath the Submission Details tab. The person who creates the study is added as the Primary Contact by default, but this can be changed when editing the submission. **Make sure to not remove yourself from all roles and Save, or you will not be able to access your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



Unsubmitted

Initial

REB-FY2023-4 - sample2

Edit PDF Delete

PI:	Current Analyst: N/A	Decision: N/A	Policy: Post-2018 Rule	Required Tasks: Assign PI Assign PG Complete Submission
Review Type: N/A	Review Board: N/A	Meeting Date: N/A		

Approvals Task History Attachments

PIs who are Students

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

* What is the PI's status at Douglas College?

Please note the Principal Investigator listed must be a Douglas College employee or student.

- Faculty
- Student
- Staff
- Administrative

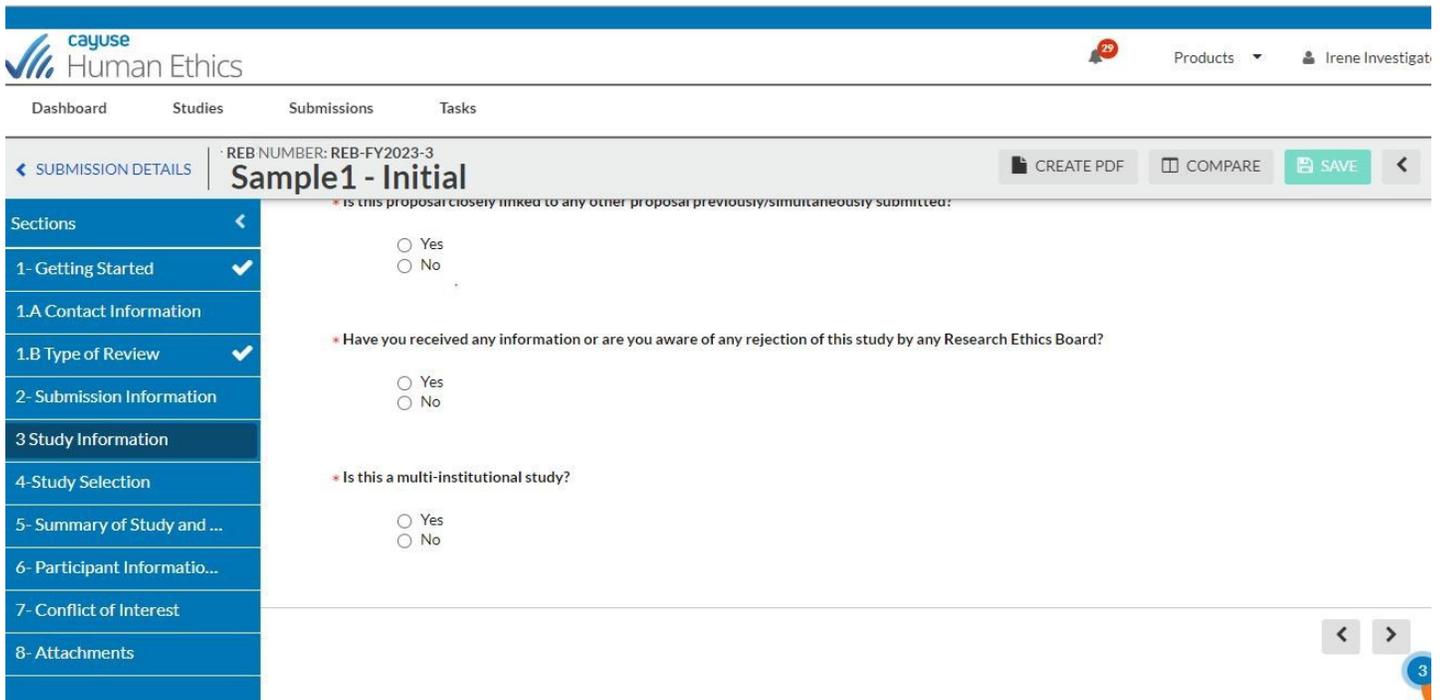
Faculty Sponsor



Provide the name of your Faculty sponsor.

FIND PEOPLE

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.



The screenshot shows the 'cayuse Human Ethics' interface. At the top, there is a navigation bar with 'Dashboard', 'Studies', 'Submissions', and 'Tasks'. The user is logged in as 'Irene Investigat'. The main content area is titled 'SUBMISSION DETAILS' and 'Sample1 - Initial' with 'REB NUMBER: REB-FY2023-3'. There are buttons for 'CREATE PDF', 'COMPARE', and 'SAVE'. A sidebar on the left lists sections: '1- Getting Started', '1.A Contact Information', '1.B Type of Review', '2- Submission Information', '3 Study Information', '4- Study Selection', '5- Summary of Study and ...', '6- Participant Informatio...', '7- Conflict of Interest', and '8- Attachments'. The main form area contains three questions with radio button options:

- * Is this proposal closely linked to any other proposal previously/simultaneously submitted?**
 Yes
 No
- * Have you received any information or are you aware of any rejection of this study by any Research Ethics Board?**
 Yes
 No
- * Is this a multi-institutional study?**
 Yes
 No

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.

- * Have all research personnel completed the required TCPS 2 (2022) tutorial?**

Completion of the previous version of the CORE training module (2018) will be accepted until July 31, 2022 after which time, the 2022 module will be the standard.

- Yes
- No

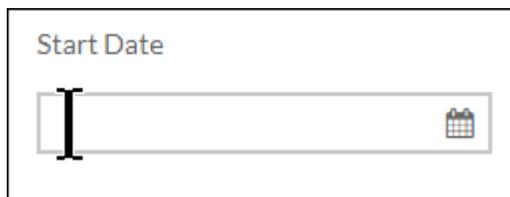
- **Check Boxes:** Select one or more of the available options.

