

Getting Started with RAS

RAS Training Documentation

Last Modified: July 30, 2024

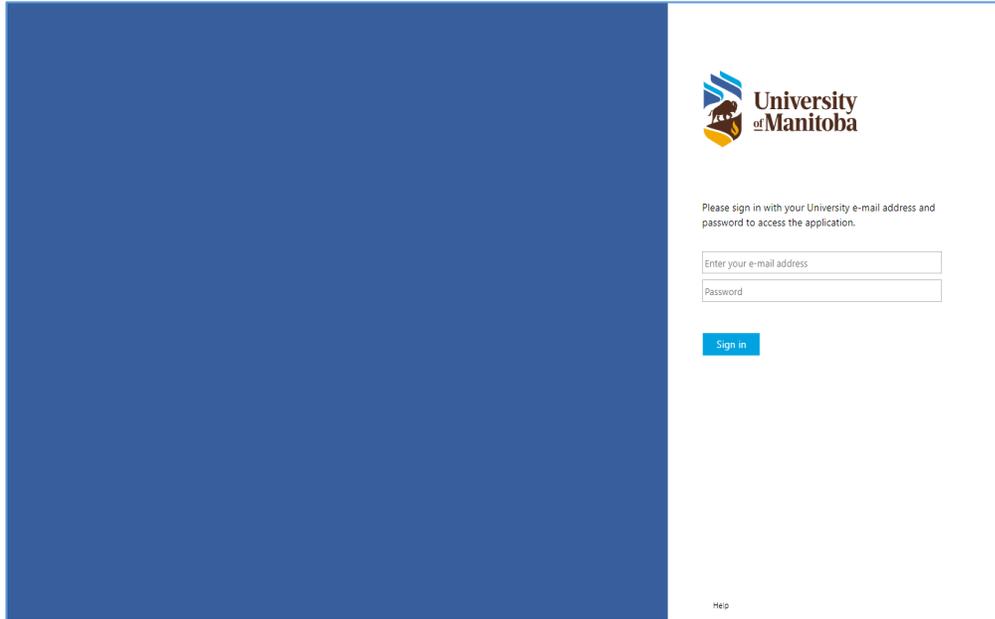
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Logging In

1. Go to: <https://researchadminsystem.umanitoba.ca/home/>
2. Log into the system using your University of Manitoba email and password
3. Click **Sign in**



Portal Layout

There are 2 main views for the system: [To Do List](#) and [Integrated Task List](#).

The **To Do List** view has a dedicated to do list on the left-hand side of the screen. This allows you to quickly see what task you must complete or communication notices easily. Here you can see your to do's and cases (protocols) in one view. **This is the default view for all users.**

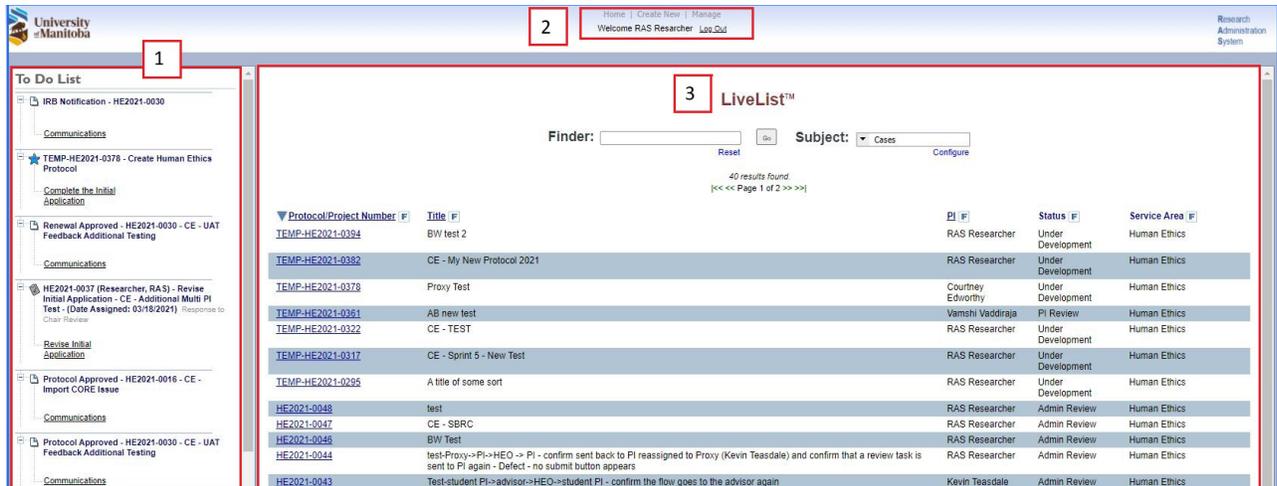
The **Integrated Task List** view incorporates the To Do list into a dedicated task list. This allows you to sort and filter through your tasks easily. This view is meant for users that receive a lot of tasks/to do's daily, i.e. Office of Human Research Ethics staff.

Note: Any user can request to have the **Integrated Task List** view instead of the **To Do List** view. Please contact the system administrator to make this change.

To Do List View

There are three sections to take note of when you login to the system.

1. **To Do List** – The To Do List contains tasks and messages for the logged in user to complete.
2. **Menu Bar** – The Menu Bar provides access to major functions of the system based upon the role(s) assigned to the user. This area also displays the name of the logged in user and provides the function to log out of the system.
3. **LiveList** – This displays all Protocols & Projects where you have View, Edit or Signature access functionality.

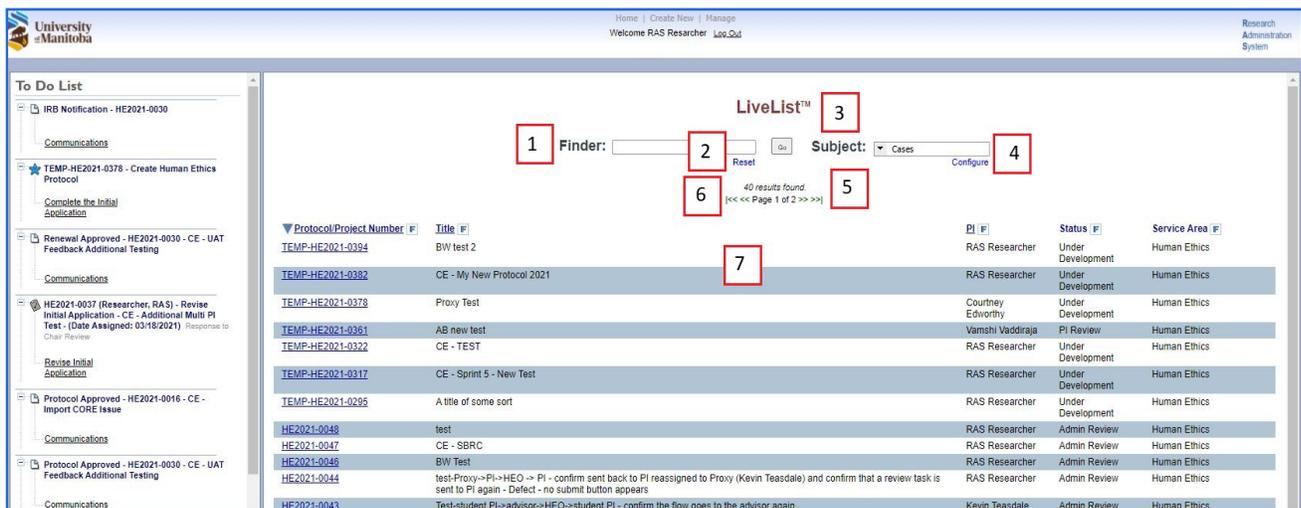


The screenshot shows the LiveList™ interface with the following callouts:

