PI/Delegate: Responding to Action Items

CONTENTS

Open Action Item 2
Review and Reply to Reviewer Comments 3
Make Changes to Forms 7
Compare Form Versions 8
Save & Re-Complete the Protocol Forms 9
Submit Response to Comments / Updated Forms to Reviewer(s) 9
Overview:

If changes or corrections are required as a result of the protocol review completed by ARPP or the Vets, an action item is created. The action item is emailed back to the PI. You will access the protocol through the Task/Assignment window and reply to reviewer comments and/or request(s) for changes in the protocol record.

Open Action Item

*If already logged into InfoEd, Skip to Step 1.b*

1. a) Email is sent to your Gmail Account:
   - Subject: “Protocol Number” - Modification Request Type.
     - Vet Pre-Review Modifications Requested
     - Pre-Review Modifications Requested
     - Vet Modifications Requested
     - Major Modifications Required
     - Modifications Required
   - From: Last Reviewer (i.e., Vet, ARPP Member).

   ![Email Example](image)

   - Click ‘Log In’ link to open the Task/Assignment.
   - The Task/Assignment window opens:

   ![Task/Assignment Window](image)
1. b) At ‘Things to Do’, look at the list of open action items in your list.
   - **Delegates** – click the action items dropdown menu to choose the PI whom you need to see items for.

   ![Image of Things to Do](image)

   - Click on the protocol link to open the item.

**Review and Reply to Reviewer Comments**

*Note: Contains two form types: Main Form and Species Specific Form(s)*

2. To review reviewer comments:
   - Click the ‘Protocol Animal Use Form’ link to review the reviewer’s comments in the protocol:

   ![Image of Protocol Animal Use Form](image)

   - Main Form opens in new window:
The Species page in the Main Form contains link(s) to the Species Specific Form(s).

- Click the Animal Use Form link on the Species page of the Main Form to open the Species Specific Form.

  Note: The Species Specific Form has its own comments separate from the Main Form.

3. Review Main Form and Species Specific Form(s)
   - If form(s) were previously reviewed and changes were made the Form History button will be available to compare previous versions; i.e., specific changes will be highlighted on each form. [Step 10].
   - PI/Delegate can make changes to the forms directly [Step 9] and/or reply with comment(s) directly on a field/question in reply to a reviewer. [Step 7].

4. To view a listing of all comments click the Comments Panel button on the top of each form.
   - Note: Main Form and Species Specific Form(s) have separate comment panels

5. Overview of the Comment Panel:
• Use the plus/minus +/- signs to expand or minimize (hide) each comment in the panel.
• When expanded, read and reply to each comment.
• To jump to the item that has the comment on it, click that item’s Subject in the Comments Panel. If it there is a mandatory response required, the item is outlined:

6. Read comments from reviewers by either:
   o Clicking the ‘Comments Panel’ to see a listing of all comments on each form (click this on the Main form and also the Species Specific Form [on the Species page of Main form]).
     ◦ Note: There are two comment panels, one for each form of the protocol.

OR browse through the protocol forms reviewing each field/question:

• Clicking items with a yellow exclamation point 🔄 icon which indicates there is a comment to review.
• Clicking items with a red circled exclamation point ⚠️ icon which indicates there is a comment to review and response is mandatory.
7. From ‘Comments Panel’, on the comment you want to reply from, click the reply button:

- Reply window opens:

  - ‘To...’ is already set to reply back to the reviewer who made the comment.
  - Type your reply in the ‘Message’ text box.
  - Review your reply since once it is posted, there is no editing of the reply.
  - Click the Post button to post your reply to their comment. (Skip the ‘Response Required’ checkbox, as reviewer responses are not required.)

- Note: Once a comment is posted it cannot be edited.
  - To update a comment, you need to click the ⊕ or ⊖ icon next to field/question and add an additional comment to field/question.

8. Once you post a reply, ‘Comments Panel’ shows a green checkmark on reviewer comments that you replied to:
Individual items on the forms also show a green checkmark once replied to:

![Image of form with checkmark]

**Make Changes to Forms**

9. Follow the steps below if **making changes to fields/questions** on Main Form and/or Species Specific Form(s)

   - Click the **Complete checkbox** (uncheck the box) on the Main Form and/or Species Specific Form(s) to open forms in edit mode.

   - Make changes to fields/questions.
   - Click **Save** button to save changes on each form.
   - When all changes are made check the **Complete checkbox** on each form.
     - Note: Species Specific Forms must be completed before the Main Form
   - To view any changes, click form history button.
Compare Form Versions

10. To review form changes, click the ‘Form History’ button to compare versions and see changes.

Note: Each form [Main Form and Species Specific Form(s)] will have its own Form History.

- Form History window opens:

(a) Choose the submissions to compare by clicking the applicable From/To radio buttons
(b) The Completed On column identifies the date/time of changes to the submission.
(c) Click the Go button to open the compare window.

- Compare window opens.
  - Page links marked with an asterisk (*) are pages with changes. Click on page number to navigate to that page.
Additions are highlighted in Green
(b) Changes are highlighted in blue - If Species form was modified, it will highlight in Blue (main form)
(c) Deletions are highlighted in Red.

Note: Each form [Main Form and Species Specific Form(s)] will have its own Form History. You need to open each form to identify changes within each.

Save & Re-Complete the Protocol Forms

11. When all changes and/or commenting are complete.

- Click the Save button.
- Click the Complete checkbox to re-complete the form(s) you edited.
  - Be sure to complete this on any form edited- Main form and Species Specific Form(s) [access via the Species page of the Main form]

Submit Response to Comments / Updated Forms to Reviewer(s)

12. At the Task/Assignment window, submit your changes and/or posted comments:
- Click the ‘I am done’ button in the top right corner.
- Click the ‘Close’ button to the right of ‘I am done’ to exit.