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1 OVERVIEW

The Committee Manager and RCA Role Manual is for any user whose role in eProtocol is either the Committee Manager or the Research Compliance Administrator (RCA). In this manual, users will be shown examples of dashboards, steps in managing protocols and descriptions of job functionality, duties, and role requirements. If your role is a Committee Manager, please see pages 7-9, 36 and 37. If your Role is a RCA, please see pages 10-37.

1.1 Things to Remember

Before getting started on the Committee Manager and RCA Role Manual, please review the information from the General Functionality and Dashboard Manual.

1. Choose a supported browser
   Using an unsupported browser will cause the software to not work properly; limiting the users full functionality. The browsers compatible with eProtocol are: Internet Explorer 10 and above, Firefox 12 and above, and Safari 7.

2. Make sure the Pop-Up Blocker is turned OFF
   The steps in the Committee and RCA Role Manual cannot be completed if the pop-up blocker is still active. See the General Functionality & Dashboard Manual for more information and instructions.

3. Avoid using the Back button
   Using the Back button will cause errors in the system and logout the user.

4. Resizing the screens
   There are numerous pop-up windows used in the software. Don’t forget to resize the screens to better suit your view.

**NOTE:** For the purpose of this manual, IACUC is used as an example. Based on your research discipline, some options may vary.
2.1 Committee Manager Role Overview

The Committee Manager and RCA Role Manual examines the functions, job duties and requirements of each role. If your role is a Committee Manager, please see pages 7-9, 36 and 37 as they display screen shots, examples of the dashboard and step-by-step instructions on how to manage a protocol.

2.2 Assigning a Protocol to a Panel

Under the eProtocol drop-down, select Committee Manager to access the Committee Manager home dashboard. Once on the dashboard, you may begin assigning protocols by following the steps below [Figure 2.1].

1. Check the box next to the Protocol ID number you wish to assign a panel to.

2. After selecting the protocol, choose the panel you want the protocol assigned to by selecting from the panel drop-down menu.

3. Once both the protocol and panel have been selected, click the blue Assign Panel action button to complete the process.

**NOTE:** When a protocol has been assigned to a panel, a blue message will appear in the content area, notifying the user the protocol has been assigned.

![Figure 2.1](image-url)
Committee Manager Role

2.3 Assigned Protocols

A Committee Manager can access the list of assigned protocols by clicking the Assigned Protocols tab under the eProtocol drop-down. The user will be directed to a page as shown in Figure 2.2.

<table>
<thead>
<tr>
<th>Protocol ID</th>
<th>Principal Investigator</th>
<th>Title</th>
<th>Assigned Date</th>
<th>Panel Name</th>
<th>Form Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>14-09-092</td>
<td>Investigator, Principal</td>
<td>testing Dept Chair WF</td>
<td>09/09/2014</td>
<td>Pre-Review</td>
<td>NEW</td>
</tr>
<tr>
<td>14-10-133</td>
<td>Investigator, Principal</td>
<td>testing the training required</td>
<td>10/13/2014</td>
<td>IACUC</td>
<td>NEW</td>
</tr>
<tr>
<td>14-09-105</td>
<td>Investigator, Principal</td>
<td>testing CFC training</td>
<td>10/13/2014</td>
<td>Pre-Review</td>
<td>NEw</td>
</tr>
<tr>
<td>14-08-076</td>
<td>Investigator, Principal</td>
<td>testing on August 5th</td>
<td>10/13/2014</td>
<td>Test Panel</td>
<td>NEW</td>
</tr>
</tbody>
</table>

Figure 2.2

2.4 Returning a Protocol with Return Notes

The steps in returning a protocol to the Principal Investigator are similar to that of assigning a protocol, however the Committee Manager must write a note in the protocol giving reason for the return. Follow the steps below to return a protocol back to the Principal Investigator.

1. On the home dashboard, open the protocol you wish to return by clicking on the Protocol ID number. A pop-up will appear asking if you want to edit or view the protocol. Click the Edit button to proceed.

