Getting Started with IDEATE: New User Guidance

1. **IDEATE Log-in Instructions:**
   a. **FIRST TIME USERS:** Email ideate@cuny.edu with the following (Once a profile has manually been created for you, you will be notified. Please allow 24 to 48 hours for your profile to be created):
      i. CUNY role (faculty/adjunct faculty/ full-time staff/post-doc student)
      ii. CUNY campus affiliation (i.e. Queens College)
      iii. CUNY email address
      iv. CUNY Portal Username
   b. **USERS WITH EXISTING PROFILES:** Log into the IDEATE website by using your CUNY Portal credentials
   c. If you do not remember your CUNY Portal Log-in information, please reset your password and login again using your CUNY Portal credentials. If you continue to have difficulty logging-in, please email ideate@cuny.edu *(Subject: IDEATE Log-In Issue)*

2. **Check Your User Profile within IDEATE:**
   a. Click on “Manage” link on the top of the page
   b. Then click on “My User Profile”
   c. Ensure that all information (Name, Campus Affiliation, Email, etc.) in your profile is correct. If your User Profile contains incorrect information, please email ideate@cuny.edu *(Subject: IDEATE User Profile Update)*.

3. **Create New IRB Application within IDEATE:**
   a. Click on “Create New” from the menu bar at the top of the LiveList Screen
   b. Then click on “IRB Application”
   c. Enter the Protocol Title of your project in the field provided
   d. Then click on the blue “Lookup” link to select the Principal Investigator
   e. Once you’ve selected the PI for this study, please select the Department by using the drop down box
   f. Click on “Begin Application” once all of the above information has been entered
   g. Complete the entire application to the best of your ability

4. **Adding CUNY-affiliated Research Personnel to the application:**
   a. Click on the blue “Personnel” tab in the IRB Application
   b. Click on the blue “Add” button under the Research Personnel page
   c. Type the Research Personnel’s last name from the Lookup List and select their name
      i. CUNY-affiliated Research Personnel must have activated User Profiles prior to completing this step; otherwise they will not be listed. If they do not appear, please instruct them to follow the instructions in Section 1 above (“FIRST TIME USERS”).
   d. Specify their Role in the study and provide them with the pertinent access levels:
      i. cc: Check this to have the individual copied on communications from the IRB
      ii. Access: Check this to allow the individual to view protocol information from their account
      iii. Signature Authority: Check this to allow the individual to “submit” the protocol on your behalf
   e. All Research Personnel who are added to the protocol will receive an invitation to participate:
      i. **All invitations must be accepted before an application can be submitted**
      ii. Research Personnel can accept the invitation by logging-into IDEATE and selecting the Protocol Invitation task on their To-Do-List (on the left-hand side of the screen)
      iii. Answer all the Conflict of Interest questions and click on “Send Decision”
   f. Please attach their Human Subjects Research (HSR) CITI certificate *(Social and Behavioral training)* in the Attachments page.
5. **Additional IDEATE Guidance:**

   a. Please refer to the IDEATE help documents link for further information:
   

   i. *These documents are proprietary and require a username/password.* Please contact the Office of Regulatory Compliance for username/password access to these documents.