Click IRB **Reference Guide**

Navigating Click IRB

The Quick Guide will help me to know

- How to use “My Inbox”
- How to navigate to the IRB module of the Click Suite of applications
- How to navigate to a specific study in Click IRB
- How to navigate around the study workspace

Using your Inbox

Once you login to the Click system, you are taken to **My Inbox**, which includes any Click items that need your attention. Submissions appear in your inbox when a process needs your involvement to proceed to the next step. The **My Inbox** listing includes the information in the table below.

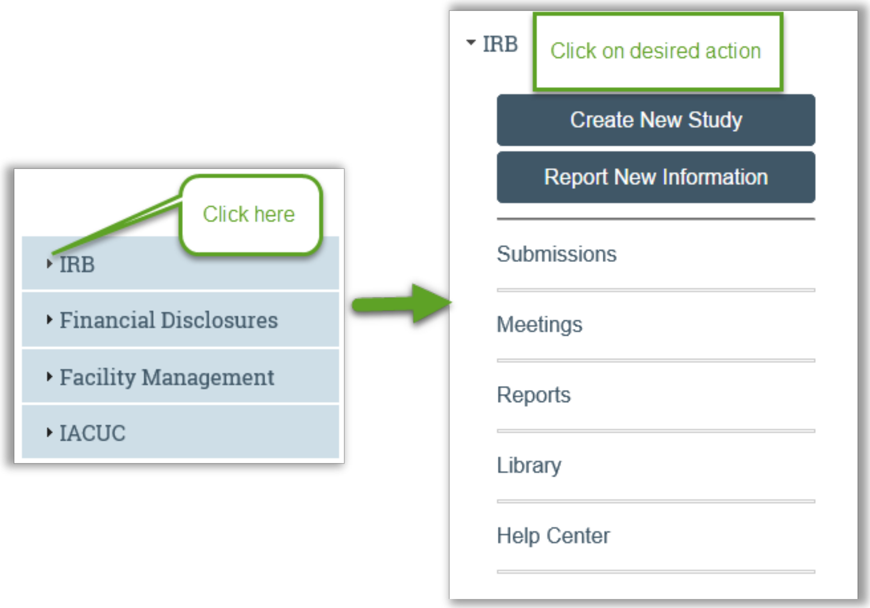
Heading	What it means
ID	Shows the unique identifier for the Click transaction
Name	Name (short title) and hyperlink to the transaction
Date Created	Date this study was originally created and saved
Date Modified	Last time the transaction was modified
State	The state of a submission provides context on what the next steps should be. • Any item in the Pre-Submission state is waiting for PI (or proxy) to complete and submit for review • Other states for IRB transactions are explained in the Quick Guide “States v. Activities”
Line	For IRB transactions, shows whether the study has been assigned to the Main or Analyst Line for review. Questions about **Line** assignment can be fielded by the assigned IRB Coordinator or the IRB inbox.
Coordinator	For IRB transactions, identifies the IRB staff member responsible for the submission, once someone has been assigned. Contact him/her if you need to talk to the IRB about the transaction

Navigation to Click Modules

From your **My Inbox View**, you can navigate to submissions workspace for the Click module of interest by selecting it from the top menu:

Module	Description
Home	Takes you to the main home page in CLICK/IRB. **Note:** this tab is not normally used in the IRB workflow.
Financial Disclosures	Takes you to your financial interest disclosure module, where you can take actions for your financial disclosures.
IACUC	Takes you to any animal research protocols you are involved with; you will likely need to log in again as Click IACUC is currently on a different server than Financial Disclosures and IRB.
IRB	When you select the IRB tab, you will see a list of all studies you are involved in. Using the tabs at the top of the study listing, you can choose the following selections:  • **In-Review**: any transactions in review • All **Active** Studies • **Archived** Studies • **New Information Reports** (RNIs) • **External IRB Studies** were Seattle Children's is relying on another IRB • **Sites**: any participating sites, or all submissions. • **All Submissions** will show every transaction you are associated with

