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ABOUT COEUS
Coeus is a research administration and grant management system developed by the Massachusetts Institute of Technology's Office of Sponsored Programs and implemented by the University in April 2006. The system centralizes stored information about proposals, protocols, awards, & subawards and is the system of record for all research activities for the University. In addition, it contains interfaces for proposal-development and IACUC protocol submissions that are electronically routed and approved within Coeus.

The IACUC Module in Coeus has been designed to allow Departmental Administrators and Investigators to construct full IACUC Protocols from the desktop and route the protocol online for internal approvals. The IACUC Module also serves as a database of all protocols developed by the department and is a central source to view the most current version of a protocol in progress. Coeus Lite is the web-based version of the Coeus application. The IACUC Module in Coeus Lite allows users to prepare and view protocols then route the completed application for IACUC review.

○ CONVENTIONS USED IN THIS GUIDE

<table>
<thead>
<tr>
<th>Item</th>
<th>Convention</th>
<th>Example</th>
</tr>
</thead>
</table>
| Menu and List item name / Icon that represents the same function | Bold, separated by “→”                  | Select Edit → Persons - ![Edit Persons](image)
| Section or Screen of protocol record | Bold, red                               | Narratives Section                           |
| Window or tab name            | Dotted underline                        | IACUC Protocol List Window                   |
| Field, checkbox, option icon, or key name | Bold and underline, blue              | Protocol No, field                           |
| Note of interest              | Note image                              | ![Note](image)                               |
| Tip                           | Light bulb image                        | ![Tip](image)                                |
| New Functionality/Enhancement | New sign                                | ![NEW](image)                                |
| Start of each procedure       | Bold and highlighted, grey              | PROCEDURE                                    |
| End of each procedure         | Bold and highlighted, grey              | End of Procedure                             |
| Field Definition              | → Field Name, blue                      | → Protocol No.                                |
| Link                          | Bold, blue                              | LAUNCH COEUS LITE                            |
| Button                        | Bold and in brackets, blue              | ![LOGIN](image)                              |
I. GETTING STARTED

This section will introduce you the IACUC Protocol Module in Coeus Lite, instruct you how to login to Coeus, and demonstrate how to get help in Coeus.

- IACUC Protocol Module Overview

The IACUC Protocol Module in Coeus has been designed to allow Departmental Administrators and Investigators to develop complete protocols from the desktop, and electronically route protocols for IACUC review, and use active protocols as a foundation for annual and 3yr submissions along with Amendments.

As a Committee Reviewer you will receive 2 different notifications that will require different actions in the system. One will be the “Review Type Determination” email and the second will be the “Selected Reviewer” email.

- The Review Type Determination email is a notification to alert you that there is an IACUC submission that needs review to determine if Full Committee Review is necessary or if the submission can be reviewed by Designated Member Review (DMR).

- The Selected Reviewer email is a notification to alert you that you have been selected as a Designated Member Reviewer for a specific protocol submission.

Each notification contains a link that will bring you directly to Coeus Lite and once you login, it will direct you automatically to the appropriate section of the protocol identified in the email.

This guide will walk through the Committee process required for each type of notification and different aspect of Coeus Lite that are only available to the Committee members.
**LOGGING INTO COEUS LITE**

In order to access Coeus you must complete the *Coeus Request for Access form* - found on the *Computing Accounts & Passwords Webpage* (https://remedyweb.brown.edu/arsys/shared/login.jsp).

The Coeus application authenticates using your Brown User ID and Password.

**PROCEDURE**

1. To begin, use your internet browser to access the URL for the Coeus download page: 
   https://coeus.brown.edu

   OR

   Go to the Coeus Support Webpage at
   http://www.brown.edu/research/proposals-awards-research-administration/coeus-access-support/coeus
   to access the link to Coeus Lite

   *When accessing Coeus Lite from “off campus,” you must be logged into SSL- VPN to access Brown’s servers.*

   **Link to Brown WebVPN Service:** http://vpn.brown.edu.

   You will be asked to log in using your Brown Username and Password.

