CU Boulder – eRA InfoEd

Routing a Submission to a Faculty Advisor for Approval

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Preface:

This guide is for undergraduate and graduate student researchers. It explains how to add your Faculty Advisor (FA) to the review path of your submissions.

Think of the review path as a series of checkpoints. Each time you send a submission to the IRB it must always stop and be checked by your faculty advisor. In order for it to move forward, each submission must be approved. This is true for any submission in the research process.

As a student, the final submit button will not be active until you have added your Faculty Advisor, preventing you from missing this step.

If you encounter problems in the eRA system, such as error messages or performance issues, please contact the eRA Helpdesk at erahelp@colorado.edu.

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1. Submit Protocol And Accept Terms

Step 1: Open the submission screen, click **Submit**. – A new **Certification** window will open.

Step 2: Select **Accepted** and click the **Continue** button. – The screen will refresh.

2. Add Advisor

Step 1: Click the **Add New Person to Review Path** link at the top of the window. – A new window will open.

Step 2: In the text field begin typing the **last name** of your advisor. – A list of people will appear.
Step 3: Select your advisor.

Step 4: Confirm the **Approval Required** button is selected, then click **Add**.

Step 5: Confirm the routing path is correct.

Step 6: Click **Submit or Continue** (the text on this button will change depending on the context of the submission). The window will close and the status of the submission will be displayed in the top right corner of the screen.
Step 7: The status is now *Awaiting Faculty Advisor Review*. Click **Done**.

**Note:** The protocol has *not* yet been submitted to the IRB Office for review. Your Faculty Advisor must review *and Approve* your submission before it moves forward.
3. Respond To Requested FA Changes

When your submission is reviewed by your Faculty Advisor they may request changes before submitting to the IRB. These changes may be communicated to you directly, or via email from the eRA system. To make the changes required by your advisor:

**Step 1:** Open the submission that has been returned for revision. It will now have a status of *In Development*.

**Step 2:** To review and respond the Faculty Advisor’s comments:

1. Click **Route History** to see specific comments and what changes are required.
2. Make any changes necessary to address the Faculty Advisor's comments. To fulfill the requirements, you may have to **ADD** a new document, **MODIFY** and upload a new version of an existing document or **EDIT** an eForm.

To **ADD** a new document:

1. To add a new document, click the **Add** link at the top of the table on the **Response to <Type>** screen. The link is located next to the **Form/Document** column header.

2: A new **Upload** window will open. Complete the following:
   a. **Name:** Enter a unique name (e.g. ConsentForm_010117).
   b. **Location:** Click the **Browse** button. A dialog box will open. Locate and select the document to be uploaded on your computer, then click the **Open/Choose** button in the dialog box to attach it.
   c. **Category:** Select the appropriate category for the revised document.

3: Click the **Upload** button. The screen will refresh. Click the **Close** button.
4: On the submission screen, you will see the new document listed. Click on the name of the document to preview it.

To MODIFY or upload a revised document:
1: Open and revise the document. Click the name of the document needing revisions. Make any necessary changes as outlined in the letter from the IRB. Ensure tracked changes have been turned on for Word Documents. Then save the revised document to your computer.
2: Click **Modify** for the document to be changed to open the **Select a function** window.

3: Select the appropriate function:
Upload allows you to upload a new version of the existing document, but does not change the Name or Category.

Upload and Attributes allows you to both upload a new version of the document and to change the Name and Attributes. The change will take effect when you click the Upload button.

4: A new **Upload** window will open. Complete the following:
   a. **Location:** Click the **Browse** button. A dialog box will open. Locate and select the document to be uploaded on your computer, then click the **Open/Choose** button in the dialog box to attach it.
   b. **Name:** (If needed) Enter a unique name (e.g. ConsentForm_010117).
   c. **Category:** (If needed) Select the appropriate category for the revised document.
   d. Click the **Upload** button in the Upload Window. The revised document will upload and the window will close.

To EDIT an eForm:
1: To revise an eForm, click on the name of the form needing revision

2: **Uncheck** the **Complete** checkbox at the top of the form.

3: Make any needed changes. Click the **Save** button, and then re-check the **Complete** checkbox.
Step 3: Resubmit your study (return to the beginning of this document).
Important: You must Add your Faculty Advisor to Approve your submission after changes are made or it will be returned un-reviewed.