- 1**: Points to the 'To Do List' sidebar on the left.
- 2**: Points to the 'Reset' button below the 'Finder' field.
- 3**: Points to the 'LiveList™' title and search area.
- 4**: Points to the 'Configure' button next to the 'Subject' dropdown.
- 5**: Points to the '40 results found' text above the table.
- 6**: Points to the 'Page 1 of 2' pagination controls.
- 7**: Points to the first row of the data table.

Protocol/Project Number	Title	PI	Status	Service Area
TEMP-HE2021-0384	BW test 2	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0382	CE - My New Protocol 2021	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0378	Proxy Test	Courtney Edworthy	Under Development	Human Ethics
TEMP-HE2021-0361	AB new test	Vamshi Vaddiraja	PI Review	Human Ethics
TEMP-HE2021-0322	CE - TEST	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0317	CE - Sprint 5 - New Test	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0295	A title of some sort	RAS Researcher	Under Development	Human Ethics
HE2021-0048	test	RAS Researcher	Admin Review	Human Ethics
HE2021-0047	CE - SBRC	RAS Researcher	Admin Review	Human Ethics
HE2021-0046	BW Test	RAS Researcher	Admin Review	Human Ethics
HE2021-0044	test-Proxy->PI->HEO -> PI - confirm sent back to PI reassigned to Proxy (Kevin Teasdale) and confirm that a review task is sent to PI again - Defect - no submit button appears	RAS Researcher	Admin Review	Human Ethics
HE2021-0043	Test-student PI->advisor->HEO->student PI - confirm the flow goes to the advisor again	Kevin Teasdale	Admin Review	Human Ethics

- Finder** – The Finder is a single field that allows the user to search for records.
- Reset** – The Reset function clears any sorts and filters previously set.
- Subject** – The Subject drop down provides the user access to additional information based upon security privileges. This view defaults to the Cases list.
- Configure** – The Configure function allows the user to define the Information columns to be displayed.
- Results** – Displays the number of records returned.
- Pagination** – Provides navigational control when the number of records returned exceeds the display limit on the page.
- Information** – Displays information from the records. The columns displayed are controlled by using the Configure function.



The screenshot shows the LiveList™ interface with the following callouts:

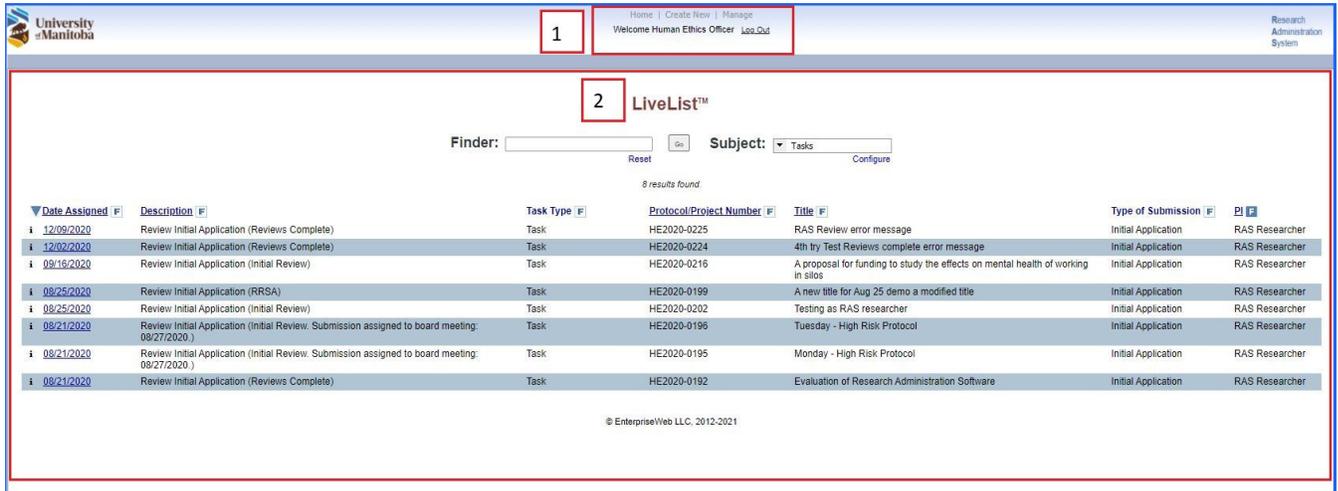
- 1**: Points to the 'Finder' input field.
- 2**: Points to the 'Reset' button.
- 3**: Points to the 'LiveList™' title.
- 4**: Points to the 'Configure' button.
- 5**: Points to the '40 results found' text.
- 6**: Points to the 'Page 1 of 2' pagination controls.
- 7**: Points to the first row of the data table.

Protocol/Project Number	Title	PI	Status	Service Area
TEMP-HE2021-0384	BW test 2	RAS Researcher	Under Development	Human Ethics
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TEMP-HE2021-0361	AB new test	Vamshi Vaddiraja	PI Review	Human Ethics
TEMP-HE2021-0322	CE - TEST	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0317	CE - Sprint 5 - New Test	RAS Researcher	Under Development	Human Ethics
TEMP-HE2021-0295	A title of some sort	RAS Researcher	Under Development	Human Ethics
HE2021-0048	test	RAS Researcher	Admin Review	Human Ethics
HE2021-0047	CE - SBRC	RAS Researcher	Admin Review	Human Ethics
HE2021-0046	BW Test	RAS Researcher	Admin Review	Human Ethics
HE2021-0044	test-Proxy->PI->HEO -> PI - confirm sent back to PI reassigned to Proxy (Kevin Teasdale) and confirm that a review task is sent to PI again - Defect - no submit button appears	RAS Researcher	Admin Review	Human Ethics
HE2021-0043	Test-student PI->advisor->HEO->student PI - confirm the flow goes to the advisor again	Kevin Teasdale	Admin Review	Human Ethics

Integrated Tasks List View

There are two sections to take note of when you login to the system.

1. **Menu Bar** – The Menu Bar provides access to major functions of the system based upon the role(s) assigned to the user. This area also displays the name of the logged in user and provides the function to log out of the system.
2. **LiveList** – This displays all Protocols & Projects where you have View, Edit or Signature access functionality.



