Animal Oversight & Hazard Safety Committee Reviewer Manual

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Each institution has a unique protocol review workflow process. For example, some IBC programs send all new protocols to the IBC meeting for Full Committee Review. Some IACUC programs send submissions to all members to poll the committee to determine if items should be called to a full committee meeting. The Cayuse Animal Oversight and Hazard Safety applications rely on the IACUC or IBC office role to route the submission through the applicable review workflow.

When submissions are assigned to committee members, the system will send an email to alert the reviewer of the assignment. To view and complete assignments, reviewers will log into the system under the applicable committee member role, IACUC Committee Member or IBC Member.

The inbox will display submissions for review under the Alert called 'Protocols in Review.' In the inbox, reviewers will see a table with different columns. The definitions of these columns are below.

- **PI:** PI name
- **Protocol Number**: Protocol Number
- **Date and Time Sent:** These columns display when the submission was assigned to the committee. member. It is important to note that some programs set deadlines for review assignments.
- **Title:** Protocol Title
- **From and To:** These columns indicate that the submission was sent from the IACUC or IBC office to the members for review.
- **Action:** This is a very important column. It displays what type of review the submission is under. As mentioned previously, all institutions have unique submission workflows. Please refer to the institutional IACUC or IBC office if there are questions about the specific action assigned in the system.
- **Type:** This column displays the submission type. It may display Amendment, New protocol, or De Novo protocol. It is critical for members to note the submission type. *If an amendment is assigned, it is strongly recommended that members use the Protocol Versions compare function to review all changes that have occurred in the amendment.* This function is discussed in a different section of this guide.
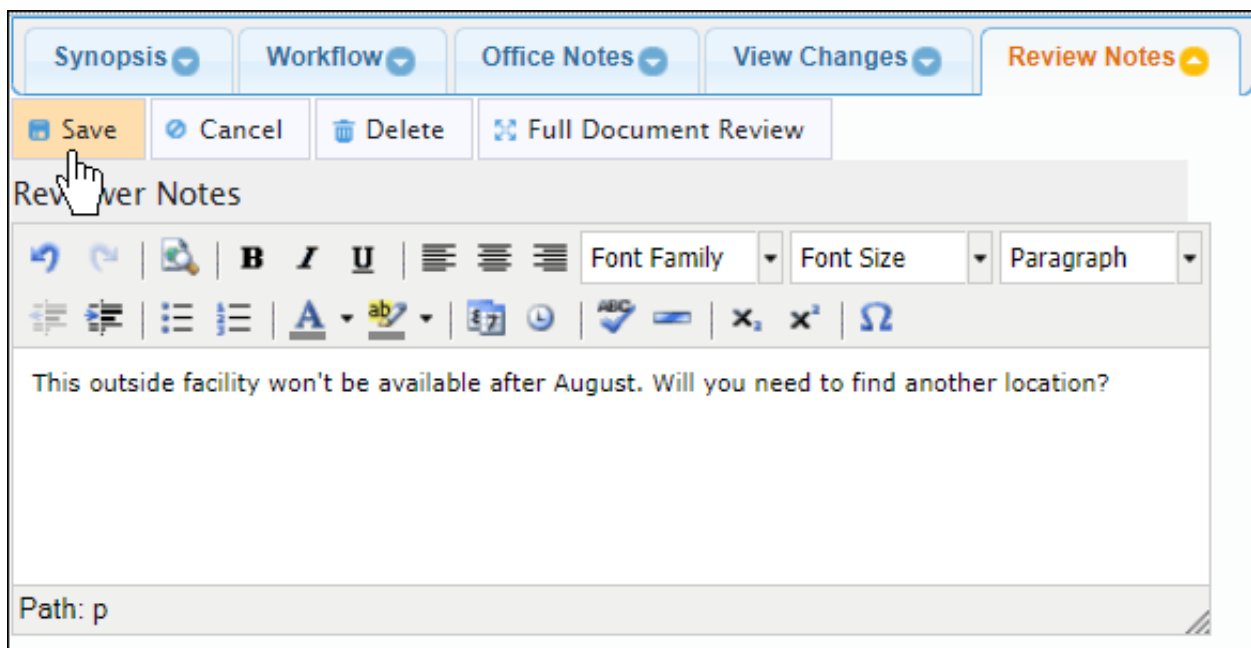
Reviewing an Assigned Submission

To access the submission, click on the protocol number hyperlink from the inbox. This will open the submission. The Review pane displays in the top right-hand corner of the protocol form. Click the tabs to expand or minimize the review tools.