2. The protocol will open in a new window. Click on the Return Notes menu option as seen highlighted below, to generate another pop-up window [Figure 2.3].

3. Enter the reason for return in the Return Notes pop-up, followed by clicking Save.

4. Save and close the protocol and return to the Committee Manager dashboard.

5. Check the box next to the protocol you are returning followed by clicking the Return Protocol action button to complete the process.
2.5 Returned Protocols

A Committee Manager can access the list of returned protocols by clicking the Returned Protocols tab under the top menu bar drop-down. The user will then be directed to a page as seen in Figure 2.4.

Delete Protocol from List

To delete the returned protocol from the returned protocol list, the Committee Manager must select the box next to the protocol ID number they wish to delete, followed by clicking on the Delete Protocol button. A pop-up window will appear asking if the user wants to delete the protocol. Click the Yes button and the returned protocol will be deleted from the list.
3 RCA ROLE

3.1 RCA Role Overview

The Committee Manager and RCA Role Manual examines the functions, job duties and requirements of an eProtocol user logged in as a Committee Manager or Research Compliance Administrator (RCA). This portion of the manual is dedicated to users logging in as a RCA. If your role is a RCA, please see pages 10-37 as they display screen shots, examples of the dashboard and step-by-step instructions on managing a protocol.

3.2 Protocol Event Types

The **Protocol Event** column of the grid displays the status of the protocol. The Protocol Events are further explained on page 11.

<table>
<thead>
<tr>
<th>Protocol Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt of Protocol</td>
</tr>
<tr>
<td>Reviewer(s) Assigned</td>
</tr>
<tr>
<td>Panel Manager Review</td>
</tr>
<tr>
<td>Comments Received (Cycle 1) - Completed</td>
</tr>
<tr>
<td>Comments Sent (Cycle 1)</td>
</tr>
<tr>
<td>Responses Received (Cycle 3)</td>
</tr>
<tr>
<td>Responses Sent (Cycle 3)</td>
</tr>
<tr>
<td>Recommended for Approval</td>
</tr>
<tr>
<td>CONTINGENT</td>
</tr>
<tr>
<td>MOVED</td>
</tr>
<tr>
<td>TABLED</td>
</tr>
</tbody>
</table>

Figure 3.1
1. **Receipt of Protocol** - The RCA must assigns reviewers to a protocol.

2. **Reviewer(s) Assigned** - The protocol has been assigned to Reviewers for revision.

3. **Panel Manager Review** - The protocol is assigned to the Panel Manager for revision.

4. **Comments Received (Cycle X)** - At least one Primary Reviewer assigned for review, sent comments on the protocol.

5. **Comments Sent (Cycle X)** - Comments on the protocol are sent to the Investigator.

6. **Responses Received (Cycle X)** - The Investigator sent responses to the comments from the Reviewers and Panel Manager - informing them of how he/she acted on the comments made on the protocol.

7. **Responses Sent (Cycle X)** - Responses of the Investigator to the comments are sent to Reviewers.

8. **Recommended for Approval** - Reviewers have recommend the protocol for approval.

9. **Contingent** - The protocol is approved on contingent criteria. Contingent Approval is also known as modification required to secure approval.

10. **Moved** - The protocol is moved to another meeting date from the assigned meeting date.

11. **Tabled** - The protocol which is not completely discussed due to some unresolved issues during the meeting has the Tabled status. When the protocol is tabled, the review process should be re-initiated by the committee for further processing.

### 3.3 Polling

Polling allows the RCA to send the protocol off to panel members to get their vote on the review type. To get to this page, click the blue **Review Decision** action button within the grid. This will result in a pop-up containing a list of panel members [Figure 3.2, page 12].

