IDEATE TIPS & FAQs

IDEATE TIPS: The IDEATE Tips below are meant to facilitate submissions and avoid glitches with your application(s).

****IDEATE access**- Ensure that you are using Firefox, as this is the required browser to avoid glitches and/or error messages. Use your CUNY Portal credentials to log-in.

Access level – If a PI wishes to change a research personnel's access level they can do so from the *LiveList* via the *Personnel* Tab. (Only the PI has this capability)
Select the check-box to grant research personnel access to the following:
i. *cc*: Have research personnel copied on automatic email correspondence from the IRB.
ii. *Access*: Allow personnel to view protocol information from their own IDEATE account.
iii. *Signature Authority*: Facilitate the completion of the application by "re-assigning" the protocol to other members of the research team and "submit" the protocol on your behalf.

Back-up Protocol Data – It is highly suggested researchers continuously back-up their IRB protocol information. This can be completed by "printing" their protocol applications as a pdf file and saving the file on their computer or back-up drive.

Characters (@,$,%,^,*) – These characters should not be used within the IRB application or in the document title or file name uploaded in the *Attachments* tab.

CITI certificate(s) – Ideate's drop-down menu, in the *Attachments* tab, does not include 'CITI Certificate' as a document type; as such please use the first option, 'Imported from IRBNet'.

Communications Tab – Approval/Determination letters relevant to the research project can be found under this tab. This is located in the *LiveList* screen.

CUNY Institutional Email Address – CUNY researchers are required to use their CUNY email address for communications related to research in which CUNY is engaged and when registering with online services, databases, cloud services, etc. for CUNY research-related purposes. [Section 3; CUNY Internet or Mobile Technology Based Human Subject Research]

CUNY Personnel – All CUNY research personnel must first log into IDEATE in order to activate their *User Profile*. Not doing so will cause delays when trying to add personnel to applications. Furthermore, all invitations must be 'Accepted' by CUNY research personnel in order to 'submit' successfully.

Cutting and Pasting – Should only be done from a word pad document (plain text) and NOT from a word document. Word pad can be found under "Accessories" in your list of computer programs. (The IDEATE programmers have identified that using word documents to copy and paste causes glitches and/or blank forms due to hidden characters and/or symbols.)

Editing Applications – Be sure that you are making edits and/or adding attachments from the task in the *To-Do-List*, rather than from the *LiveList*. The *LiveList* accepts changes but they will not save into your application that is currently "In development".

Enrollment Number Errors- If you are submitting a Continuing Review or Final Report and notice that the enrollment numbers are incorrect or have changed based on previous submissions, please contact the Office of Regulatory Compliance as there must be an administrative update completed before submission.

Exempt protocols (submitted prior to IDEATE) – These projects were not migrated into IDEATE unless requested during the migration (Nov. 2014—July 2015). If the project is getting ready to expire and you are continuing with the research, you will need to submit a new application into IDEATE.

Expired protocols – If a PI has not responded to HRPP/IRB requests for additional information or modifications, or has not submitted a continuing review or a final report application after 90 days, the HRPP/IRB will close the study. [Section 3.1; CUNY Study Closure Policy]

External Sites – The default list does not include all the added sites. As such, please use the 'Search' feature to locate your external site. If it cannot be found, please email the Office of Regulatory Compliance (qcorc@qc.cuny.edu) to request addition(s). Note, this is done by CUNY central, and as such can take up to 48 hours to be reflected in IDEATE.

Faculty Advisor – Faculty Advisors are responsible for monitoring student and postdoctoral researchers' progress and ethical conduct, as well as ensure the research is being conducted in compliance with applicable laws, regulations and CUNY policies [CUNY Faculty Advisor Responsibilities Policy]. Students have the option to reassign their applications to their faculty advisors for final review prior to submission. Students must give their Faculty Advisors *Signatory Access,* in the *Personnel* tab, to successfully reassign the protocol. Please note that only one person can make edits to the application at any given time.