1. **Office Notes:** Displays Designated reviewer's comments as well as IACUC coordinator merged comments. All previous revision comments are available for viewing here.
2. **View Changes:** Displays the previous contents of the field and current changes made by the PI.
3. **Review Notes:** Shows all comments made by the reviewers. IACUC coordinator can also add comments and merge comments. Only merged comments and Designated Reviewer comments are viewable to the PI.

Adding Comments

Click on the Review Notes tab to enter comments. You can also click on a Text or Word editor field to enable the review pane.

Enter your notes in the Reviewer Notes section and click **Save**

All IACUC review notes are automatically displayed in the Office Notes tab. Each revision is identified by its Review Number. When IACUC merges all of the reviewer's comments, they also display on this tab. The PI sees only the notes found in the Office Notes tab.

You can view all of the revision notes regardless of the current revision. The Revision Number is automatically updated when the PI submits the protocol to the IACUC office.

Adding Footnotes

Reviewers can add footnotes in text fields or word editor fields.
1. Click within the text response in the protocol form to enable the Changes tab in the Review pane. This is useful when reviewers need to reference an exact location in the text.
2. Click the Add Comment button, then click in the location of the text needed to reference
3. Click by the comment bubble in the Review Notes section below to add your comments
4. Click Save

View Changes

The Changes tab displays what the PI changed. The items crossed out in red indicate what was removed. The underlined text highlighted in green reflect the new text.
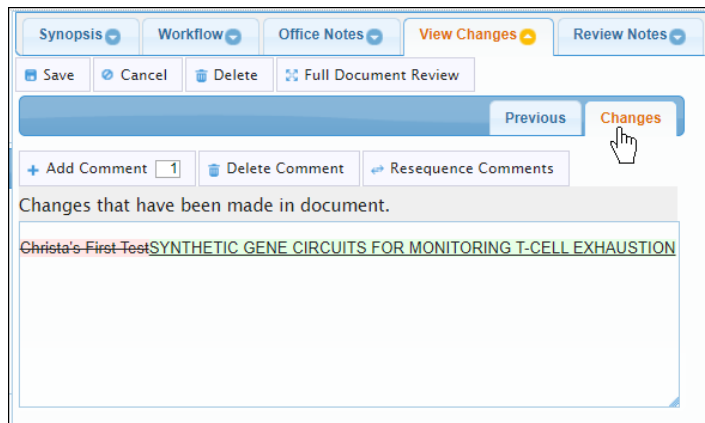
The IACUC or IBC office can choose to edit these notes prior to submitting the protocol to the investigator.

Reviewing PI Responses to Committee Responses

When the investigator submits a protocol back to the IACUC office, the pages in the TOC are marked with icons. The green check marks indicate the PI reviewed the recommendations. Any pages marked with a notepad and a pencil are pages the investigator modified which were not flagged for change.

As the IACUC office reviews the changes made by the PI, the review pane helps to see the changes made to the large text-area and word-editor fields.

Modified Field Representations
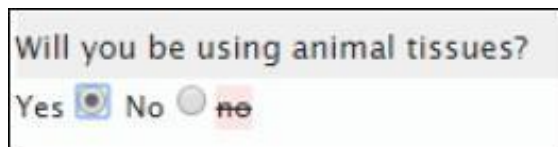
Text and Numeric

Text Area and Word Editor
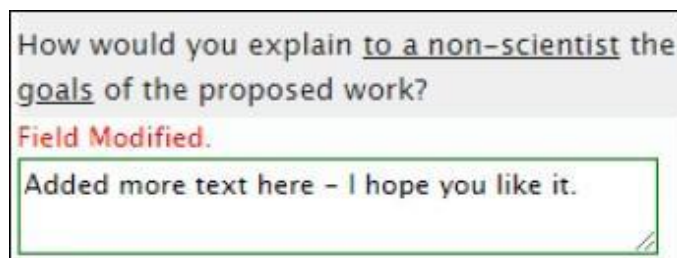
Radio Buttons

A **No** is switched to **Yes**.