**Assigning and Sending Poll Requests**

1. Select the members you would like to send a poll request to by checking the box next to their name [Figure 3.2].

2. Click the **Send** action button to send the members an email regarding the review decision.
Figure 3.2

After the poll requests have been sent, the RCA see how reviewers voted by clicking the **Review Decision** action button located in the home dashboard. Clicking the button will result in a pop-up like shown in Figure 3.3. It is in this pop-up the RCA is able to view the vote and notes of reviewers.

Figure 3.3
3.4 Assigning Reviewers to a Protocol

As the RCA, you are responsible to assign a reviewer to a protocol. Follow the instructions below to learn how to assign a reviewer.

![Figure 3.4](image)

**Figure 3.4**

How to Select and Assign

1. Click on the Receipt of Protocol link under the “Protocol Events” column on the dashboard. Clicking on the link directs the user to the page shown in Figure 3.4.

2. To assign a presenter, check the box next to the designated user’s name in the Presenter column. Only one presenter can be assigned to a protocol.

3. You may add other reviewers by checking the circles in the same row as their name. Each column represents the users review status. You may also determine the Primary Reviewer (PR) and Secondary Reviewer (SR) by selecting the correct circle of the user you wish to assign.

4. Click on the blue Assign action button to complete this process.
Action Buttons and Functionality

1. The **Panel** drop-down allows the RCA to filter members by the panel they are on.

2. The **Meeting Date** drop-down allows the RCA to filter protocols by their assigned meeting date.

3. The **Review Types** drop-down determines the review type by Panel Manager Review, Designated Review and Full Review.

4. By clicking on the **Write Comment(s)** action button, the RCA can add and view comments within the protocol. Clicking on the action button will direct the user to another page where they may add comments and view other aspects of the protocol.

5. Clicking on the **Cancel** action button will back out to the home dashboard without saving any selections.

6. Clicking the **Assign** action button will assign the selected reviewers to a protocol.
Comments Page Functionality

1. **Get Protocol** - The Get Protocol button activates a pop-up window allowing the user to Edit or View the protocol.

2. **Guidelines** - Clicking on the Guidelines button will result in a pop-up window [Figure 3.7] allowing the user to recommend a guideline. Check the box next to a guideline followed by clicking the Recommend action button.
3 **Reviewers** - The **Reviewers** button allows the RCA to see the reviewers that are assigned to the protocol.

4 **Meeting Minutes** - The **Meeting Minutes** button allows the RCA to view and sequence comments, notes, changing the action status and review the expiration date of the protocol. For further information on the functionality of Meeting Minutes, please see page 27.

5 **Write Comment(s)** - The **Write Comment(s)** button allows the user to navigate to a page like the one shown in Figure 3.8.

   **How to write and save a comment:**

   Write your comment in the text box followed by clicking the **Save** button. Once saved, the option to **Edit** is present.

![Figure 3.8](image)

6 **Edit All Comments** - The **Edit All Comments** button enables editing on all comments in the protocol.

7 **Show All Comments** - The **Show All Comments** button allows the user to view a list of all the comments and notes within the protocol [Figure 3.9].
Submit to PI - The Submit to PI button enables submission to the PI after the comments section has been filled. To do so, follow the steps below.

1. Click the Submit to PI action button to generate a pop-up as seen in Figure 3.10.
2. Select the comments you want to submit, from the “Available Comments” section.
3. Click on the appropriate arrow to transfer the comments to the “Selected Comments” section. Click on the Submit to PI button to complete the process.
Comments Cycle Explanation

Comments Received (Cycle 1) means at least one Primary Reviewer assigned for review sent comments on the protocol. The RCA is responsible for taking the comments and sending them to the Principal Investigator which is also referred to as Comments Sent (Cycle 1).

Responses Received (Cycle 1) appears when the Principal Investigator has responded to the comments written by the Reviewer(s) and/or Panel Manager. The Principal Investigator must then send his/her responses to the comments to the Reviewer(s) which is called Responses Sent (Cycle 1).

Completing those four steps is considered a Cycle. Should the four steps be repeated, the comments will then be in their second cycle and so on. Refer to Figure 3.11 for a visual representation of the comments cycle.

