

## Getting Started with IDEATE: New User Guidance

### 1. IDEATE Log-in Instructions:

- a. FIRST TIME USERS: Email [ideate@cuny.edu](mailto: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](mailto: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](mailto:ideate@cuny.edu) to request profile changes (*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:  
<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.