* **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.



A rectangular input field with the text "Start Date" in the top left corner. Inside the field, there is a vertical cursor on the left and a small calendar icon on the right.

- **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.



A single-line rectangular text input field.

- **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.



A rich text editor interface. At the top, there is a toolbar with icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Bulleted List, Numbered List, Undo, and Redo. Below the toolbar is a large, empty rectangular text area for entering the study background and rationale.

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 supports the following file types:

ATTACH

. Human Ethics

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, xlsxm
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.

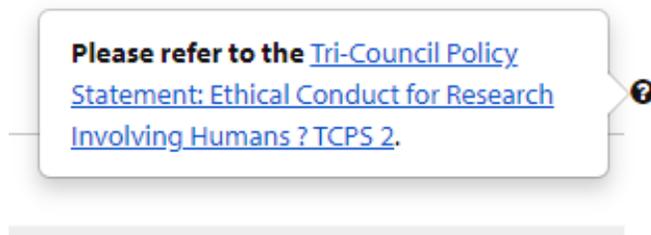
Sections	<
1- Getting Started	✓
1.A Contact Information	
1.B Type of Review	✓
* 2- Submission Information	
3 Study Information	
4- Study Selection	
5- Summary of Study and ...	
6- Participant Informatio...	

 SAVE

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

Help with Questions

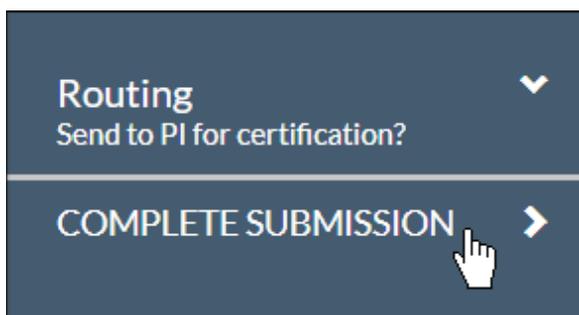
If there is help text for a question, you can click on the  button to view the additional information for that question.



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.

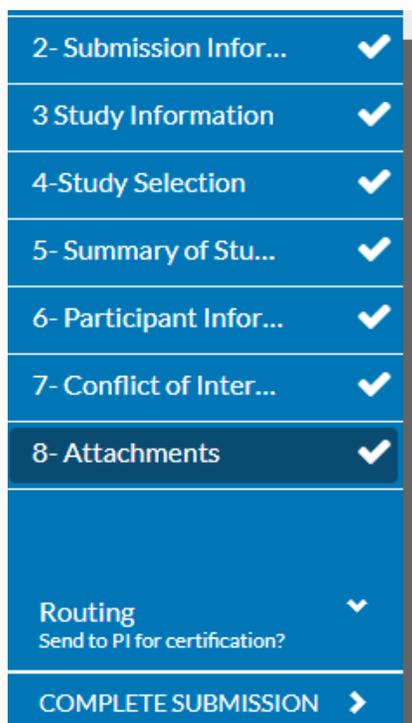
Sections		<
1	Getting Started	
1.A	Contact Information	✓
1.B	Type of Review	
2	Submission Information	🔒
3	Study Information	



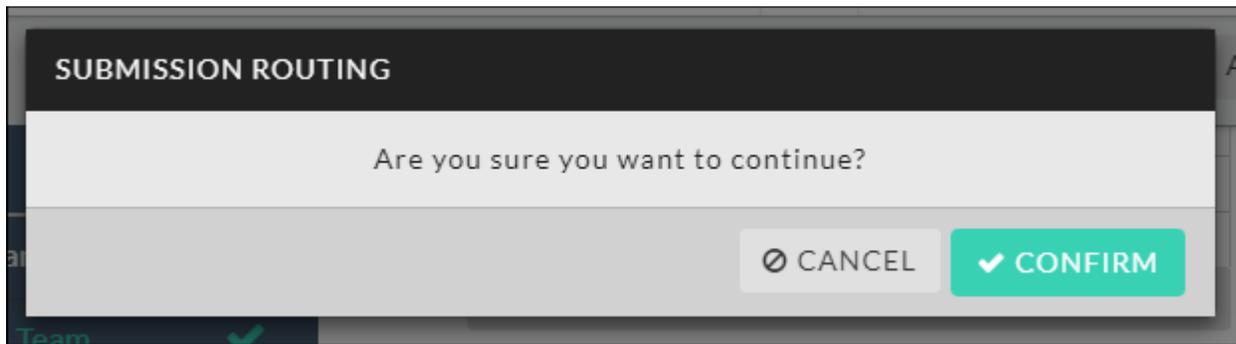
Completing a Submission

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.

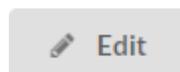
Once the PI has certified the submission, the submission will be routed to the Analyst. The submission may be returned at any point for edits or clarification. **Please note:** If your institution does not have an approver, the submission may be routed directly to the Analyst.

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.