   ![Image of Secure Logon for F5 Networks]

   If you try to access Coeus Lite from outside of Brown without being logged into VPN you will receive the following message:

   "Network Timeout The server at coeus.brown.edu is taking too long to respond. The requested site did not respond to a connection request and the browser has stopped waiting for a reply."

2. To open the Coeus Lite; Open your browser and navigate to the Coeus page or copy and paste the Coeus link
   http://coeus.brown.edu/prod/ into your browser address bar. Click on the **LAUNCH COEUS LITE** link.
3. You will be directed to this Coeus Login Page after you click the LAUNCH COEUS LITE link.

The Coeus application requires your Brown User Name and Password for login.

- Click in the User Name field and enter your Brown User Name.
- Click in the Password field and enter your Brown Password.
- Click on the [LOGIN] button

The Coeus Lite Homepage will open where you can access your protocols.

End of Procedure
GETTING HELP IN COEUS

The Coeus Lite application contains a help link which directs the user to the Coeus Support Web page.

PROCEDURE

To get to the Coeus Support Webpage from the Coeus Lite application:

1. While in the Welcome to Coeus Lite Page, click on the COEUS SUPPORT PAGE link on the left hand side of the page.

   The Coeus Support Web Page will open.

2. Click the COEUS IACUC PROTOCOL SUBMISSION link on the left-side navigation to get to the IACUC Protocol documentation. There are various topics to choose from the left-side navigation. The right-side navigation provides additional quick resources and training information.

3. To close the Coeus Support Webpage and return to the Coeus Application, click on the red [X] button in the top right hand corner of the window browser.
II. REVIEW TYPE DETERMINATION

The Review Type Determination email will be distributed once a submission has been preliminary reviewed for completeness by the Research Protections Office. The email is automatically sent to all members of the committee.

There is only one notification for all submissions.

- The body of the email contains:
  - A brief description of what is need by the “Reviewer”
  - A time frame by which to respond, either 3 or 5 days
  - A link to the protocol submission in Coeus Lite

- REVIEWING THE PROTOCOL

In this section we will review how to enter a protocol from the Determination email, and what are the necessary steps to review and request a full committee review.

PROCEDURE

1. To review the submission, click on the link in the email.
The **Coesus Lite Login Page** will open.

2. Login using your Brown username and password.

Once logged in, Coeus will open directly to the **Review Comments Section** of the protocol submission that requires **Review Type Determination**.
3. Use the left hand navigation to review the protocol from within the application.

   a. Click on the **PROCEDURES** link to open the **Protocol Procedures Screen**

   b. Click on the **View All Tab** to see a summary of assigned protocol procedures, procedure personnel and locations.

   If you prefer, you can use the **Print Summary** function to generate a PDF document of all the information contained in the protocol Coeus record and attachments.
To Generate a Print Summary:

Click on the **PRINT SUMMARY** link from the left hand navigation panel.

The **Print Summary Screen** will open, with all of the sections checked off by default. (All checked off sections will appear on the Summary document.)

If you wish to omit certain sections, simply uncheck the box next to each one.

Click on the [PRINT] button to generate the Summary.
The Protocol Summary will open as a PDF document.

4. If you are satisfied with your Designated Member Review (DMR), no further action is required.

5. If upon your review, you deemed it necessary to request Full Committee Review, follow the steps below. (Section: Requesting Full Committee Review)

End of Procedure

REQUESTING FULL COMMITTEE REVIEW

PROCEDURE

To request Full Committee Review for a submission:

1. Click on the REVIEW COMMENTS link in the left hand navigation. The Protocol Review Comments/Attachments Screen will open.
2. Click on the **REVIEW TYPE DETERMINATION** link within the **Protocol Review Comments/Attachments Screen**.