Figure 3.11
3.5 Active Protocols

The RCA can access the list of active protocols by clicking on the Active Protocols tab under the eProtocol drop-down. The RCA will then be directed to the page shown in Figure 3.12.

![Figure 3.12](image)

Close Protocol

To close a protocol, check the circle under the "Decision" column on the grid [Figure 3.12]. A pop-up will appear like the one in Figure 3.13. Fill out a note giving reason for closing the protocol and complete the action by clicking the Confirm action button.

![Figure 3.13](image)
3.6 Non Active Protocols

A user can access the Non Active Protocols page [Figure 3.14] by clicking on the appropriate tab in the top menu bar drop-down. This page displays a list of all the non-active protocols. The RCA can filter through the protocols by using the status drop-down bar.

Checking the circle of a non active protocol under the “Reactivate Protocol” column, will generate a pop-up window where the RCA can reactivate the protocol.

![Figure 3.14](image)

3.7 Submitted Protocols

To access the Submitted Protocols page, go to the top menu bar drop-down and click on the Submitted Protocols tab which will direct the user to a page like the one shown in Figure 3.15. The functionality within the Submitted Protocols page can be found on pages 21 and 22.
Reassign Panel

To reassign a panel follow the directions below:

1. Check the box next to the protocol you would like to reassign reviewers.

2. Click on the blue Reassign Panel action button which will direct you to the page like the one shown in Figure 3.16.

3. Select a panel from the ‘Panel’ drop-down followed by clicking the blue Reassign Panel action button.
Reassign Reviewers

To reassign reviewers, please follow the directions below:

1. Check the box next to the protocol you would like to reassign reviewers [Figure 3.15].

2. Click on the blue Reassign Reviewers action button which will direct you to the page like the one shown in Figure 3.17.

3. Select the reviewers you would like to assign to the protocol to followed by clicking on the Assign action button to complete this process.

![Figure 3.17](image)

3.8 Returned Protocols

To access the Returned Protocols page, go to the top menu bar drop-down and click on the Returned Protocols tab. Clicking on this tab will direct the user to a page listing returned protocols. If there are any protocols to eliminate, check the box of the protocol and click on the Delete action button complete the process [Figure 3.18].

![Figure 3.18](image)
Return a Protocol

The steps in returning a protocol are similar to that of assigning a protocol, however the RCA must write a Return Note in the protocol giving reason for the return. Follow the steps below to return a protocol back to the Principal Investigator.

1. Open the protocol you wish to return by clicking on the protocol ID number. A pop-up will appear asking if you want to edit or view the protocol. Click the ‘edit’ button to proceed.

2. The protocol will open in a new window. Click on the Return Notes tab shown highlighted below, to generate another pop-up window [Figure 3.19].

3. Enter the reason for return in the Return Notes pop-up, followed by clicking the Save action button and closing the protocol.


5. Check the box next to the protocol you are returning followed by clicking on the Return Protocol action button to complete the process.

**NOTE:** You cannot return a protocol if the review is still in progress.
Once the protocol has been returned, a blue message appears in the content area notifying the user of the return [Figure 3.20].

3.9 Reports

To access the Reports page, go to the top menu drop-down and click on the Reports tab, directing the user to a page like the one shown below in Figure 3.21.

Setup Criteria

The criteria in setting up a report will differ based on the type of report. Some reports will generate more data fields and some allow the user to make changes and add comments. The most common report looks like the one in Figure 3.22 where the user will only have to fill out the Panel Name and dates.

Report Display and Types

Once the report is complete, the RCA can choose how the report will be displayed by selecting any of the format options [Figure 3.22].
3.10 Generic Report

To access the Generic Report page, go to the top menu bar drop-down and click on the Generic Report tab which will navigate the user to the page seen in Figure 3.23.
How to Build and Generate a Report

1. Check any of the boxes under the “Input Criteria” section you would like added to the report. When a box has been checked, it activates the drop-down bar in that row.