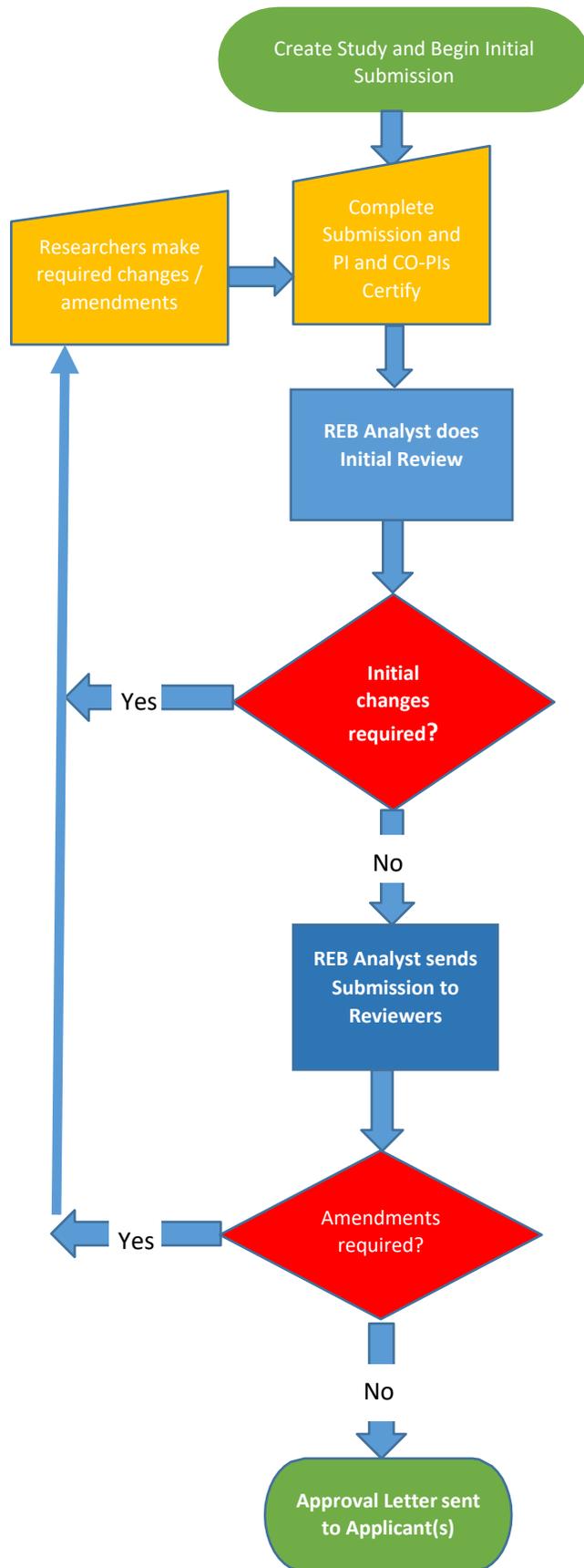
Recertification: If the submission does get returned to the research team, all previous certifications are cleared. All individuals who were required to certify the submission in previous rounds of routing must recertify every time the submission is returned before it can move forward.

Reopening Your Submission



To reopen the submission and make edits, click on the

button within Submission Details.



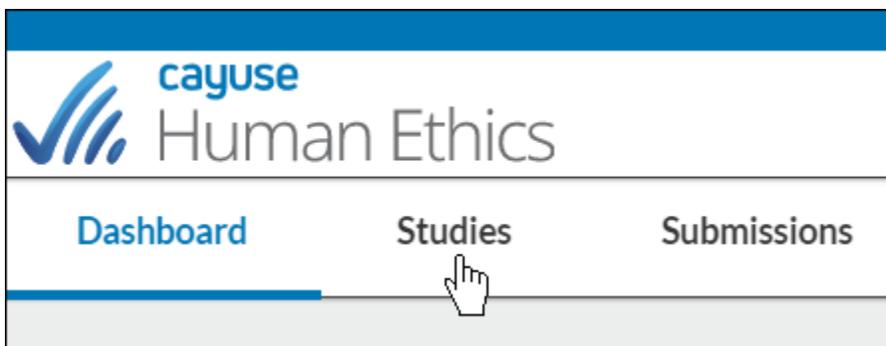
Creating an Amendment Submission

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

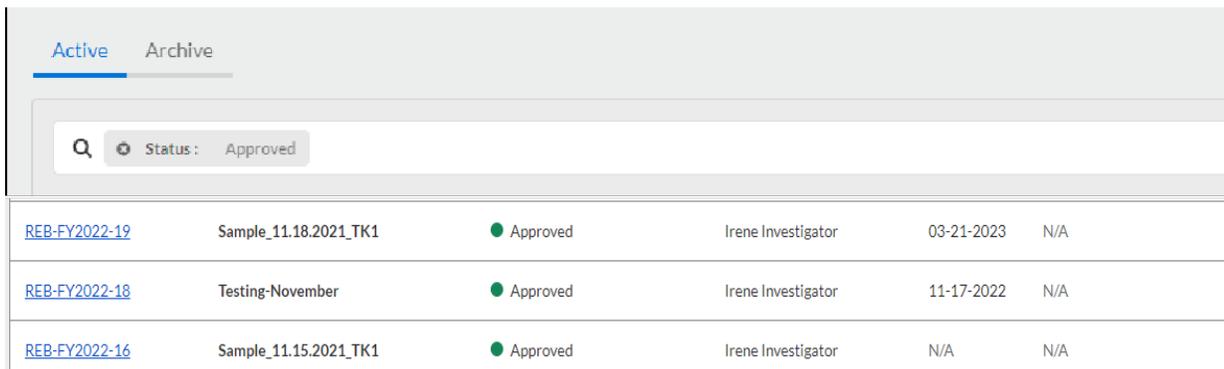
If you have an approved study, but need to create a Modification Submission, you can do so from the Study Details page.

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.

