How to Submit Projects into the Boston Strong Workflow Management System

Lapham, Kevin
12/31/14

How to Submit a New Project for Review

The first thing you will need to do is email Research Administration at: VHANYHResearchSubmissions@va.gov

Please provide a brief description of the project you intend to submit, the names of all the members of the research team, and which committee/committees you anticipate submitting to (e.g. IRB, IACUC, or R&D). This email will serve as the "Cover Memo" previously submitted.

Upon receipt of this notification, you will be granted access to the Boston Strong Workflow or you will be notified, by email, to proceed with your submission into the workflow.

When you are first granted access, you will receive an email notification of this. We recommend saving this email and/or bookmarking the page for future use.

At the workflow homepage, left click the blue button labeled "Create a Project Submission." At the next screen choose your submission type from the first dropdown menu (i.e. Initial, Continuing, Amendment), and then the Study Type from the second dropdown menu (i.e. Human Study, Animal, Human Data Only, etc.) and then left click on the hyperlink "next" in the text that appears.

Provide as much information as possible on the next screen but, at minimum, you must provide a Project Name and the PI's Name. If you are the Project Coordinator, identify yourself as "POC" (Point of Contact), and then left click on the button labeled "ok."

The system will take over for a bit, as it provisions documents for your project, and then you will be taken to a new screen that will list all the possible documents for your project.

The first thing you will want to do is personalize the folder that has been created. To do this, look at the folder properties shown on the upper left side of the screen. You will see a title similar to "LastName-123-initial-1." Below this you will see the title, project name, project number, PI, and more. Beneath this are 2 hyperlinks: "View All Properties" and "Edit Properties." Left click on "Edit Properties." You may now edit the Folder name, Title, and Project Name to something more readily identifiable to you. This will aid in returning to the

documents later, should you need to. Once you've made your changes, left click on "Save" at the top of the window.

Scroll down the page and complete any forms you need, but begin with the Proposed Project Questionnaire. This will provide guidance on what other forms you will need. (Additional forms will be listed at the end…**note – if the Human Studies Questionnaire is not listed at the bottom, you don't need to fill it out**. Forms in the workflow appear in one of three formats: Microsoft Word documents, Adobe PDF forms, or Microsoft InfoPath forms. Each is completed and saved slightly differently.

- **Microsoft Word Documents:**

Left click the name of the form you wish to complete, and a new window will open with an image of the form. On the control ribbon at the top of the page, left click "Open in Word." In the pop-up window, select "Edit" and then left click "OK." After a few moments, Microsoft Word will open with the document. Complete the form and then, at the very top left corner, above the "File" tab, you will see an icon of a floppy disk with a small green circle in the corner (2 arrows pointing to each other). Left click this icon to save your changes to the document in the workflow. You may then close the Microsoft Word window.

- **Adobe PDF Forms**

Left click the name of the form you wish to complete, and then, in the pop-up window, select "Edit" and then left click "OK." After a few moments, Adobe Acrobat will open and you should be prompted with a pop-up indicating the form you are about to open. Left click on the button labeled "Check Out & Open." (Note: if you are not prompted at this time, do not worry; there will be more opportunities to resolve this.) Complete the form and, when done, left click the word "File" at the very top, left-hand corner of the window. In the box that opens, move your cursor over the words "SharePoint/Office 365 Server", then move your cursor right and left click "Check In." You may then close Adobe Acrobat, if it does not close automatically. (If you were not prompted to "Check Out & Open", you may simply attempt to close the document…Adobe will prompt you to check out the document then. Attempting to close a form that is checked out will also cause Adobe to warn you to check in the document.)

- **Microsoft InfoPath Forms**

This will be the easiest method to complete documents. Left click on the name of the form you wish to complete. The form will open, editable, in the browser window. Complete the form and left click "Save" at the top of the form. Left click "Close." You may be prompted, again, to save changes. If you are, left click "Yes." The form will close and you will be returned to the main document set.

- **Exceptions**

A few forms are for Administrative Use Only. You do not need to complete these at all. They are:

  - ISO Research Review Checklist
  - PO Research Review Checklist
  - VANYHHS IRB Reviewer Eval

Once you've completed all the forms, you will probably need to upload some other materials (Research Protocol, Training Certificates, etc.). Click the button above the documents labeled "Upload a Document". You now have 2 options for uploading. You can search for individual documents on your computer by simply left clicking on the button labeled "Browse" and searching for the folder and document. This will only allow you to upload a single document at a time. If you have multiple documents to upload, however, you can speed the process by left clicking on the words "Upload Multiple Files…". This will open a new window into which you can drag and drop files from your computer. Either way you choose, simply left click "OK" once you've added the document(s) you want to upload.

Once you've completed your application forms, simply left click on the button labeled "Submit to Research admin" and the system will take over and route the project to ISO, PO, Safety, IACUC/IRB, R&D, and anywhere else it may need to go for approval. The first stop, however, will be to the PI (if submitted by a coordinator) for verification and signatures. The PI will enter the document set, complete the PI Signature Page, and, using his/her PIV card, apply an

electronic signature to cover all documents submitted for review. (You'll no longer need to get him/her to sign each and every single form).

Should you happen to click the "Submit…" button and nothing happens, do not panic. Look to the left side of the screen and you will see several options. Left click on the words "Project Management". Scroll down until you see the name of your project. Place your cursor over the title and then left click on the small dropdown arrow that appears beside the name. In the new menu window that appears, left click on the word "Workflows". On the next window, regardless of the type of submission (i.e. animal, human, data only), search for "IRB Review NYH" and left click the button to the left of it. The process will adjust based on the type of submission…this is the starting point for ALL research submissions (even Continuing Reviews and Amendments).

Changes

Should you need to alter anything (for example, if the PO requires a change to the Informed Consent Form), you will be informed by email.

Go to the Boston Strong site, as normal; however instead of clicking "Create a Project Submission", left click the words "Project Management" on the left hand side of the screen. This will take you to a list of all research submissions. Scroll down until you find the name of your project and left click on it. This will take you into the document to make the necessary changes. Once you've made your corrections and saved them, simply email the person who requested the changes and let them know they're done. DO NOT resubmit.

NOTES