1

2

LiveList™

Finder: Subject:

0 results found

Date Assigned	Description	Task Type	Protocol/Project Number	Title	Type of Submission	PI
12/09/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0225	RAS Review error message	Initial Application	RAS Researcher
12/02/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0224	4th try Test Reviews complete error message	Initial Application	RAS Researcher
09/16/2020	Review Initial Application (Initial Review)	Task	HE2020-0216	A proposal for funding to study the effects on mental health of working in silos	Initial Application	RAS Researcher
08/25/2020	Review Initial Application (RRSA)	Task	HE2020-0199	A new title for Aug 25 demo a modified title	Initial Application	RAS Researcher
08/25/2020	Review Initial Application (Initial Review)	Task	HE2020-0202	Testing as RAS researcher	Initial Application	RAS Researcher
09/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting: 09/27/2020.)	Task	HE2020-0196	Tuesday - High Risk Protocol	Initial Application	RAS Researcher
09/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting: 09/27/2020.)	Task	HE2020-0195	Monday - High Risk Protocol	Initial Application	RAS Researcher
08/21/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0192	Evaluation of Research Administration Software	Initial Application	RAS Researcher

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1. **Finder** – The Finder is a single field that allows the user to search for records.
2. **Reset** – The Reset function clears any sorts and filters previously set.
3. **Subject** – The Subject drop down provides the user access to additional information based upon security privileges. This view defaults to the Tasks list.
4. **Configure** – The Configure function allows the user to define the Information columns to be displayed.
5. **Results** – Displays the number of records returned.
6. **Pagination** – Provides navigational control when the number of records returned exceeds the display limit on the page.
7. **Information** – Displays information from the records. The columns displayed are controlled by using the Configure function.



1

2

3

4

5

6

7

LiveList™

Finder: Subject:

0 results found
|<< << Page 1 of 2 >> >>|

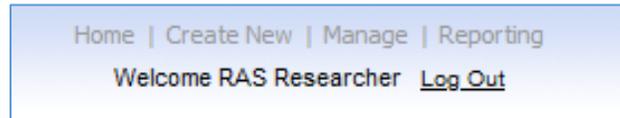
Date Assigned	Description	Task Type	Protocol/Project Number	Type of Submission	PI
12/09/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0225	Initial Application	RAS Researcher
12/02/2020	Review Initial Application (Reviews Complete)	Task	HE2020-0224	Initial Application	RAS Researcher
09/16/2020	Review Initial Application (Initial Review)	Task	HE2020-0216	Initial Application	RAS Researcher
08/25/2020	Review Initial Application (RRSA)	Task	HE2020-0199	Initial Application	RAS Researcher
08/25/2020	Review Initial Application (Initial Review)	Task	HE2020-0202	Initial Application	RAS Researcher

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Navigation

Menu Bar

The Menu Bar provides access to major functions of the system based upon the role(s) assigned to the user. This area also displays the name of the logged in user and provides the function to log out of the system.



- **Home:** The Home button is used to bring you back to the LiveList page. This button should always be used instead of the Back button on your Browser.
- **Create New:** Use the Create New button to create a new Human Ethics Protocol, Animal Use Protocol or Proposal.
- **Manage:** Under Manage you will find User Profile settings as well as management of notifications and ethics boards. What you see is dependent on your role/security privileges.

LiveList

The LiveList displays all Protocols & Projects where you have View, Edit or Signature access functionality. Here you will see two main fields: **Finder** and **Subject**. These fields will be used to find and filter records.

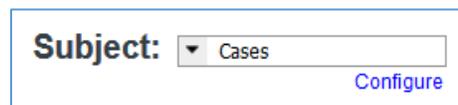
Finder

The Finder field is used to search for items within the specified Subject that is selected.



Subject

The Subject drop down contains different lists depending on the user's role/security privileges. The Subject specifies the items you are searching for when using the Finder.



All users will see:

- **Cases:** Cases are accessible to all users and includes a list of all protocols and projects that the user has either reviewed or is a member of the research team.
- **Reference Materials:** Reference materials refers to checklists, SOPs, guidance documents or other reference material.

Some users will have view-only access to protocols:

- **View Human Ethics Cases:** Use this subject to view all Human Ethics cases.

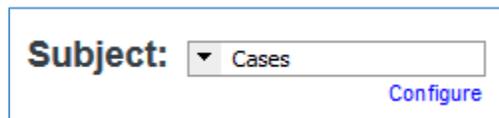
Configuring the LiveList Columns

Each Subject within the drop down has a definable list of columns to be displayed within the LiveList. Each Subject item is configured independently. The settings made are stored and used each time the page is opened, meaning you will only have to make this change once and it's saved for the next time you login.

For example: **Cases** Subject list includes these available fields

To configure the columns displayed on the LiveList page:

1. Select the appropriate Subject item from the drop down, click **Configure**



A screenshot of a web interface showing a dropdown menu for 'Subject'. The dropdown is currently set to 'Cases'. To the right of the dropdown is a blue button labeled 'Configure'.

2. Here you can set the number of **Records Per Page**



A screenshot of a 'View Options' dialog box. At the top, there is a 'Records Per Page' field with the value '50'. Below this is a section titled 'Visible Fields:' containing a list of checkboxes. The following fields are checked: Protocol/Project Number, Title, PI, Status, Research Personnel, and External Personnel. The following fields are unchecked: Department, Deadline Date, Original Approval Date, Proposal/Approval Start Date, Proposal/Approval End Date, Requested Total, Involves Biosafety, Contract Activity Status, Sponsor, Species, Motion, Full Board, Coordinator/Officer, Review Board, and Service Area. At the bottom of the dialog is an 'Update' button.

3. Check the box next to each column you would like to appear on the LiveList

Note: There is a max. of 14 columns that can be shown at a time.

4. Click **Update** to save and close

Sorting LiveList Columns

Each column in the LiveList allows you to sort ascending or descending.

To sort the columns displayed on the LiveList page

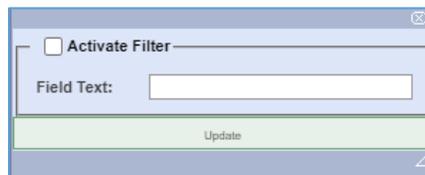
1. Click on the column name, a ▼ will appear to the left of the column name to indicate this column is being sorted ascendingly
2. Click the same column again to sort descending, a ▲ will appear to indicate descending

Applying LiveList Filters

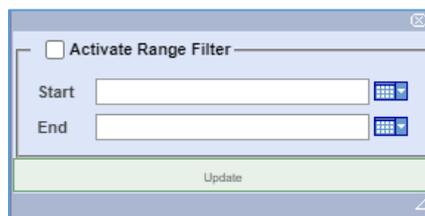
The columns on the LiveList allow you to apply a filter to assist in locating records. There are three types of filters available: text, date, and value. Multiple filters may be set concurrently to further reduce the number of records returned.

Filter Types:

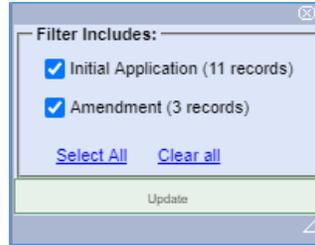
1. **Text** – Provides a filter based upon text contained within the field.