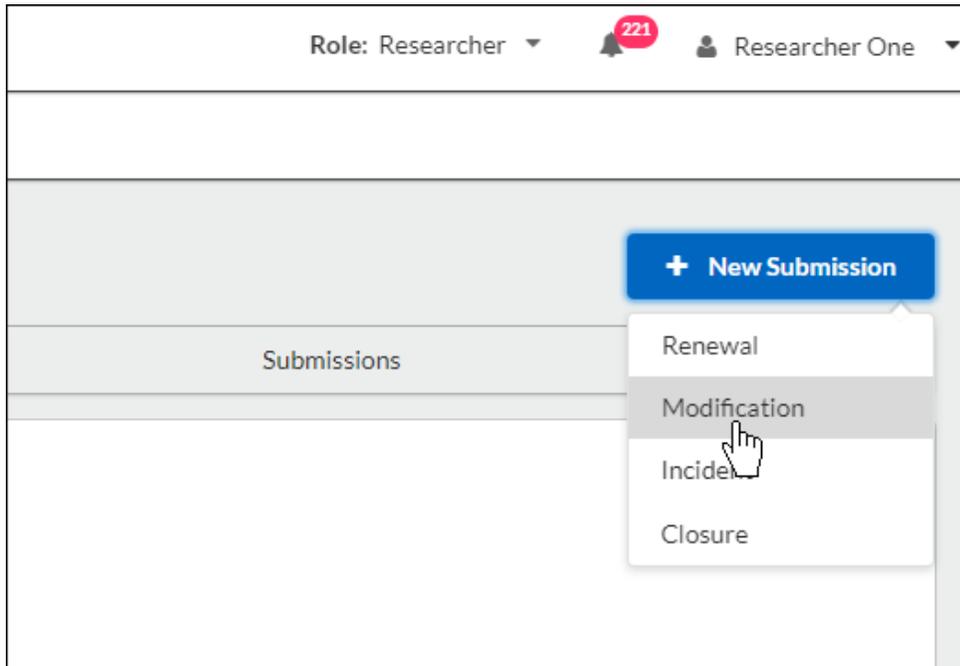


Active Archive

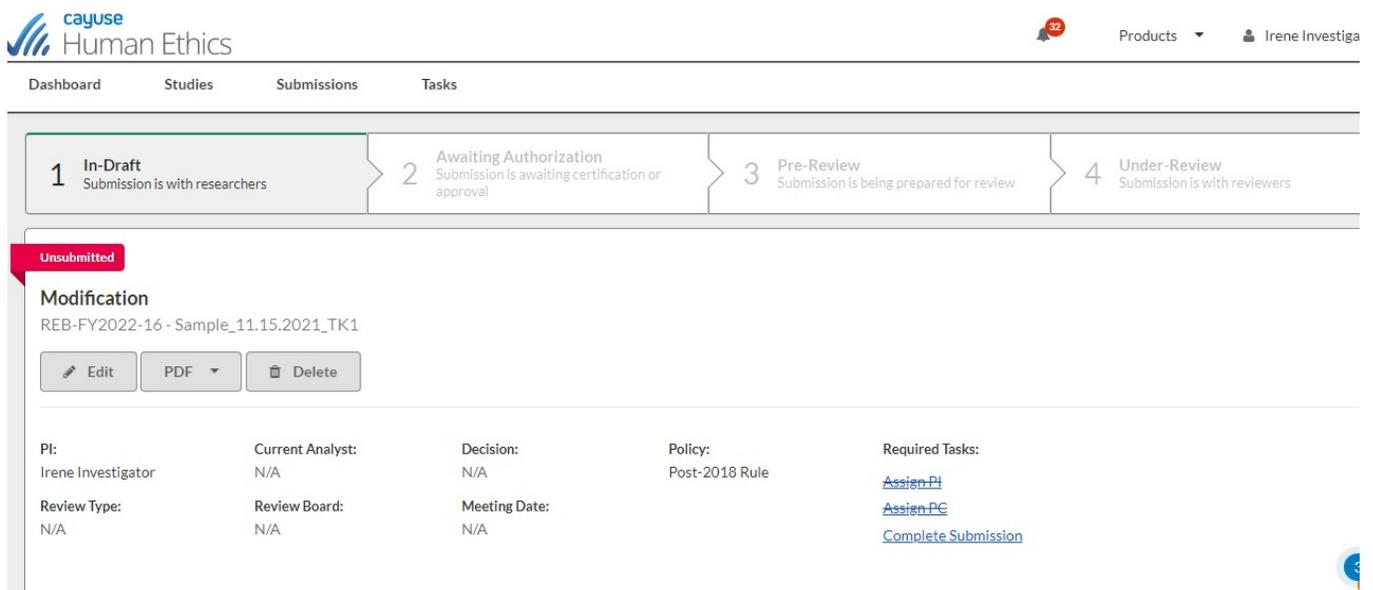
Q Status: Approved

REB-FY2022-19	Sample_11.18.2021_TK1	● Approved	Irene Investigator	03-21-2023	N/A
REB-FY2022-18	Testing-November	● Approved	Irene Investigator	11-17-2022	N/A
REB-FY2022-16	Sample_11.15.2021_TK1	● Approved	Irene Investigator	N/A	N/A

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



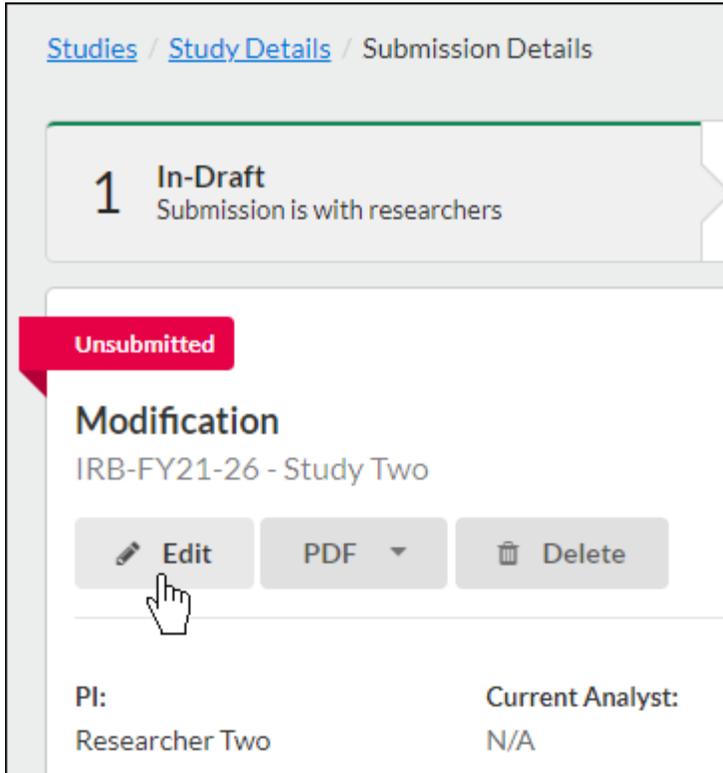
Submission information will populate beneath the Submission Details tab. The person who creates the study is added as the Primary Contact by default, but this can be changed when editing the submission.