The **Review Type Determination Screen** will open.
3. Select **Full Committee Review** from the [Review Type Determination](#) drop-down list and click on the [Save] button.

Your recommendation will be sent to RPO and the submission will be assigned to the next IACUC Full Committee Agenda.

**End of Procedure**
III. SELECTED REVIEWER – DESIGNATED MEMBER REVIEWER

If you have received the Designated Member Reviewer email notification, you have been assigned as a Designated Member Reviewer for a specific protocol submission.

The body of the email that you receive will contain:
- Protocol attribute information
- Brief instructions
- A link to the specific protocol

o REVIEWING THE PROTOCOL

PROCEDURE

1. To review the protocol, click on the provided link in the email.

Please use the link given below for the project details.

You can view or approve this protocol through CoeusLite at the following address: https://coeus-dev.brown.edu/devl/getiacucData.do?SEARCH_ACTION=SEARCH_WINDOW&protocolNumber=1307000412&PAGE=G&sequenceNumber=1
2. The Coeus Lite login Page will open; use your Brown username and password to log into the system.

Once logged in, you will automatically be directed to the General Info Screen of the protocol that needs your review.

3. Navigate through the protocol to review each section using the left side navigation panel.

The Coeus protocol contains:

- Basic information entered into data fields
• Information contained in upload documents (scientific information, personnel training information, PI certification)

4. Click on the PROCEDURES link to open the Protocol Procedures Screen.

5. Click on the View All Tab within the Protocol Procedures Screen to see a summary of all assigned procedures, procedure personnel and procedure locations.

If you prefer, you can use the Print Summary function to generate a PDF document of all the information contained in the protocol Coeus record and attachments.
To Generate a Print Summary:

Click on the PRINT SUMMARY link from the left hand navigation panel.

The Print Summary Screen will open, with all of the sections checked off by default. (All checked off sections will appear on the Summary document.)

If you wish to omit certain sections, simply uncheck the box next to each one.

Click on the [PRINT] button to generate the Summary.
The Protocol Summary will open as a PDF document.

**BROWN UNIVERSITY**

Protocol Number: 1307000431
Investigator: Szulc, Justyna

Protocol Number: 1307000431
Title: testing functions
Status: Submitted to IACUC
Last Approval Date:
Investigator: Szulc, Justyna

End of Procedure
IV. MAKING DESIGNATED MEMBER REVIEWER’S RECOMMENDED ACTION

Once the review of the protocol has been complete, the DMR reviewer will need to make a “Recommended Action” in the system to notify the IACUC Manager of what they recommend for the protocol submission.

There are 4 Recommended Actions that a member can take:

<table>
<thead>
<tr>
<th>Recommended Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designated Review Approval</td>
<td>Select this recommended action if the protocol submission is approved as is without any further revisions.</td>
</tr>
<tr>
<td>Minor Revision Required</td>
<td>Select this recommended action when the revision needed to the protocol submission can either be handled by RPO directly or send back to the DMR reviewers only.</td>
</tr>
<tr>
<td>Major Revisions Required</td>
<td>Select this recommended action, when the revisions to the protocol need to be reviewed by the Full Committee before final approval.</td>
</tr>
<tr>
<td>Full Committee Review Required</td>
<td>Select this recommended action when the DMR reviewer feels this protocol submission needs Full Committee Review.</td>
</tr>
</tbody>
</table>

- **DESIGNATED REVIEW APPROVAL**

**PROCEDURE**

After the review of the protocol is complete, if the protocol submission is approved as it is, the recommended action you will take is the “Designated Review Approval”, meaning you are approving the protocol submission.

1. Click on the **REVIEW COMMENTS** link in the left hand navigation, the **Review Comments/Attachments Screen** will open.
In the Protocol Review Committee/Attachment Screen you will see 3 new links:

- Add Review Comments
- Add Review Attachment
- Review Type Determination (The Review Type Determination has already been made at this stage; there is no need to click on this link.)