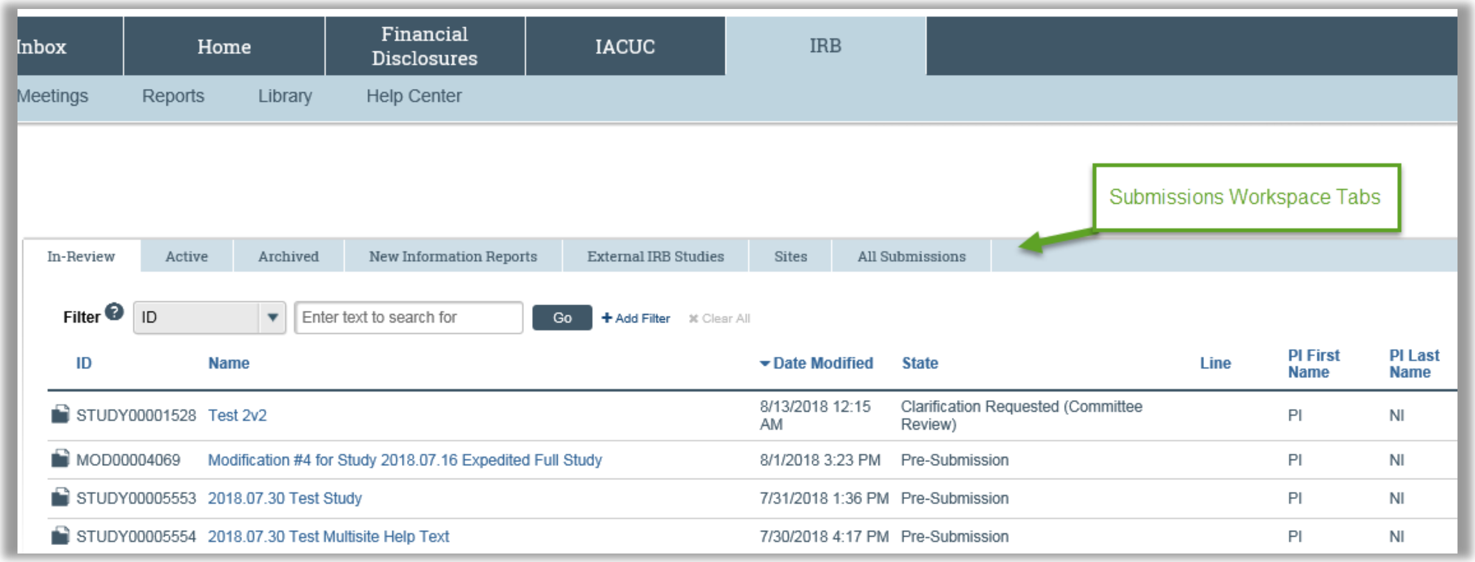
Alternatively, you can click on the arrows next to the Click Module of interest to expand the menu for possible actions



Action	What it means
Create New Study	Opens the SmartForm to create a new study
Report New Information	Opens the SmartForm to update where you can provide new information about a study
Submissions	Takes you to the submissions to the Workspace to see your submissions within a particular Click module
Meetings	Takes you to the meetings workspace if you are authorized to view it (e.g. an IRB member)
Reports	Various reports available from Click IRB that you are authorized to view
Library	Find Click IRB "Toolkit" Documents including • Standard Operating Procedures • Investigator Manual • Worksheets • Checklists, • Protocol and consent form templates
Help Center	Click Guides may be located here; however, use the guides on the IRB website rather than any guides located here: https://www.seattlechildrens.org/research/resources/institutional-review-board/click-irb-resources/

IRB Submissions Workspace

Once you land on the Submissions workspace for the IRB module. You can use the various tabs across the top of the table to locate your submissions.



Submissions Workspace Tab	Items Found
In-Review	Find studies, modifications, continuing reviews that require an action by the study team or are still pending IRB review
Active	Find studies that have been approved by the IRB
Archived	Find transactions that have been closed, discarded, or disapproved
New Information Reports	Find Reported New Information (RNI) transactions
External IRB Studies	Find studies where Seattle Children’s is relying on an external IRB
Sites	Find sites where Seattle Children’s or an outside institution is acting as a participating site (pSite) for a study overseen by a single/external IRB (sIRB)
All Submissions	Find all items