The screenshot shows the Cayuse Human Ethics interface. At the top, there is a navigation bar with 'Dashboard', 'Studies', 'Submissions', and 'Tasks'. A progress bar indicates four stages: 1. In-Draft (Submission is with researchers), 2. Awaiting Authorization (Submission is awaiting certification or approval), 3. Pre-Review (Submission is being prepared for review), and 4. Under-Review (Submission is with reviewers). Below the progress bar, a red 'Unsubmitted' banner is visible. The main content area is titled 'Modification' and shows the submission ID 'REB-FY2022-16 - Sample_11.15.2021_TK1'. There are buttons for 'Edit', 'PDF', and 'Delete'. Below this, a table of submission details is displayed:

PI:	Current Analyst:	Decision:	Policy:	Required Tasks:
Irene Investigator	N/A	N/A	Post-2018 Rule	Assign PI
Review Type: N/A	Review Board: N/A	Meeting Date: N/A		Assign PG
				Complete Submission

Click **Edit** to begin your submission.

A screenshot of the Cayuse submission interface. At the top, there is a breadcrumb trail: "Studies / StudyDetails / Submission Details". Below this is a status bar showing "1 In-Draft" and "Submission is with researchers". A red "Unsubmitted" tag is visible. The main section is titled "Modification" and "IRB-FY21-26 - Study Two". There are three buttons: "Edit" (with a pencil icon), "PDF" (with a dropdown arrow), and "Delete" (with a trash icon). A hand cursor is pointing at the "Edit" button. Below the buttons, there are two fields: "PI: Researcher Two" and "Current Analyst: N/A".

[Studies](#) / [StudyDetails](#) / Submission Details

1 In-Draft
Submission is with researchers

Unsubmitted

Modification
IRB-FY21-26 - Study Two

 **Edit** **PDF** ▼  **Delete**

PI:
Researcher Two

Current Analyst:
N/A

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.

- Sections <
- Amendment ✓
- 1- Getting Started ✓
- 1.B Type of Review ✓
- 2- Submission Infor... ✓
- 3 Study Information ✓
- 4- Study Selection ✓
- 5- Summary of Stu... ✓
- 6- Participant Infor... ✓
- 7- Conflict of Inter... ✓
- 8- Attachments ✓
- Routing Send to PI for certification? ▾
- COMPLETE SUBMISSION >

Amendment

IMPORTANT REMINDER

Any changes to the study protocol **must** be included in a modification submission, including but not limited to:

- Any changes to the **target participant population**, including but not limited to age, ethnicity, and gender.

*Are you making changes to the project?

Please note, if you need to extend the expiry date of your project, please submit a Renewal Submission.

Yes

Please make your changes in the sections to the left.

No

Check the amendments you wish to make to the research project.

- participant recruitment
- participant sample/population
- data collection tools
- research design/methodology
- data storage
- location of study
- research team
- other

Justification

Please provide the reasons for the amendments.

B I U S L B G M

Interviews had to be moved to an online platform.

Please attach any new or revised documents.

ATTACH

- 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**.

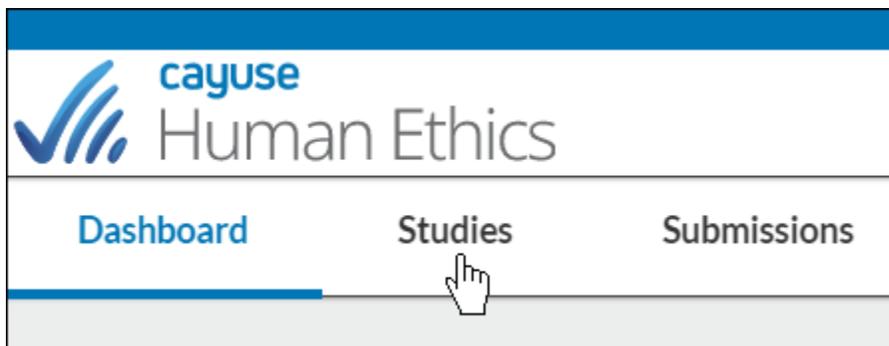


Creating a Renewal Submission

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**.



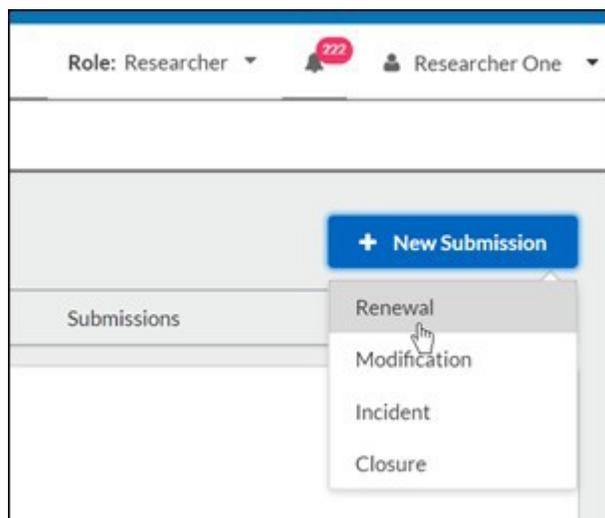
2. Search for the study for which you wish to create a Renewal Submission, and click on the study number. **Please note:** Study must be approved.