2. Select a category from each of the active drop-down bars.

3. Check the boxes under “Output Criteria” to manage what information is displayed on the report. Once all the necessary data fields have been entered and checked, click on the Generate Report action button.

4. A pop-up will notify the user the report has been created by asking the user to save or open the report.

**NOTE**: Some data fields will appear active or inactive depending on what boxes and general information have been selected.

Report Output Formats

Choosing an output format is dependent on how the user would like to view the report. Selecting a CSV or MS Excel file will open the report in a spreadsheet format. The HTML format opens the report in another browser and the PDF format is most commonly used for print [Figure 3.24].

![Please select format: CSV HTML MS Excel PDF](Figure 3.24)

### 3.11 Meeting Agenda

In order to access the Meeting Agenda page, go to the top menu bar drop-down and click on the Meeting Agenda tab, navigating the user to the page seen in Figure 3.25. The RCA can filter the agendas displayed by the “Panel” and “Meeting Date” drop-down bars.
Delete Agenda

To delete an agenda, select the box next to the agenda you intend to delete. Click on the blue Delete action button to terminate the selected agenda.

Accessing Agenda

Upon selecting the active agenda link under the “Agenda ID” column, the user is navigated to a page with details pertaining to the agenda. Review the agenda details on pages 27-32.

Pre-Meeting Set-up

The Planned Attendees tab displays a list of attendees who are expected to join the meeting [Figure 3.27]. The RCA may check the boxes under the “Specify if Attending” column to note panel members that are attending.

A - Clicking the Save action button will save any information the user has entered.

B - Clicking on the RSVP Email action button will generate a pop-up window with an email addressed to the selected attendees.

C - To add a guest to the meeting agenda, the RCA must click the blue Add Guest action button where they will be able to search and add a user by their User ID, First and Last name. Once the user has been found, select the box next to their name and press OK. The user will then be added to the list of attendees.
2 Set-up Early Agenda displays the details of the meeting. It is on this tab that areas such as the location, start and end time are entered and modified.
A - To attach a document, check the box next to the item you wish to attach under the “Item Name” column followed by clicking the Attach Document action button. A small pop-up window will appear with the option to browse and add an agenda item attachment.

NOTE: Only one attachment may be added at a time. Please upload a file with extension .pdf, .doc or .docx.

B - Clicking the Save action button will save the recent information entered.

C - Clicking on the Add Item action button will create a new drop-down bar [Figure 3.29] in the Item Name column of Figure 3.28. Use the drop-down bar to choose and Item Name and click on the pencil icon to add any necessary notes.

D - To add an item sequence, click on the Create Item Sequence action button which will result in a pop-up as seen in Figure 3.30. Select items from the “Available Agenda Items” section and transfer them to the “Selected Agenda Item” section using the arrow in the center of the pop-up.

E - In order to add a protocol to the Meeting Agenda, click the Add Protocol action button. A window with a list of protocols will appear allowing you to check the box next to the protocol you wish to add, followed by clicking the Add action button.

F - Clicking on the Create Protocol Sequence action button will result in a pop-up shown in Figure 3.31. Follow the same steps used in creating an item sequence to create a protocol sequence.
G - The **Delete** action button is used to delete an item from the 'Item Name' column. Check the box next to the item you want to delete, followed by clicking the **Delete** action button.

3 **Preview Early Agenda** is an overview of the items, notes and protocols involved in the meeting [Figure 3.32].

4 **Agenda** is a tab similar to the Preview Early Agenda tab in that it allows the user to review the items. Clicking on the blue active links allows the RCA to look at the agenda in different formats.
A - Clicking the **Send Agenda and Previous Minutes** action button results in a pop-up window that displays an email from the RCA to the meeting attendees.

B - The **Attach Agenda** action button permits the user to upload an attachment to the Meeting Agenda.