2. Click on the Add Review Comments link, a new Comment field will open. This field is required when recommending an action.

3. Enter a Comment in the textbox provided.

For a protocol that is Approved, the only comment that is needed is “Approved” or “Submission Approved.”

4. When finished, click on the Final checkbox to allow other Designated Member Reviewers for this submission to view your comments. If this box is not checked, your comments will not be shown.
The **Private** check box should remain checked, if it is not checked all of the comments can be seen by the investigator.

5. Click on the **SAVE** button to add your comments.

The Comment is now added to the **Protocol Review Comments Section** and the **COMPLETE REVIEW** link is now active.

6. To complete the approval action, click on the **COMPLETE REVIEW** link. A **Complete Review Screen** will open, displaying new fields.

7. In the **Complete Protocol Review Screen**, select “Designated Review Approval” from the **Select a Recommended Action** drop down list.

8. Click on the **Ok** button to continue.

Once you click on the **Ok** button you will be redirected to the **General Info Screen**.
MINOR REVISIONS OR MAJOR REVISIONS

The process for requesting minor or major revisions to the protocol submission is similar to the approval process, except you are going to use Coeus to enter and request corrections to the protocol.

PROCEDURE

1. After the review of the protocol is complete, click on the REVIEW COMMENTS link in the left hand navigation, the Protocol Comments Screen will open.

Depending on how extensive the list of revisions is, there are two places they can be entered.

Revisions can be added in the Comments textbox located in My Review Comments Section or uploaded as an attachment in the My Review Attachments Section.

2. To Add Review Comments:

   a. Click on the ADD REVIEW COMMENTS link to display the Comments textbox.

   A comment is required even if an attachment is uploaded. If uploading an attachment enter “See Attachment” in the Comment textbox.
b. Enter your revisions comments in the **Comment** textbox provided.

You can use **Control+C** and **Control+V** to cut and paste in the textbox or if it is more convenient you can upload an attachment.

c. Once comments have been entered, click on the **Final** checkbox to allow other DMRs to view your comments.

d. Click on the [SAVE] button to add the comments to the protocol.

3. To add the Attachment with requested revisions, click on the **ADD REVIEW ATTACHMENT** link.
Upon clicking on the **ADD REVIEW ATTACHMENT** link, new fields will display.

![Protocol Review Comments / Attachments]

a. In the **Description** field enter the following: “Revisions_Attachment”

b. Click on the [**BROWSE**] button to search for and upload the PDF document.

c. Check the **Private** checkbox to set the document to private. *(If document is not set to Private the PI and anyone with access to the protocol can see the attachment. If it is not checked at the time it is uploaded, the IACUC Manager will set it to private when reviewing the comments.)*

![Protocol Review Comments / Attachments]

d. When finished, click on the [**SAVE**] button and the attachment will be added to the protocol and listed under the **My Review Attachments Section**.

![Protocol Review Comments / Attachments]

4. The final step in recommending revisions for the protocol is to click on the **COMPLETE REVIEW** link in the Protocol Review Comments/Attachments Screen.
a. A new field will open. From the **Select a Recommended Action** drop-down list, select the appropriate revision type.

<table>
<thead>
<tr>
<th>Revision Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor Revision Required</td>
<td>Select this recommended action when the revisions needed to the protocol submission can be handled by RPO directly and sent back to DMR reviewers only.</td>
</tr>
<tr>
<td>Major Revisions Required</td>
<td>Select this recommended action when the revisions to the protocol need to be reviewed by the Full Committee before final approval.</td>
</tr>
</tbody>
</table>

b. Once a selection has been made, click on the [Ok] button to continue.

The **Review Comments Screen** will close automatically and you will return to the **General Info Screen**. The recommended action can now be seen by other reviewers and by the IACUC Manager. Nothing further is required, you can log out of Coeus.