- a. Protocol Number
 - b. Protocol Title
 - c. PI
2. **Dates** – Provides filtering based upon a date range.



- a. Approval Start Date
 - b. Approval End Date
3. **List of Values** – Provides filtering based upon a defined list of values that exist for the field.



- a. Department
- b. Status
- c. Type

To apply a Filter:

1. From the LiveList page
2. **Right click** on the  icon for the desired column to view filter options
3. Do one or more of the following:
 - a. Enter text in the **Field Text** field provided
 - b. Enter **Start** and **End date**
 - c. Select one or many desired values from list provided for the field
4. Check the **Activate Filter** where appropriate
5. Click **Update** to apply the filter

To remove a Filter:

1. From the LiveList page
2. **Right click** on the  icon for the desired column to view filter options
3. Depending on the type of filter either:
 - a. Uncheck Activate Filter if applicable
 - b. Uncheck/check any values from the list
4. Click **Update**

Find & Open a Protocol

To find and open an Existing Protocol:

1. From the LiveList page, select **Cases** from the Subject drop down
2. Click within the **Finder** textbox
3. Enter one of the following:
 - a. Protocol Number

Note: For searching migrated protocol numbers with colons or brackets, the wildcard (*) is required for searching. This means that you cannot copy and paste the full migrated protocol number "HS12345 (P2000:123)" into the finder.
 - i. to search for P2000:123, type ***P2000*123**
 - ii. to search the HS number, type **HS12345**
 - b. PI First and/or Last Name
 - c. Partial string from the Title

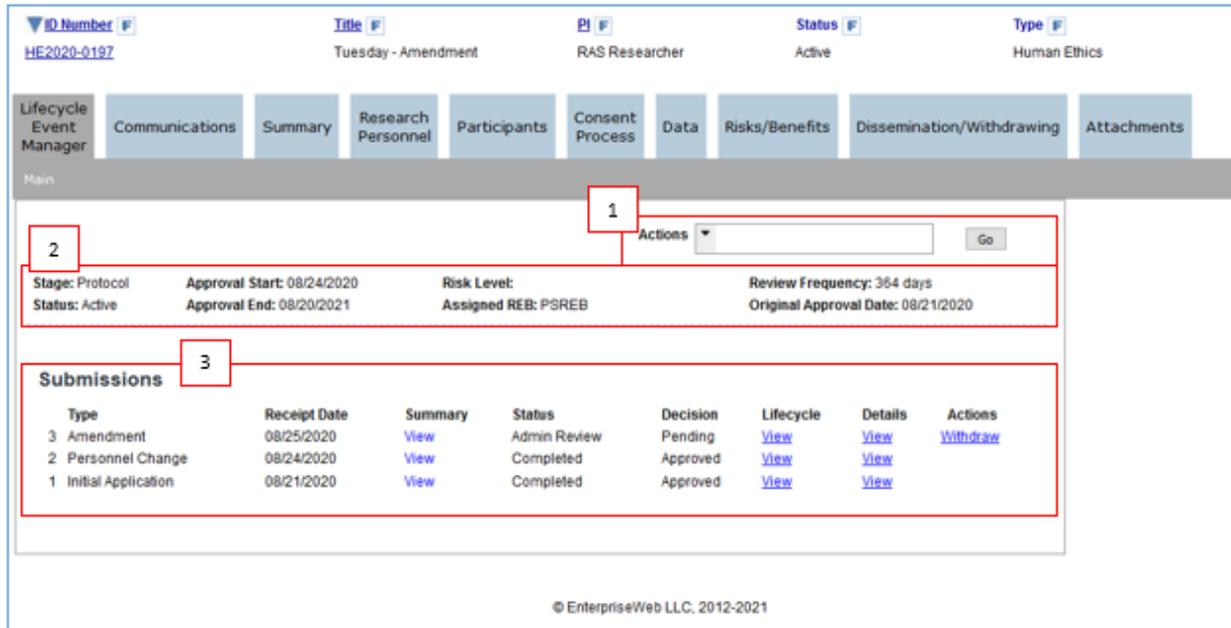
4. Click **Go**, the LiveList will now filter based on the entered criteria
5. Click on the **Protocol Number** link to open the protocol
6. To go back to the LiveList click on the **Protocol Number** link again, do not use the Back button on your browser

Lifecycle Event Manager

The Lifecycle Event Manager contains summary information about the research protocol, submission history information, and any actions available to the logged in user.

Lifecycle Event Manager: This tab allows the user to view the status for each submission for the selected protocol.

1. **Actions:** This drop down is used to create new submissions for the selected protocol.
2. **Status:** This section shows the current status of the selected protocol.
3. **Submissions:** This section allows the user to view each individual submission or withdraw the submission if it hasn't been approved yet.



HE2020-0197 Tuesday - Amendment RAS Researcher Active Human Ethics

Lifecycle Event Manager Communications Summary Research Personnel Participants Consent Process Data Risks/Benefits Dissemination/Withdrawing Attachments

Main

1 Actions Go

2 Stage: Protocol Approval Start: 08/24/2020 Risk Level: Review Frequency: 364 days
 Status: Active Approval End: 08/20/2021 Assigned REB: PSREB Original Approval Date: 08/21/2020

3 Submissions

Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
3 Amendment	08/25/2020	View	Admin Review	Pending	View	View	Withdraw
2 Personnel Change	08/24/2020	View	Completed	Approved	View	View	
1 Initial Application	08/21/2020	View	Completed	Approved	View	View	

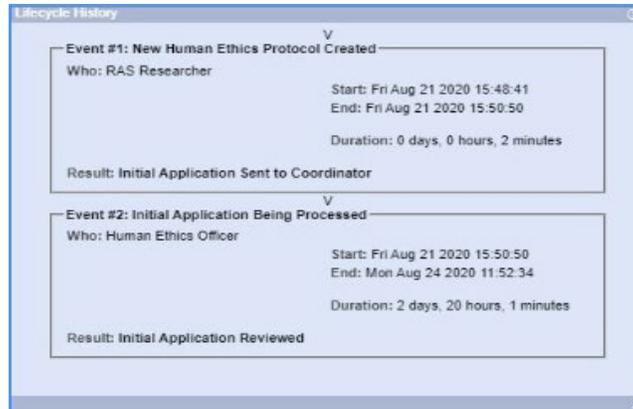
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Lifecycle History

The Lifecycle History view shows the history of the submission.

To view the Lifecycle history

1. Click the **View** link under the **Lifecycle** column, window opens
2. All events are listed in chronological order



Migrated Protocols Lifecycle History

When viewing the lifecycle history of a migrated protocol you will see the approval dates.

*To learn more about Migrated Protocols see the Migrated Protocol section in the Human Ethics Submission Training Document.



Print a Submission

The system allows you to print each individual submission and download all attachments.

To print a submission

1. Click the **View** link under the **Details** column, window opens
2. Click the **Print** link at the top of the window, this will print the current version
3. Click  under **Download PDF** within each version of the **Review Dashboard** to view/print that version that was submitted to the Office of Human Research Ethics

Note: If you get a message that the page is not responding, please click 'Wait' and page will continue to load. If no window appears, please ensure your pop-up blocker is disabled.