**NOTE:** Please upload a file with extension `.pdf`, `.doc` or `.docx`.

### Meeting

5 Meeting **Attendees** is a tab used to specify quorum for the meeting.
A - If a Panel Member voted, check the box in the same row as their name under the **Voted** column.

**NOTE:** Checking the voted box will auto-fill the **Attended** box.

B - If the member did not vote but attended the meeting, check the appropriate box in the **Attended** column.

C - If a member showed up after the meeting start time, enter their arrival time in the **Late Arrival Time** column.

D - If a member left the meeting early, enter their departure time under the **Early Departure Time** column next to their name.

---

**Post Meeting**

6. **Minutes of Meeting** is a tab that allows the user to view the actions taken in the meeting by clicking any of the blue active links as seen in Figure 3.35.

A - To add an attachment, click on the **Attach Minutes** action button which will generate a pop-up allowing the user to search and add an attachment.

**NOTE:** Please upload a file with extension .pdf, .doc or .docx.
3.12 Meeting Minutes

To access the Meeting Minutes page [Figure 3.36], go to the top menu drop-down and click on the **Meeting Minutes** tab. Once on the page, the RCA can filter the meeting minutes by both the ‘Panel’ and ‘Meeting Date’ drop-downs.

Comments

If there are comments attached to a protocol, the active link **Yes** will be present at the end of the protocol row and under the comments column as seen highlighted in Figure 3.36. If there are no comments, the link will read **No**.

![Figure 3.36](image)

Clicking on the active link will result in a pop-up like the one below [Figure 3.37]. Here, the RCA is able to view all of the comments in a grid format. To order the comments, click on the **Sequence Comments** action button. The pop-up has the same overall look and functionality as Figure 3.30 and 3.31 on page 29 and 30 of the manual.

![Figure 3.37](image)
Notes

If there are meeting notes available, the active link Yes will be present at the end of the protocol row and under “Notes” column as seen highlighted in Figure 3.36 on page 33. If there aren’t any notes, the link will read No. Upon clicking the active link, a pop-up is generated displaying three tabs: Meeting Notes, Pain Category, and Voting.

A - Meeting Notes is a tab that allows the RCA to view any notes on the meeting [Figure 3.39].

B - Pain Category is a tab that enables the RCA to select which pain category pertains to the protocol.

C - Voting is a tab that is used to record the vote, motion, and verify quorum [Figure 3.40].
Action

The action drop-down has different functionality for submission depending on the action selected [Figure 3.41].

![Figure 3.41](image)

**A - Administrative Actions** have two options that are not tied to the actions from a meeting, which are Move and Withdrawal.

1. **Moved** - moves the protocol to a different meeting date.

2. **Withdrawn** - the protocol would go to the Investigators non-active protocols section of their dashboard.

**B -** The remaining **Meeting Actions** are the result of the meeting and the vote on the protocol and will change the status as appropriate.

1. **Approved** - goes to the Investigator’s active protocols section of their dashboard.

2. **Modifications Required to Secure Approval** - goes to Investigator’s new section of their dashboard.

3. **Approval Withheld** - goes to Investigator’s non-active protocols section of their dashboard.

4. **Tabled** - moves the protocol to a different meeting date.
4 SEARCH PROTOCOL

Overview

No matter your role, all members have the ability to search a protocol. A user can access the Search Protocol page by first selecting the eProtocol menu on the top menu bar. Hover your mouse over your role and click on the menu tab titled Search Protocol.

You will be directed to a search page like the one shown in Figure 4.1. On this screen, you may search for all protocols that you have access rights to. Protocols can be searched by Study Title, Principal Investigator and Protocol ID. Searches can be saved for future use. Saved searches maintain the search criteria for faster subsequent searches.

Figure 4.1
You have successfully completed the Committee Manager and RCA Role Manual. We hope you have a better understanding of the overall functionality of your role. To review the overall functionality of eProtocol, please see the General Functionality and Dashboard Manual.

For more information on the functionality of other operating roles in eProtocol, please see The Investigator Role Manual or the Reviewer Role Manual.