

## Getting Started with IDEATE: New User Guidance

1. **IDEATE Log-in Instructions:** Log into IDEATE (<https://ideate.cuny.edu>) using your CUNY Portal credentials
  - a. If you do not remember your CUNY Portal Log-in information, please reset your [password](#)
  - b. If you continue to have difficulty logging-in, please contact the Office at Regulatory Compliance at [gcorc@qc.cuny.edu](mailto:gcorc@qc.cuny.edu) (*Subject: IDEATE Log-In Issue*)
2. **Check Your User Profile:**
  - a. Click on “Manage” link on the top of the page
  - b. Then click on “My User Profile”
  - c. Ensure that all information (Name, Department, University Status, Email, etc.) in your profile is correct. If Name, Department, is incorrect, please contact the Office of Regulatory Compliance to request profile changes [[gcorc@qc.cuny.edu](mailto:gcorc@qc.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:**
  - 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 their User Profiles by logging-into IDEATE; otherwise they will not be listed. If they do not appear, please instruct them to log-in using their CUNY Portal credentials
  - 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:  
<http://cuny.edu/research/compliance/human-subjects-research-1/hrpp-policies-procedures/how-to-use-ideate.html>.
    - i. ***These documents are proprietary and require a username/password.*** Please contact the Office of Regulatory Compliance for username/password access to these documents.