To download attachments

1. Click the **View** link under the **Details** column, window opens
2. Click the **ZIP Attachments** link at the top right-hand side of the window
3. This will download all attachments for this submission in a ZIP folder on your computer

Protocol: HE2023-0142 **Submission Type: Initial Application**

[Print](#) [ZIP Attachments](#)

Review Dashboard Summary Research Personnel Participants Consent Process Data Deception Risks/Benefits Dissemination/Withdrawing Indigenous Peoples Attachments

Version 1

Date	Duration	Type	Process	Board	Decision	Download PDF
6/1/2023	0 days, 0 hrs, 20 mins	Analyst	Administrative		Returned to PI	
6/1/2023	0 days, 0 hrs, 3 mins	Research Team	Revision		Status = Complete	

Version 2

Date	Duration	Type	Process	Board	Decision	Download PDF
6/3/2023	0 days, 23 hrs, 10 mins	Analyst	Administrative		Setup Review	
6/3/2023	2 days, 18 hrs, 32 mins	Chair Review	Chair - Provide Review	REB1	Modifications Required	
6/6/2023	0 days, 0 hrs, 30 mins	Research Team	Revision		Status = Complete Examine Modifications Required	

Withdraw Submission

- Under the Lifecycle Event Manager tab, select **Withdraw** under actions
Note: This function is only meant to be used if you no longer wish to submit. Once withdrawn you cannot re-submit to the Office of Human Research Ethics. You can only withdraw a submission after it has been submitted but prior to approval.

Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
3 Amendment	08/25/2020	View	Admin Review	Pending	View	View	Withdraw
2 Personnel Change	08/24/2020	View	Completed	Approved	View	View	
1 Initial Application	08/21/2020	View	Completed	Approved	View	View	

Delete Task/Submission

- Under the Lifecycle Event Manager tab, select **Delete** under actions
Note: You can only delete prior to submission to the board.

Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
2 Personnel Change		View	In Development	Pending	View	View	Delete Reassign Task
1 Initial Application	06/15/2023	View	Completed	Approved	View	View	

Reassign Task/Submission

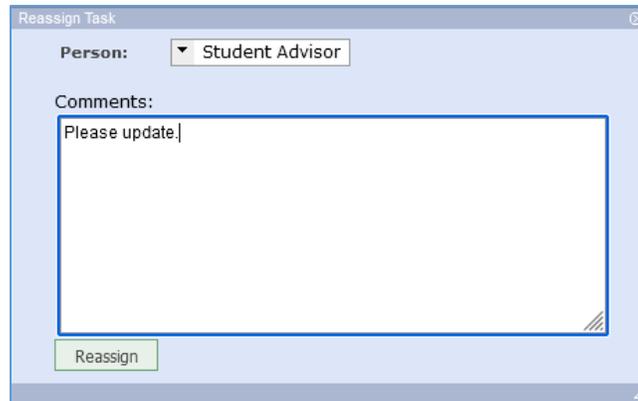
A submission can be reassigned to any research member with **edit access**. Once reassigned, the submission can then be submitted back to the PI or reassigned to another research member with **edit access**.

- Under the Lifecycle Event Manager tab, select **Reassign Task** under actions
Note: You can only reassign task prior to submission to the board.

Submissions

Type	Receipt Date	Summary	Status	Decision	Lifecycle	Details	Actions
2 Personnel Change		View	In Development	Pending	View	View	Delete Reassign Task
1 Initial Application	06/15/2023	View	Completed	Approved	View	View	

2. Select the research member in the **Person** drop down list
 3. Add any instructions to the **Comments** text area, optional
- Note:** These notes will appear in the Lifecycle History view for all to view



Reassign Task

Person:

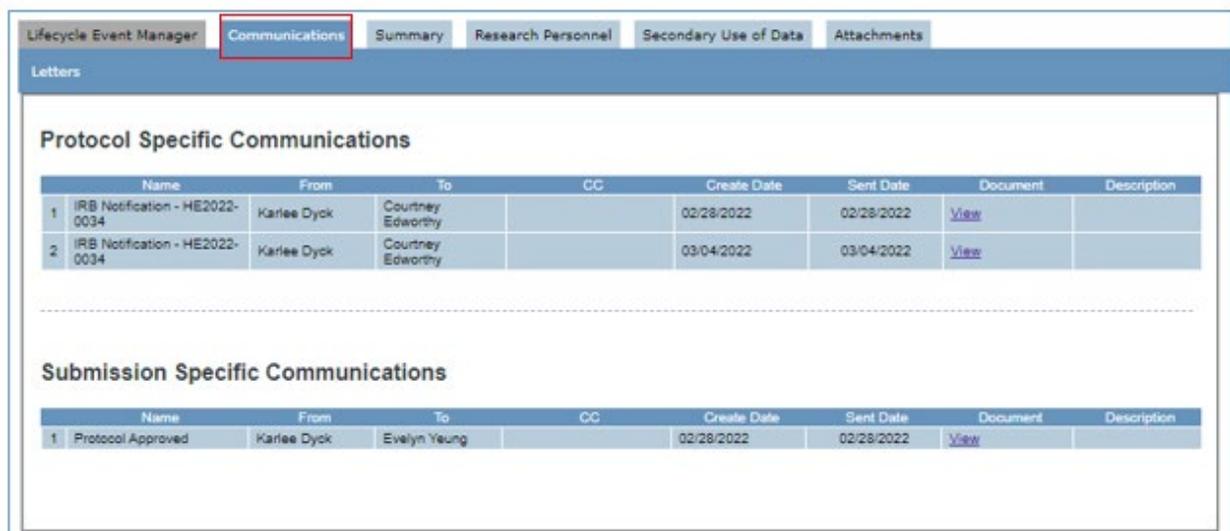
Comments:

Please update.

Reassign

4. Click **Reassign**, then **OK**
5. Task is now reassigned and will be in this research members To Do List.

Communications: Provides access to notifications and/or letters that have been sent out by the OHRE office.



LifeCycle Event Manager **Communications** Summary Research Personnel Secondary Use of Data Attachments