Drop-down Lists

Research is replaced with **Applied**.

Checkboxes
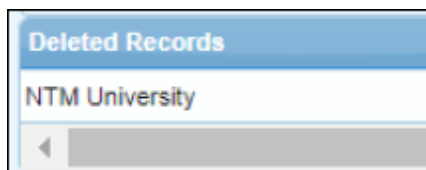
A **No** is switched to **Yes**.

New Record

Icon indicates record has been added.

Record Removed

Records which have been removed from a grid are indicated in a Deleted Records grid, right below the original grid.

Changes to Animal Numbers

Any changes to the USDA Categories grid are reflected in a new grid named Revised Records. This grid displays under the USDA Categories grid and indicates what has been removed, changed and added.

Page Removed
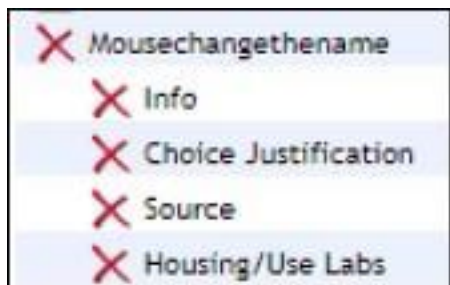
Pages deleted from a protocol are reflected with a red X in the TOC.

Using Full Document Review

The Full Document Review (FDR) allows the reviewer to view the entire protocol at once.

While in review mode, click on the Full Document Review button found in the Review Pane.
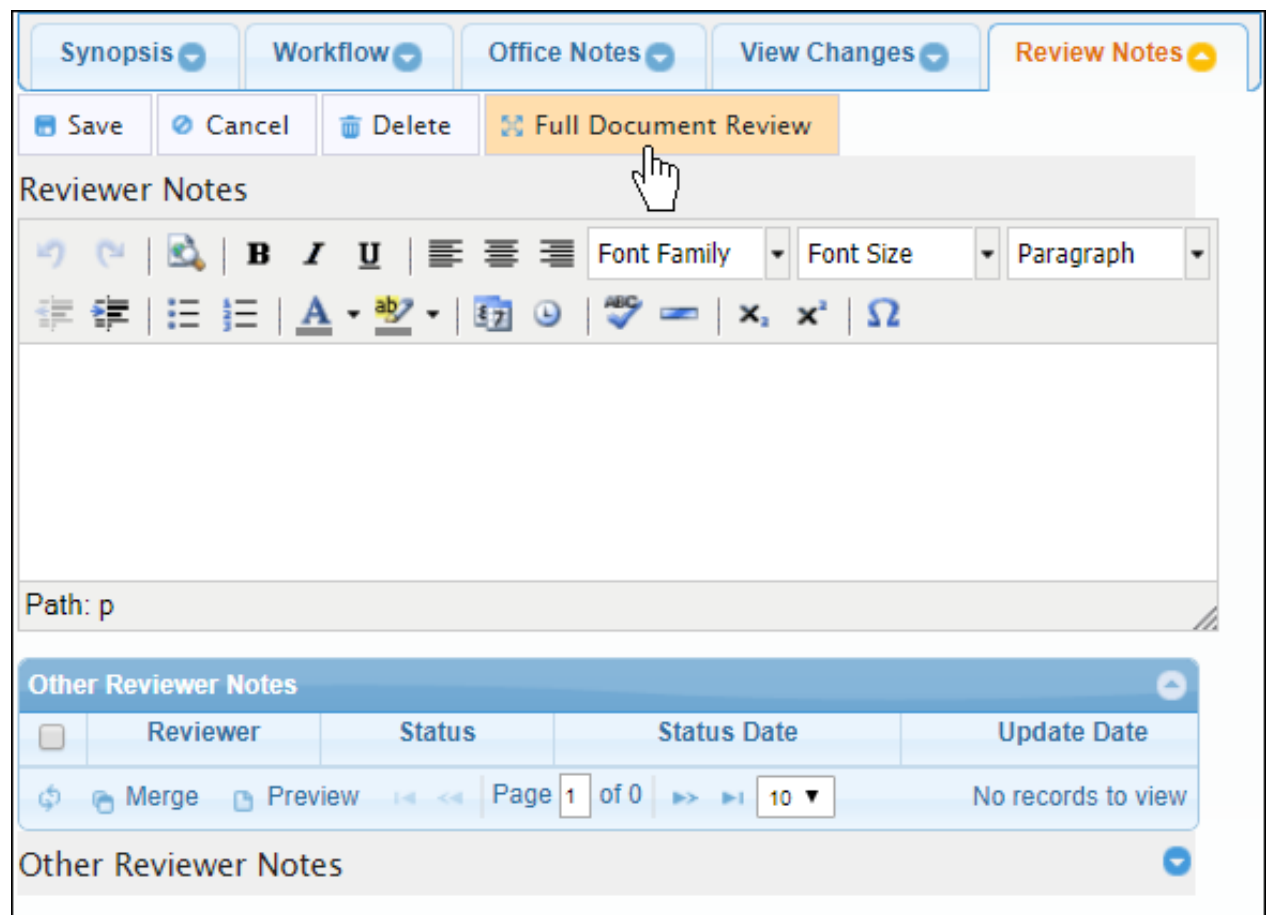
A new window will open the full document review:

- Multiple reviewers can use the FDR feature simultaneously.
- As reviewer's comments are saved on the FDR, reviewers can see these comments via the protocol. In other words, all comments made via Full Document Review are synchronously available to view via the protocol review.
- As reviewer's comments are saved on the protocol, reviewers using the Full Document Review feature can view them by refreshing the page.
- Icons display indicating where revisions and updates have been made.
- Footnotes can only be used in the protocol, not in Full Document Review.

Document Layout

Full Document Review will open to the Table of Contents.

Enter review notes in the My Notes area within every section. Click Save if available.

Reviewer notes are automatically saved. The pin icon is used to pin the note to the top of the document. These icons allow the user to view and write on the review section as they scroll through the document.

As different reviewers enter their review notes, the notes display in the Reviewer's Notes tab.

Review Icons

- **One head:** Page has only been reviewed by you.

- **Two heads:** Page has been reviewed by other committee members.

- **Three heads:** Reviewer's comments have been merged by IACUC coordinator into one comment.

· **Pencil:** PI has revised a page which was not marked for review.

- **Check mark:** PI has completed a page marked for his review.

- **New record:** PI added a new record to a multi-grid page during review.

Comparing Protocol Versions (Important for Amendments)

For amendments, it is important to view all changes that have occurred during the amendment cycle. The Review mode and Full Document Review only display the last round of PI edits, or revisions. Most reviewers prefer to have this side-by-side comparison open in a separate window or on a separate screen while conducting the review. Reviewers can add comments within the Review mode on the amendment while looking at this on another screen.
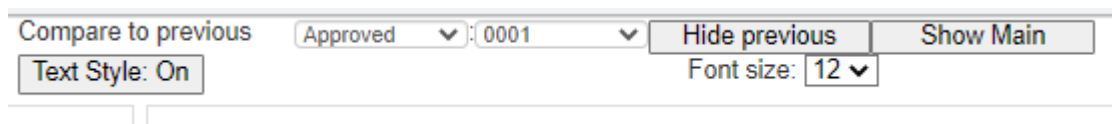
1. In the Table of Contents, click on **Preview Protocol**.
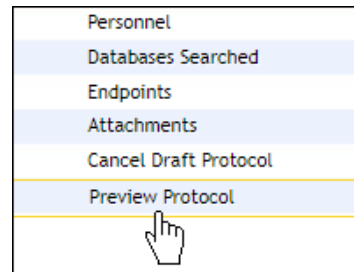
2. Beneath Options, click on **Preview**.
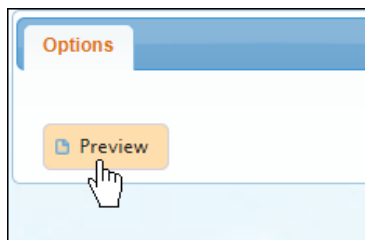
3. A new window will pop up containing the protocol. At the top of the protocol, use the **Compare to previous** drop-down menu to choose the two versions to compare. To compare the current version of the amendment with the last approved version of the protocol, select 'Approved' and then select the highest version available. The highest approved version is the latest approved version of the protocol.

A side-by-side view of the previous version and changes will populate. Sections that have been changed will be bordered by orange, and specific changes will be highlighted red and green.