Funding Sources – The default list does not include all the added sources. As such, please use the 'Search' feature to locate your funding source. If it cannot be found, please email the Office of Regulatory Compliance (qcorc@qc.cuny.edu) to request addition(s). Note, this is done by CUNY central, and as such can take up to 48 hours to be reflected in IDEATE.

Personnel Access- If a PI wishes to change the access level of existing research personnel, this can be done directly from the *LiveList* via *Personnel* tab. (Please note, only the PI has this capability.)

Printing – The application can printed with the updated revisions by the PI directly from the application. Instructions to print from the *LiveList* can be found in FAQ #19 below.

Reminders – Reminders are sent to PIs 90, 60, and 30 days before protocols expire informing PIs to submit for study renewal or closure. These emails are sent to the PIs' email address identified in their *User Profile*.

Saving Feature – Protocol data will automatically be saved as you continue to work through the application. However, you can also manually click on the yellow "Save" button at the top right-hand corner of the application to ensure that the information is saved.

Stamp appears upside-down and backwards – the solution is to take the original file and save it as an image (like a JPG) and then open the image with Adobe and convert it to a PDF.

Status of Submission- From the project's *LiveList*, you can see if it has been submitted successfully, or whether another team member still has it in their *To-Do-List* by clicking into the *Lifecycle Event Manager*. If the 'Status' says, "In development"- it is still with you. (Note, IDEATE does not update this when it has been sent for an IRB review. It will say that is still with the HRPP Coordinator.)

***To-Do-List* Notifications/Communications**- The notifications and/or communications received in your *To-Do-List* can be deleted to avoid a cluttered list. To do so, please click into them and select the 'Delete' option, rather than 'Close' to permanently remove them. Doing so will not affect your project(s).

FREQUENTLY ASKED QUESTIONS

1. **Q: How do I submit a protocol for CUNY UI-IRB review?**
   - **A.** IDEATE is CUNY's IRB-submission software. Log into the IDEATE website (https://ideate.cuny.edu) using your *CUNY Portal* username and password to create an application for IRB review. Only CUNY-affiliated researchers with *CUNY Portal* accounts can access IDEATE.
2. **Q: I can't log into IDEATE even though I am using my *CUNY Portal* username and password. Who do I contact?**
   - **A.** If you are a First Time User, please email ideate@cuny.edu with the following information: 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. Once a profile has been manually created for you, you will be notified. Please allow 24 to 48 hours for your profile to be created.
   - **A.** If you have previously-logged into IDEATE using your CUNY Portal Username and password, and is experiencing difficulty logging-into the IDEATE system, please reset your CUNY portal log-in and password (https://cunyportal.cuny.edu/cpr/authenticate/portal_login.jsp). Once you have reset your CUNY portal credentials, please try to log into IDEATE again. After completing this, if you continue to experience difficulty logging into the system,

please email ideate@cuny.edu (Subject*: Ideate Log-In Issue*) with a screenshot of any error message received.