Letters

Protocol Specific Communications

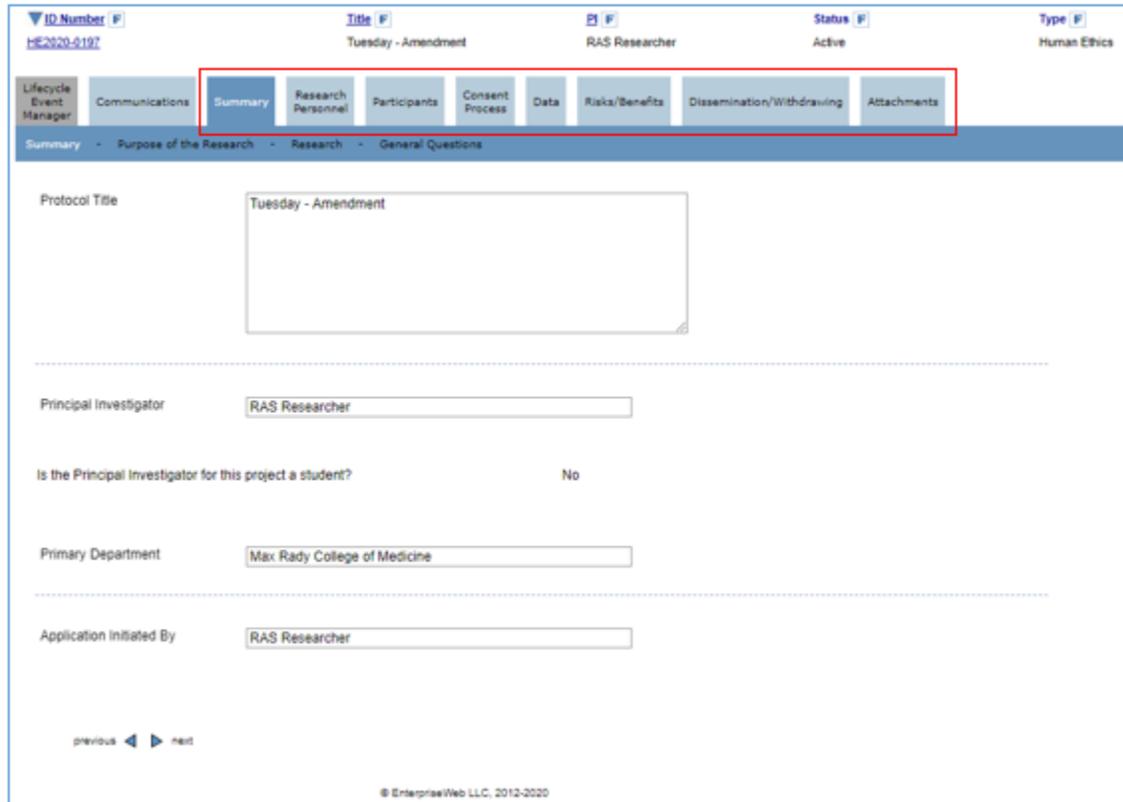
	Name	From	To	CC	Create Date	Sent Date	Document	Description
1	IRB Notification - HE2022-0034	Karlee Dyck	Courtney Edworthy		02/28/2022	02/28/2022	View	
2	IRB Notification - HE2022-0034	Karlee Dyck	Courtney Edworthy		03/04/2022	03/04/2022	View	

Submission Specific Communications

	Name	From	To	CC	Create Date	Sent Date	Document	Description
1	Protocol Approved	Karlee Dyck	Evelyn Yeung		02/28/2022	02/28/2022	View	

Protocol Information: The other tabs in this section show all the currently approved information for the currently selected protocol. Click through each tab to view additional information. The Attachments tab

also allows you to download any attachments (i.e. Consent Documents) that have been approved on this protocol.



▼ ID Number Title Status Type

Lifecycle Event Manager Communications **Summary** Research Personnel Participants Consent Process Data Risks/Benefits Dissemination/Withdrawing Attachments

Summary - Purpose of the Research - Research - General Questions

Protocol Title

Principal Investigator

Is the Principal Investigator for this project a student?

Primary Department

Application Initiated By

previous ◀ ▶ next

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Notifications

There are two types of notifications:

1. [Tasks](#)
 - a. You can see these in the **To Do List** or under **Tasks** in the Subject drop down i.e. protocol expiry, amendment to be done, something to be signed, REB agenda
2. [Emails](#)
 - a. These are sent to you when something is triggered in the system i.e. protocol approval, protocol revisions, review requested etc.

Tasks

To Do List

In the To Do List all tasks, communications, and notifications are listed here.



The screenshot shows the 'LiveList' interface. On the left is a 'To Do List' sidebar with several items, including 'HE320-6307 (Researcher RAS) - Create REB Event - NEW Nov 9 Protocol' and 'HE320-6307 (Researcher RAS) - Create Personal Change - NEW Nov 9 Protocol'. The main area displays a table of tasks with columns for Protocol/Project Number, Title, PI, Status, and Service Area. The table contains 13 rows of data, including tasks like 'a sample protocol', 'Unique TR', and 'A protocol Example'.

Protocol/Project Number	Title	PI	Status	Service Area
HE320-6307-0101	a sample protocol	RA3 Researcher	Under Development	Human Ethics
HE320-6307-0102	Unique TR	RA3 Researcher	Under Development	Human Ethics
HE320-6307-0103	High	RA3 Researcher	Under Development	Human Ethics
HE320-6307-0104	A protocol Example	JOHAN C DORRHO	Under Development	Human Ethics
HE320-6307-0105	A protocol the 2	RA3 Researcher	Admin Review	Human Ethics
HE320-6307-0106	A protocol the	RA3 Researcher	Admin Review	Human Ethics
HE320-6307-0107	December - TEST	RA3 Researcher	Under Review	Human Ethics
HE320-6307-0108	Nov 25 - Referred	RA3 Researcher	Admin Review	Human Ethics
HE320-6307-0109	Nov 25 - Protocol	RA3 Researcher	Not Approved	Human Ethics
HE320-6307-0110	HE320 Nov 9 Protocol	RA3 Researcher	Active	Human Ethics
HE320-6307-0111	Testing as RA3 researcher	RA3 Researcher	Admin Review	Human Ethics
HE320-6307-0112	A new IRB for Aug 25 items a modified title	RA3 Researcher	Admin Review	Human Ethics
HE320-6307-0113	A new study (Monday)	RA3 Researcher	Active	Human Ethics
HE320-6307-0114	Tuesday - Amendment	RA3 Researcher	Active	Human Ethics
HE320-6307-0115	Tuesday - High Risk Protocol	RA3 Researcher	Under Review	Human Ethics
HE320-6307-0116	Monday - Amendment	RA3 Researcher	Active	Human Ethics
HE320-6307-0117	Study at the Effect Working From Home has had on Employee Productivity	RA3 Researcher	Active	Human Ethics
HE320-6307-0118	Evaluation of Research Administration Software	RA3 Researcher	Under Review	Human Ethics

Who gets the task:

- **PI:** receives all submission related tasks i.e. Revise Application, Correct Errors, PI Sign-Off etc.
 - o The one exception would be if a Designate is submitting the protocol, the PI would receive the tasks prior to submission i.e. Complete Initial Application
- **Reviewers/Chair:** receives all review and board related tasks i.e. Complete Review, View Agenda etc.

As you can see in the below screenshot there are 3 tasks listed. The first is a Revise Initial Application task, then we have a Correct Errors task (as you can see this is a TEMP protocol meaning it has not been submitted to the OHRE yet). The last task is a Complete the Personnel Change form task, this task means you have started a Personnel Amendment form for this protocol but have not submitted it yet to the OHRE.

Note: You cannot complete a task by opening the protocol from the LiveList, you must complete by clicking on it within the To Do List.