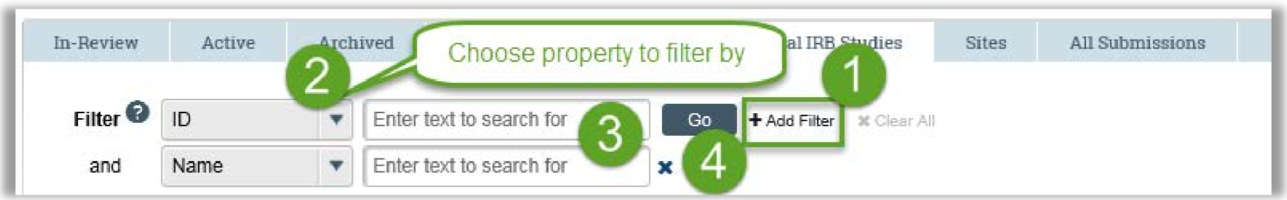
Click IRB **Reference Guide**

Navigating Click IRB

Filtering to Locate an IRB Study/Site

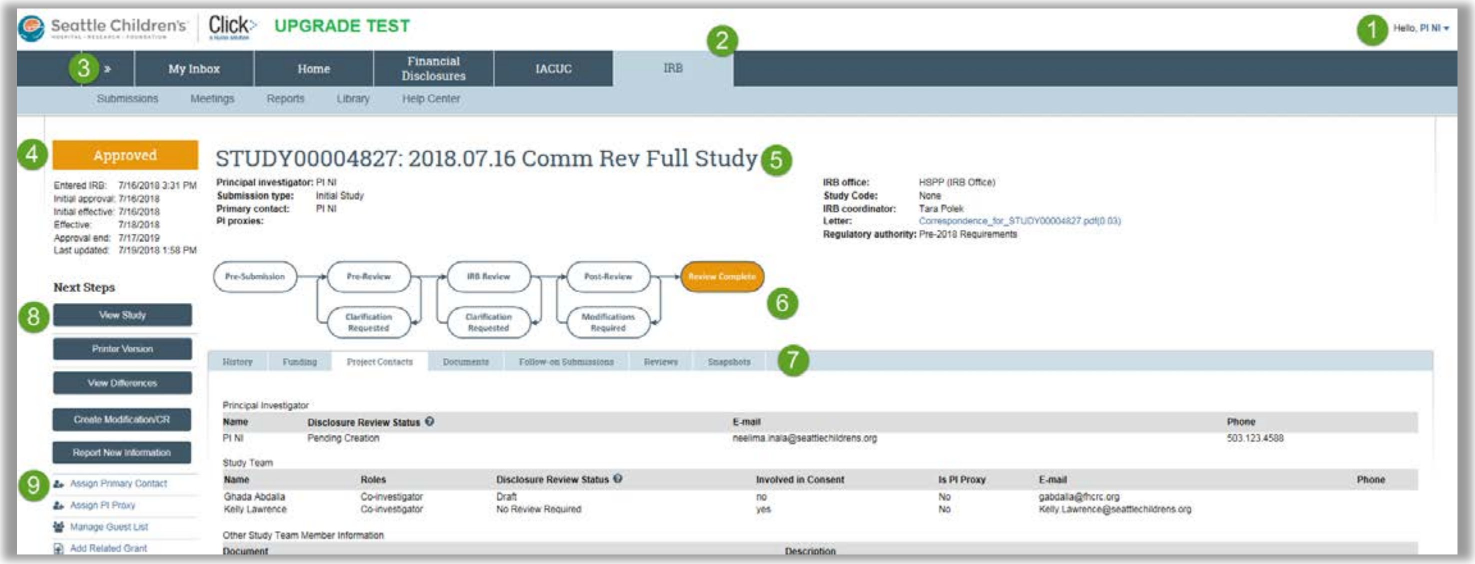
Tips:

- Remember to search the correct tab or you may not locate the item (e.g. you will not find an unapproved study on the **Active** tab).
- If you wish to search all items, choose the **All Submissions** tab
- If you want to quickly find one transaction, you can narrow your results by using either the **Basic** or **Advanced** filter bar. You can switch between the two by clicking on the link in the current filter bar.



Step	Action
1	Select Add Filter
2	Choose the property to search by from the drop-down menu: ID, Name, Date Modified, State, Line, PI First Name, PI Last Name, Coordinator, Submission Type
3	Enter desired criteria in the field to the right of each option. **Hint:** Use the percent symbol (**%**) as a wild card to aid your search.
4	Click **Go**

IRB Study/Site Workspace



Location ID	Items Found
1	Links to My Profile, password, and where to Log Off
2	Navigation between Click Modules/My Inbox
3	Double Chevron to expose "breadcrumb" links – each link goes to specific page the link represents
4	IRB Study Status Box – represents the details of the current study state
5	Summary Data – Summary of study data: study ID, Title, Principal Investigator, IRB Office, Submission Type, Primary Contact, and IRB Coordinator, Study Code(s)
6	Workflow Diagram – represents current state transaction workflow; orange oval shows where the transaction currently is within the workflow
7	Study Workspace Tabs • **History**: shows various actions that have occurred for a transaction • **Funding**: shows information from the funding tabs in the study SmartForm(s) • **Primary Contacts**: shows the study team information • **Document**: shows the study documents from the study SmartForm(s) • **Follow-On Submissions**: shows any transactions ("child" records) associated with a study ("parent" record) • **Reviews**: shows regulatory information associated with a transaction • **Snapshots**: shows a "snapshot" of the study SmartForm taken when a transaction hits the "Review Complete" state.
8	Next Steps Menu: various tasks are displayed to view/edit a study; obtain a printer version; create modifications or report new information
9	Activities – Dynamic list that displays all activities based on the user's permissions and the state of the study