3. **Q: I've logged in to the IDEATE system but my *User Profile* displays incorrect information. How do I get my *User Profile* information corrected?**
   - **A.** Please ensure that your IDEATE User Profile information is correct by clicking on the *Manage* button at the top of the *LiveList* screen. If you encounter incorrect information, please contact the Office of Regulatory Compliance at qcorc@qc.cuny.edu (Subject: *Incorrect Ideate user profile information*). Please send us a screenshot of your user profile and tell us what the correct information should be so it could be forwarded over to CUNY to be corrected.
4. **Q: How do I create an application in the Ideate system?**
   - **A.** To create a new application in the Ideate system, please click on the "Create new" link at the top of the *LiveList* screen.
5. **Q: I am trying to add CUNY-affiliated Research Personnel to my IDEATE application. However, my staff is not showing up in the system. How do I add them to the *Personnel* tab?**
   - **A.** Only CUNY-affiliated researchers with CUNY Portal accounts can access IDEATE and be added to a protocol. CUNY Personnel who have never logged into IDEATE before, should email ideate@cuny.edu with the following information: 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. Once a profile has been manually created for them, they will be notified. It takes approximately 24 to 48 hours for profiles to be created.
   - **A.** Once an IDEATE User Profile has been created for a CUNY research personnel, you will be able to add them to the *Personnel* tab of the IRB application. Please ask them to review their *User Profile* to ensure that all their information is correct before adding them to your application.
6. **Q: I added my Faculty Advisor and/or CUNY-affiliated Study Personnel to the protocol, but they did not receive an invitation to *accept*. How do they accept the invitation to be listed in the protocol?**
   - **A.** Ensure that all Study Personnel are added in the *Research Personnel* page. Any personnel added in the *Other Personnel* section of the Personnel tab will not receive an invitation to confirm participation.
   - **A.** When you add someone to the *Personnel* tab, they will automatically receive an invitation to join the protocol. If that person cannot find the invitation on their *To-Do-List*, please provide your Faculty advisor or Study Personnel with the protocol number and request that they scroll carefully through their *To-Do-List*. Note that the most recent notifications will appear at the bottom of the list. Depending on how many protocols are in that person's list, they may not see yours at first glance.
7. **Q: I am unable to add my Co-PI from another institution. How do I add this person to my application?**
   - **A.** All non-CUNY affiliated Research Personnel should be added in the *Research Sites* tab as *External Sites*. Please ensure to attach their institutional IRB approval letter or IRB Authorization Agreement to the "Attachments" tab.

8. **Q: I want to add a Non-CUNY affiliated Research member to the protocol, however they are not affiliated with any other institution. How do I add this person to my application?**
    - **A.** If you are adding a non-CUNY affiliated Research member to the protocol and they are not affiliated to any institution, please contact the Office of Regulatory Compliance at qcorc@qc.cuny.edu for further guidance (Subject: *Non-Affiliated Investigator*).
9. **Q: There seems to be an issue with personnel not receiving invitations to join protocols if they've been added to the *Other Personnel* tab.**
    - **A.** *Other Personnel* would not receive an invitation to be on a project because they are not granted or require the same level of access in IDEATE as Research Personnel.
10. **Q: I am a Student Researcher trying to grant my Faculty Advisor access to review my IRB application. How do I do this?**
    - **A.** Faculty Advisors are responsible for monitoring student and postdoctoral researchers' progress and ethical conduct, as well as ensure the research is being conducted in compliance with applicable laws, regulations and CUNY policies. Please ensure to give your Faculty Advisor all three access levels in the *Research Personnel* page (i.e., *cc*; *Access*; and *Signatory Authority*).
    - **A.** After granting your Faculty Advisor all three access levels, if your Faculty Advisor is unable to view your protocol from their account, you have the option to reassign the application to them for final review prior to submission. Once your Faculty Advisor has reviewed the protocol, you could reassign it back to yourself for final submission.
11. **Q: I have determined that another institution is engaged with the research, but the name of that institution does not appear when I search for it in the *External Sites* list. How do I get this site added into the IDEATE system?**
    - **A.** To add an engaged or collaborating site to your application within IDEATE, please email the Office of Regulatory Compliance at qcorc@qc.cuny.edu and list all the engaged sites that need to be added into the system. Please allow one to two business days for this request to be processed. Once the sites have been entered into the system, you will be able to add them to the *Research Sites* page.
12. **Q: I am trying to add a *Funding Source*, but the name of the source does not come up when I search for it. How can I add a funding source?**
    - **A.** A request must be sent to the Office of Regulatory Compliance (qcorc@qc.cuny.edu) in order to add the funding source not currently listed in the list (*Funding* tab). Please allow one to two business days for this request to be processed.
13. **Q: All my edits in the IRB application are not saving, even though I click on the save button. What am I doing wrong?**
    - **A.** To edit your IRB application, please click on the study located under your *To-Do List* on the left hand side of the screen. Please ensure that you are not making the corrections through the *LiveList,* as any edits made to the *LiveList* will not save.