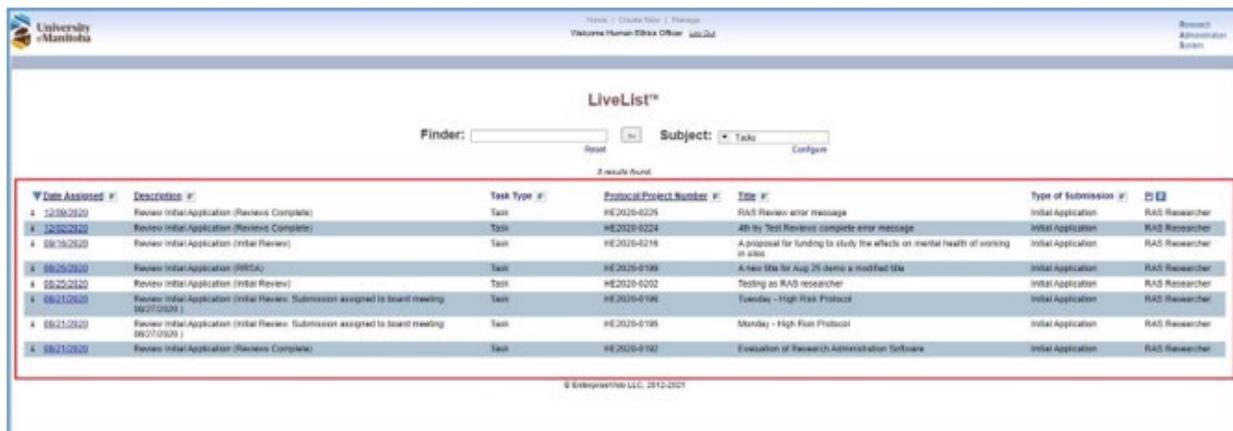
To Do List

- ☰
📄
HE2020-0198 (Researcher, RAS) - Revise Initial Application - A new study (Monday) - (Date Assigned: 01/29/2021) RRSA
[Revise Initial Application](#)
- ☰
★
TEMP-HE2021-0295 - Create Human Ethics Protocol
[Correct Errors - Initial Application](#)
- ☰
📄
HE2020-0214 (Researcher, RAS) - Create Personnel Change - JH - Migrated Protocol Test
[Complete the Personnel Change](#)

There are many different types of tasks you will see listed here along with these which can include: Review REB Agenda, New Protocol for Review, Protocol Expiry, and any Protocol Approval notifications.

[Integrated List](#)

To view tasks, go to the Tasks drop down item under Subject.



Date Assigned #	Description #	Task Type #	Protocol/Project Number #	Title #	Type of Submission #
12/08/2020	Review Initial Application (Review Complete)	Task	HE2020-0205	RAS Review error message	Initial Application RAS Researcher
12/08/2020	Review Initial Application (Review Complete)	Task	HE2020-0224	4th By Test Reviewer complete error message	Initial Application RAS Researcher
08/18/2020	Review Initial Application (Initial Review)	Task	HE2020-0216	A proposal for funding to study the effects on mental health of working in a lab	Initial Application RAS Researcher
08/25/2020	Review Initial Application (RRSA)	Task	HE2020-0198	A new title for Aug 25 demo a modified title	Initial Application RAS Researcher
08/25/2020	Review Initial Application (Initial Review)	Task	HE2020-0202	Testing as RAS researcher	Initial Application RAS Researcher
08/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting 08/21/2020)	Task	HE2020-0196	Tuesday - High Risk Protocol	Initial Application RAS Researcher
08/21/2020	Review Initial Application (Initial Review: Submission assigned to board meeting 08/21/2020)	Task	HE2020-0198	Monday - High Risk Protocol	Initial Application RAS Researcher
08/21/2020	Review Initial Application (Review Complete)	Task	HE2020-0193	Evaluation of Research Administration Software	Initial Application RAS Researcher

Subject: ▼ Tasks [Configure](#)

Any task that is assigned to you will be listed here. In this view you can also sort and filter the list.

See [Configuring the LiveList Columns](#) for more information.

Reassigning a Task

A task assigned to you can be reassigned to any one on the protocol that has edit access or signing authority. These tasks include completing a protocol or follow-on submission.

When a submission is sent back from the OHRE for revisions the task is always sent back to the PI. If the protocol has a Study Coordinator and/or Co-PI (or other role) listed on the protocol that has edit access or signing authority for that protocol they can reassign the task to themselves to complete, if needed.

See Delete or Reassign Task section under the [Lifecycle Event Manager](#).

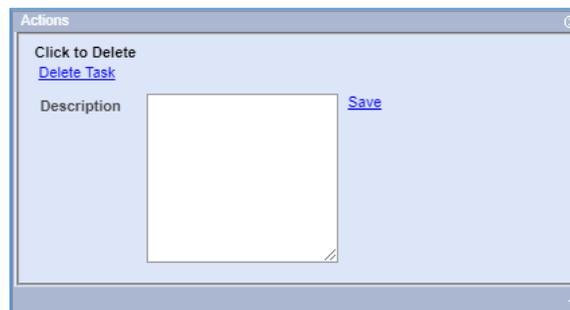
Removing a Notification

Done by reassigning, completing, or deleting (communications/notifications).

To delete a notification i.e. Review REB Agenda, Protocol Approval etc.

1. Open the task
2. Click the **Delete** button

In the Integrated Task List view, you can right click on the task from the list and click **Delete Task**.



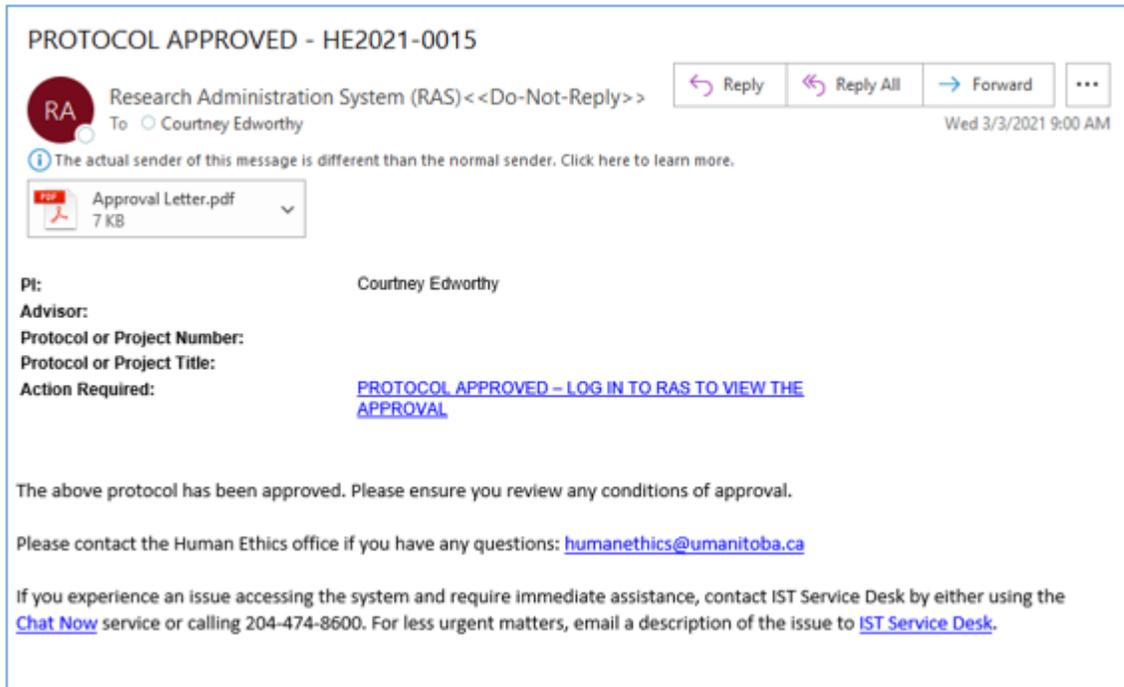
Note: Only communications and notifications can be deleted this way.