Active Archive

Q Status: Approved

REB-FY2022-19	Sample_11.18.2021_TK1	● Approved	Irene Investigator	03-21-2023	N/A
REB-FY2022-18	Testing-November	● Approved	Irene Investigator	11-17-2022	N/A
REB-FY2022-16	Sample_11.15.2021_TK1	● Approved	Irene Investigator	N/A	N/A

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.



Unsubmitted

Renewal

REB-FY2022-32 - Testing for post review

Edit PDF Delete

PI: Irene Investigator	Current Analyst: N/A	Decision: N/A	Policy: Post-2018 Rule	Required Tasks: Complete Submission
Review Type: N/A	Review Board: N/A	Meeting Date: N/A		



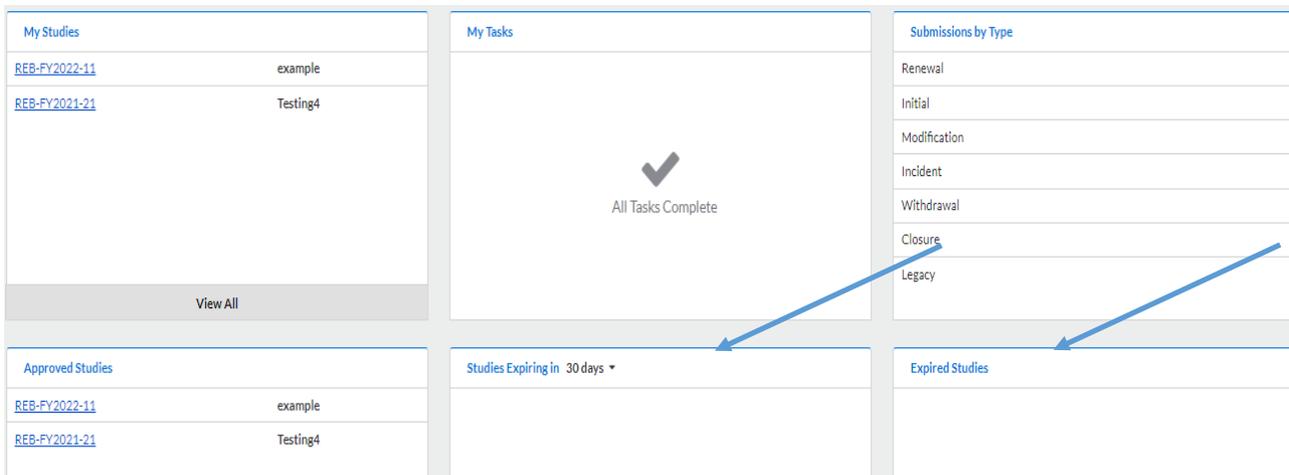
Click  to begin your submission.

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

The screenshot shows a mobile-style interface with a blue sidebar on the left and a white main content area. The sidebar has a 'Sections' header and a list of items: 'Request for More Time' (selected with a checkmark), 'Routing' (with a dropdown arrow), and 'COMPLETE SUBMISSION' (with a right-pointing arrow). The main content area has a title 'Request for More Time' and a section header '- Request for More Time'. Below this is a question: 'Are you requesting more time for the project?' with radio buttons for 'Yes' (selected) and 'No'. The next section is 'Amount of Time' with the question 'How much time are you requesting?' and radio buttons for '1 year' (selected) and 'Other'. The final section is 'Is there anything that needs to change in the protocol since your last submission?' with radio buttons for 'Yes' and 'No' (selected).

Closing a Study

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



The screenshot shows a dashboard with three main columns. The left column, 'My Studies', contains a table with two rows: 'REB-FY2022-11 example' and 'REB-FY2021-21 Testing4', with a 'View All' button below. The middle column, 'My Tasks', shows 'All Tasks Complete' with a checkmark icon. The right column, 'Submissions by Type', is a vertical list: 'Renewal', 'Initial', 'Modification', 'Incident', 'Withdrawal', 'Closure', and 'Legacy'. Below these are three sections: 'Approved Studies' (table with two rows), 'Studies Expiring in 30 days' (with a dropdown arrow), and 'Expired Studies'. Two blue arrows point from the 'Closure' item in the 'Submissions by Type' list to the 'Studies Expiring in 30 days' and 'Expired Studies' sections.

My Studies	
REB-FY2022-11	example
REB-FY2021-21	Testing4
View All	

My Tasks	
✓ All Tasks Complete	

Submissions by Type	
Renewal	
Initial	
Modification	
Incident	
Withdrawal	
Closure	
Legacy	

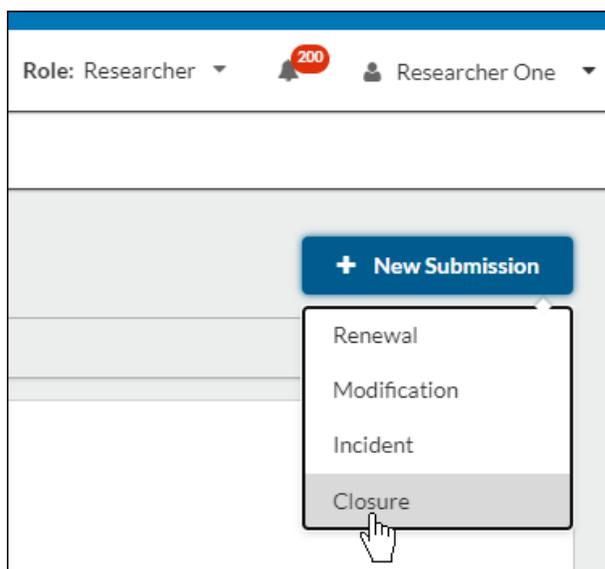
Approved Studies	
REB-FY2022-11	example
REB-FY2021-21	Testing4