**End of Procedure**

- **TO REQUEST FULL COMMITTEE REVIEW (AFTER IT HAS BEEN ASSIGNED TO DESIGNATED MEMBER REVIEW)**
As a Designated Member Reviewer you can request that a submission be assigned to a Full Committee Review at any time by following the steps below:

**PROCEDURE**

1. Click on the Review Comments Section and enter “Full Committee Requested” in the Comment textbox.

![Protocol Review Comments / Attachments]

- Mark the comment as final by checking the Final checkbox.
- Click on the [SAVE] button.

2. Click on the COMPLETE REVIEW link, a new field will open.

![Complete Protocol Review]

- Select “Full Committee Review Required” from the Select a Recommended Action drop-down list.
- Click on the [OK] button when finished. The recommended action will be assigned.

The Review Comments Section will close automatically and you will be redirected to the General Info Screen.

End of Procedure
V. ADDITIONAL INFORMATION

As a member of the IACUC you have access to two additional links from within the IACUC Module.

- All My Reviews
- Schedule

○ All My Reviews

The All My Reviews Screen will display the protocols to which you have been assigned as a reviewer. This screen will contain all of the following submission types:

- Review Type Determination,
- Designated Member Review,
- A list of your completed reviews.
THE REVIEW TYPE DETERMINATION SECTION

The **Review Type Determination Section** will list all submissions for which notifications have been sent to committee members for Review Type Determination.

A submission will remain in the **All My Reviews Section** until the **Determination Due Date** has passed. It will no longer be listed in this section after the due date.

### Procedure

1. To review the protocol for the **Review Type Determination Screen**, click on the protocol submission link.

2. The submission will open to the **Protocol Review Comments Section**.

3. Review the protocol and only if **Full Committee Review** is required, click on **Review Comment > Review Type Determination** and select **Full Committee Review Requested**.

If you review the protocol and DMR review is acceptable no action is required.

**End of Procedure**
### Pending/In Progress Review

This section of the All My Reviews Screen lists all of the protocol submissions where the user is selected as a specific DMR reviewer. All submissions listed here need recommended action.

#### Procedure

1. Click on the link of the protocol submission, the Protocol Review Comments Section will open.

2. Review the protocol and take the recommended action. (Follow the steps outlined in section – Making DMR Recommended Actions)

   After the recommended action has been taken, the protocol submission will move from the Pending/In Progress Reviews Section to the Complete Reviews Section of the All My Review Screen.

End of Procedure

### Completed Reviews

The Completed Reviews Section will list all protocol submissions on which the review has been completed by the user. Once the final action has been taken by RPO and the submission status officially changed, the submission will be removed from the completed review list.
*Schedule*

The **Schedule Screen** displays meetings planned for any committee to which the user is assigned to. Meetings will not appear until the IACUC Admin is ready to display them to IACUC members. Once the Agenda has been generated and marked as final by RPO it can be accessed from this screen.

**Procedure**

1. To view the Agenda, click on the **View Agenda** link.

The PDF document will open.

*The Attachments link is Currently Not Used.*
2. To see the list of protocols included in the meeting where you are the reviewer, click on the sign next to the meeting date.

<table>
<thead>
<tr>
<th>Meeting Date</th>
<th>Place</th>
<th>Committee ID</th>
<th>Committee Name</th>
<th>View Agenda</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/05/2013, Thursday</td>
<td>Brown</td>
<td>IACUC</td>
<td>IACUC</td>
<td>View Agenda</td>
<td>Attachments</td>
</tr>
<tr>
<td>08/06/2013, Thursday</td>
<td>Brown</td>
<td>IACUC</td>
<td>IACUC</td>
<td>View Agenda</td>
<td>Attachments</td>
</tr>
<tr>
<td>08/07/2013, Thursday</td>
<td>RPO</td>
<td>IACUC2</td>
<td>IACUC2</td>
<td>View Agenda</td>
<td>Attachments</td>
</tr>
</tbody>
</table>

**End of Procedure**