Emails

When a task is generated, in most cases, an email notification is also generated and sent to the user.

Types of emails you may receive are: PI Sign Off Required, New Protocol for Review, Protocol Approved or Protocol Closure.

An example of a Protocol Approval email:



When you receive an email, you can click on the Action Required link and it will take you directly to task you need to complete.

Important: Anyone who is cc'd on a protocol will also receive these email notifications. Its important to remember that only the PI receives the task in the system, meaning the Action Required link will only works for the PI. This is important to note in the event of a "Revise Protocol" email, where there may be a Study Coordinator cc'd. They will need to log into the system and reassign the task if they wish to complete it for the PI.

Managing your User Profile

To Edit the User Profile

1. From the Menu Bar select Manage > My User Profile



2. The User Profile includes 6 tabs:
 - a. Profile
 - b. Contact Info
 - c. Education
 - d. Appointments
 - e. Experience
 - f. Certifications

Important

For UM staff, some fields of your user profile are **non-editable** that are located in the following tabs:

- Profile
- Contact Info
- Appointments

If you need to make changes/updates to information in these tabs:

- Please access your profile page in the Employee Self-Service (ESS) section of VIP (<https://vip.umanitoba.ca/>) where you can make changes
- Please allow 24 hours for the change to be reflected in your Ideate Profile

Remember: If your change is regarding your job title or classification you must contact HR directly at hris@umanitoba.ca

Profile

Here is where you can view/edit your user profile.

My User Profile

Profile
Contact Info
Education
Appointments
Experience
Certifications

Legal Name: RAS Researcher

Preferred Name:

Salutation (Optional):

Department(s): Medical Microbiology and Infectious Diseases, Business Administration

Interests: [Add](#)

ORCID:

CV: [Attach](#)

Some fields of your RAS user profile are **non-editable** that are located in the following tabs:

- . Profile
- . Contact Info
- . Appointments

If you need to make changes/updates to these fields:

- . Please access your profile page in the Employee Self Service section (ESS) of VIP ([Link](#)) where you can make changes.
- . Please allow **24 hours** for the change to be reflected in your RAS profile.

IMPORTANT:

If your change is regarding your **job title** or **classification** you must contact HR directly at hris@umanitoba.ca.

Notice Regarding Collection, Use, and Disclosure of Personal Information by the University

Your personal information is being collected under the authority of The University of Manitoba Act. The information you provide will be used by the University for the purpose of registering and tracking your REB Protocol submission. Your personal information may be disclosed to external members of REB committees for the protocol review. Your personal information will not be used or disclosed for other purposes, unless permitted by The Freedom of Information and Protection of Privacy Act (FIPPA). If you have any questions about the collection of your personal information, contact the Access & Privacy Office (tel. 204-474-9462), 233 Elizabeth Dafoe Library, University of Manitoba, Winnipeg, MB, R3T 2N2.

1. **Legal Name:** The legal name is imported from the UM VIP system; this field cannot be edited.
2. **Preferred Name:** Enter your preferred name here. This will display throughout the entire system.
 - a. **Note:** Your legal name will be displayed on all ethics related Approval Letters
3. **Salutation:** Enter your salutation (optional).
4. **Department(s):** Department(s) are imported from the UM VIP system.
5. **Interests:** This field is not in use currently.
6. **ORCID:** Add in your ORCID here (optional). Please note this field does not link to any external system.
7. **CV:** Upload your CV here (optional).

Contact Info

Under Contact Info you can add phone numbers, additional emails and addresses.

My User Profile

ProfileContact InfoEducationAppointmentsExperienceCertifications

Phone Numbers

1 **Work:**

Cell:

Email Addresses

NOTE: Notifications will go to all email addresses entered in this section

2 **Address 1:**

[Add New Email](#)

Contact Locations

Address Type

Address 1

Address 2

3 **Address 3**

City

Postal Code/Zip Code

Country

State/Province:

[Add New Address](#)

1. **Phone Numbers:** Enter in your **Work** and/or **Cell** contact phone numbers.
2. **Email Addresses:** Your UofM email address will be the default address listed. However, in the event you have a separate email you also use you can add that here by clicking **Add New Email**. All emails/notifications will be sent to all emails listed.
Important: You can only login to the system with your UM email
3. **Contact Locations:** Enter in your work/office address (optional).

Education

This section is not in use.

Appointments

Appointment information will be automatically populated through an interface with the UM VIP system. If any information here is incorrect, you will need to contact Human Resources.

Experience

This section is not in use.

Certifications

CORE certification is required for all research personnel submitting a Human Ethics protocol. PHIA certificate is only required for PIs and Advisors where PHIA is required for their Human Ethics protocol.

Note: All users must upload their own certificates to their profile prior to the submission of any Human Ethics protocols they are listed on.

My User Profile

ProfileContact InfoEducationAppointmentsExperienceCertifications

Certification	Training Provider	Training Date	Pledge
CORE	TCPS	01/01/2021	View
PHIA	UM	01/01/2021	View

Add Certifications

1. Click Manage > User Profile under the main menu
2. Click on the **Certifications** tab
3. Click on **Add Certification**
4. Enter data as follows:
 - a. **Training Provider:** Type in who provided the training i.e. TCPS-2
 - b. **Attach Pledge:** Click Attach Pledge > Choose File, find the file then and click Upload (Please ensure there are no characters in the file name).
 - c. **Training Date:** Enter in the certification date
 - d. **Lookup Certification:** Select the corresponding Certification from the list i.e. CORE

Add Certification ✖

Training Provider:

[Attach Pledge](#)

Training Date:

Lookup Certification: [Go](#)

Name	ID
CORE	42
PHIA	43

See video [“How to upload CORE and PHIA Certificates”](#) for more help.

CORE, PHIA & Oath of Confidentiality

Research members are required to upload CORE, PHIA, and an Oath of Confidentiality in certain circumstances. Below is a quick reference table on when each document is required and for which research member on the protocol.

Certification	Protocols required for	Roles required for	Require prior to	Where to upload in RAS
CORE	All Protocols	All Research Personnel	Submission	User Profile
PHIA	Protocols where PHIA is required	PI and Advisor	Submission	User Profile
PHIA	Protocols where PHIA is required	All Research Personnel except the PI and Advisor	Approval	User Profile
Oath of Confidentiality	All Protocols	All Research Personnel except the PI and Advisor	Approval	Research Personnel tab in the Protocol