Studies Expiring in 30 days ▾	
-------------------------------	--

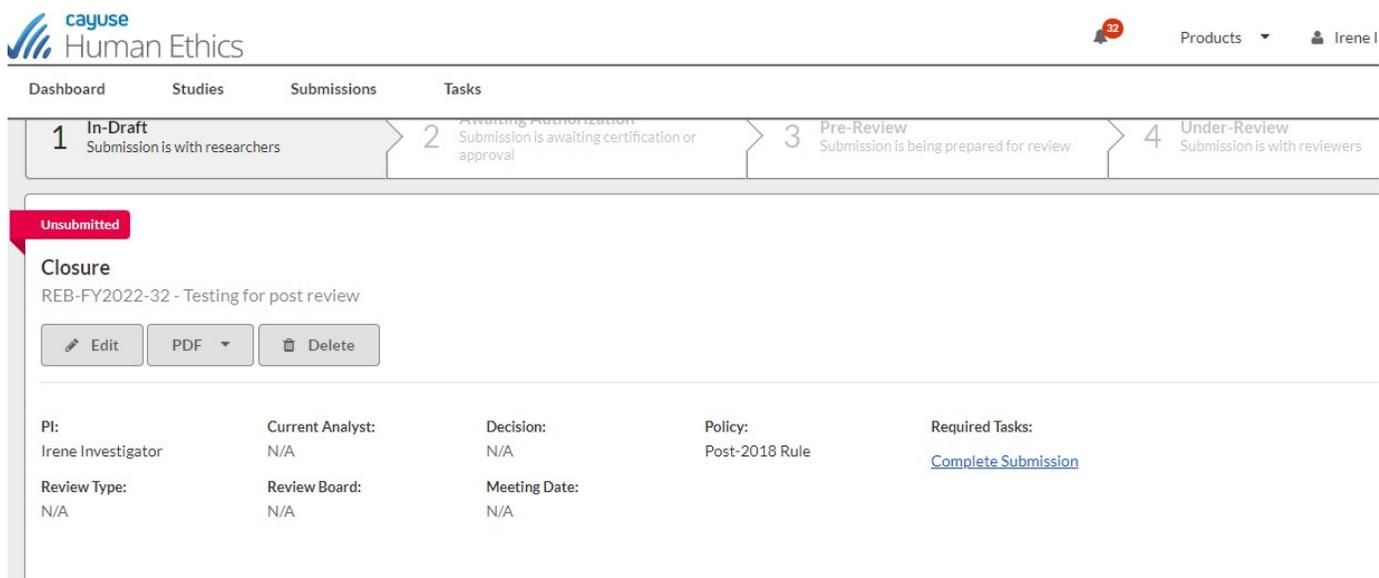
Expired Studies	
-----------------	--

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**.



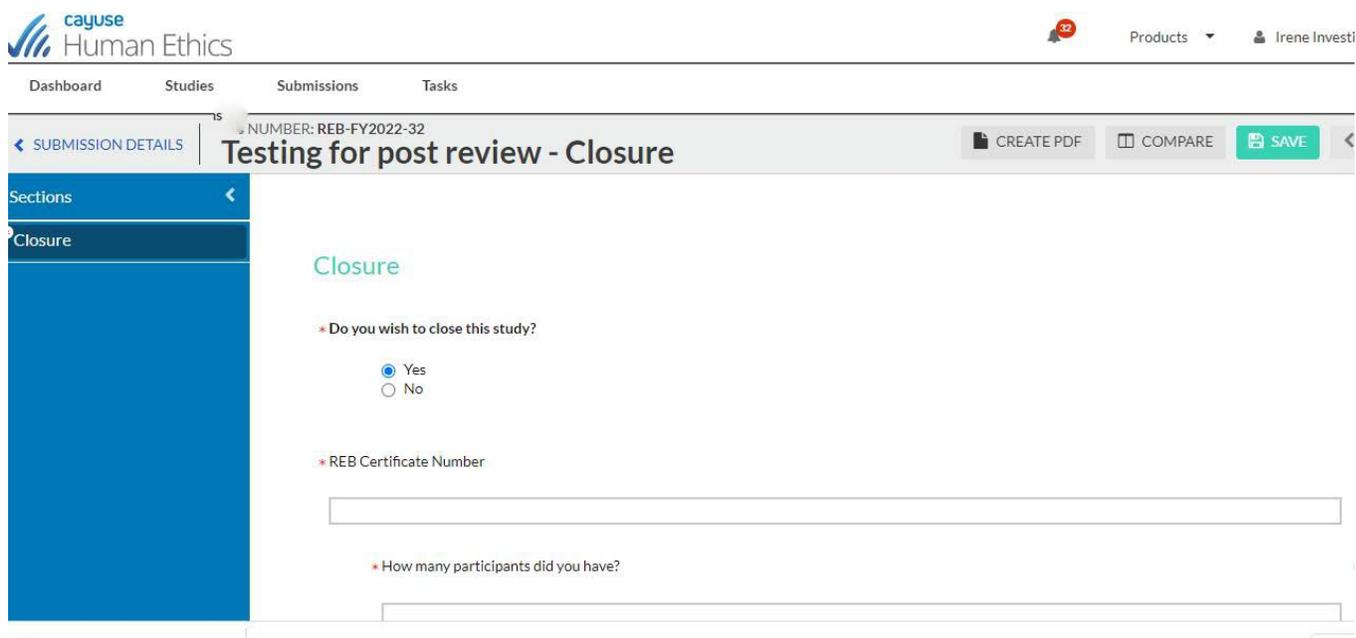
2. On the new Submission Details page, click **Edit**.



The screenshot shows the Cayuse Human Ethics dashboard. At the top, there is a navigation bar with 'Dashboard', 'Studies', 'Submissions', and 'Tasks'. A progress bar indicates four stages: 1. In-Draft (Submission is with researchers), 2. Awaiting Authorization (Submission is awaiting certification or approval), 3. Pre-Review (Submission is being prepared for review), and 4. Under-Review (Submission is with reviewers). Below the progress bar, a red 'Unsubmitted' banner is visible. The main content area displays details for a submission titled 'Closure' with ID 'REB-FY2022-32 - Testing for post review'. There are buttons for 'Edit', 'PDF', and 'Delete'. Below this, a table of metadata is shown:

PI:	Current Analyst:	Decision:	Policy:	Required Tasks:
Irene Investigator	N/A	N/A	Post-2018 Rule	Complete Submission
Review Type:	Review Board:	Meeting Date:		
N/A	N/A	N/A		

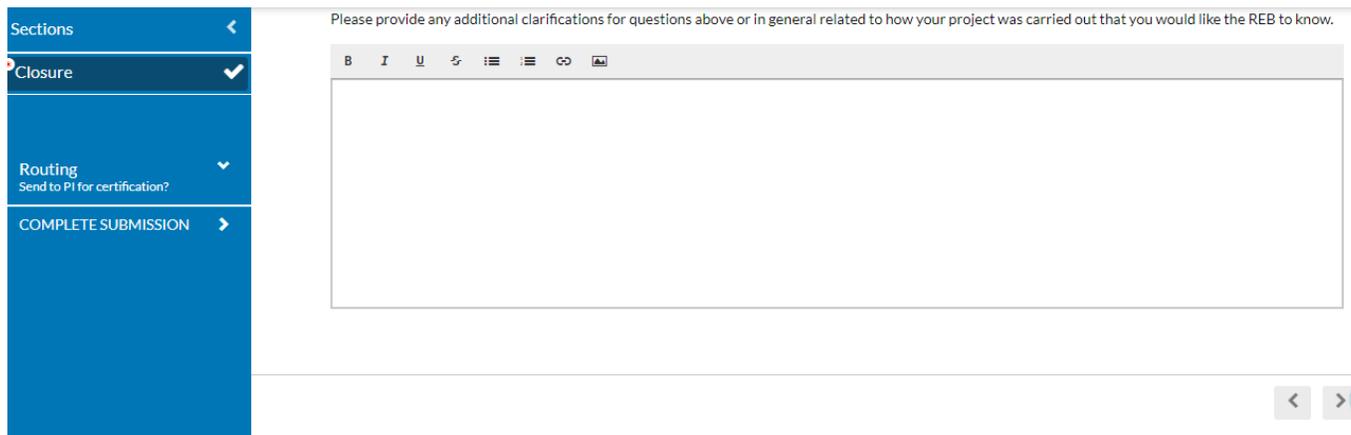
3. Fill out the submission form, including all required fields, and click **Complete Submission**.



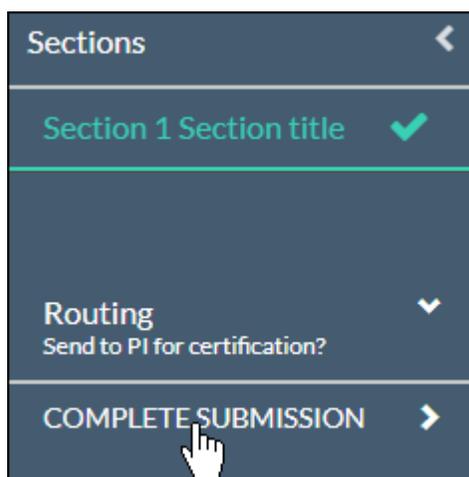
The screenshot shows the 'SUBMISSION DETAILS' page for 'Testing for post review - Closure' (NUMBER: REB-FY2022-32). The page has a blue sidebar with 'Sections' and 'Closure' listed. The main content area contains the following form fields:

- Closure**
- Do you wish to close this study?** (Radio buttons: Yes, No)
- REB Certificate Number** (Text input field)
- How many participants did you have?** (Text input field)

At the top right of the form area, there are buttons for 'CREATE PDF', 'COMPARE', and 'SAVE'.



The screenshot shows a web interface with a blue sidebar on the left. The sidebar contains the following items: 'Sections' with a left arrow, 'Closure' with a checkmark, 'Routing' with a dropdown arrow and the text 'Send to PI for certification?', and 'COMPLETE SUBMISSION' with a right arrow. The main content area has a heading 'Please provide any additional clarifications for questions above or in general related to how your project was carried out that you would like the REB to know.' Below this is a text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Undo, Redo, Bulleted List, Numbered List, Link, and Image. The text editor is currently empty. At the bottom right of the main content area, there are two small navigation buttons: a left arrow and a right arrow.



This is a close-up view of the sidebar menu. It shows the 'COMPLETE SUBMISSION' option at the bottom, which is highlighted with a white hand cursor. Above it is the 'Routing' option with a dropdown arrow and the text 'Send to PI for certification?'. At the top of the sidebar is the 'Section 1 Section title' option with a green checkmark. The sidebar has a dark blue background and a white border.

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