14. **Q: I am trying to add a document in the *Attachments* tab, but it's not uploading.**
    - **A.** Documents with special characters in the file name will not upload correctly in IDEATE. If there are any symbols in the document name (e.g. &, -, #, @, +, etc.), please rename the document and try uploading it again. It is strongly recommended that only Word or PDF format documents be uploaded to IDEATE.
15. **Q: I have completed my CITI certificate training, where do I attach it? I'm unable to access my CITI training on the IDEATE website/user profile.**
    - **A.** CUNY is currently working with the CITI website on transferring over CITI certificates. Until the transfer has been completed, please ensure you update your IDEATE *User Profile* with your CITI username. Additionally, please attach your CITI certificate in the "Attachments" page within your submissions. Please ensure that you are attaching your CUNY Human Subjects Research (HSR) CITI certificate (social and behavioral training). To access the website, please click: https://www.citiprogram.org/.
16. **Q: My study was not transferred over from IRBNet. I am currently in the process of creating a Continuing Review or Amendment Request for the study. How do I get my project transferred into the Ideate system?**
    - **A.** To get the study transferred over into the Ideate system, please ensure that you and all research personnel associated with the study have logged into the IDEATE system. Once you have logged in, please contact the Office of Regulatory Compliance at qcorc@qc.cuny.edu (Subject: *Exempt study transfer*) to have a study shell created. Our office would have to complete an administrative procedure prior to submitting the Continuing Review and/or Amendment Request.
17. **Q: How do I create an Amendment, Continuing Review, or Final Closure Report for my currently active study?**
    - **A.** To create these applications, please access the *Actions* drop down menu located on your study's *LiveList*.
18. **Q: I am currently working on submitting an Amendment Request and Continuing Review at the same time. Could I submit both? Or would I have to submit one prior to the other?**
    - **A.** If your study is close to expiring, please submit the Continuing review first prior to submitting the Amendment Request. Both submissions would be reviewed by the CUNY UI-IRB at the same time.
19. **Q: Isn't IDEATE supposed to notify me of any updates with my currently active studies? I am not getting any notifications.**
    - **A.** IDEATE is currently notifying PIs of the following:
      1. Expiring projects
      2. Outstanding Tasks in your "To Do List" (studies over 30 days)
      3. Letters sent to PI (i.e., decision letters and HSR Research/Not-Research Determinations)

      The best way to stay up-to-date with your currently active studies is by checking your *To-Do-List* regularly within IDEATE to ensure you are notified of any requests for revisions or other matters that require immediate action. Furthermore, please check your IDEATE *User Profile* and verify that the email address listed in your profile is an active CUNY institutional email address that you check regularly. All IDEATE notifications will be sent to that email.

20. Q: How do I print an active protocol?

A. Instructions to print from the *LiveList*:

1) Click on the *Home* button at the top of the screen to return to the *LiveList*.
2) Once you see the *LiveList* screen, click on the protocol number of the study you want to print.
3) Let the *Lifecycle Event Manager* load and then click "view" under *Details* of the most recent Amendment Request submission of the protocol.
(*Note*: If you would like to print the most recent Continuing Review, then click on the most recent Continuing Review submission).
4) A new window will load with the application. Please click on the blue "print" button at the top-right hand corner of the screen.
5) A pdf file will appear or upload to your *Downloads* file (depending on the browser you are using). You will be able to print the pdf file.

21. Q: I am ready to submit my application, but I don't see a *Submit* tab.

A. First, ensure that you are accessing the protocol from the *To-Do-List*, rather than the *LiveList*. Once this is confirmed, check to see if your advisor and all other research personnel have accepted the invitation to join the protocol by viewing the *Current Research Personnel* tab. Please note that all members of protocol personnel, including faculty advisors, who are *engaged* in research, should be listed on the *Current Research Personnel* tab. If you see the word "Pending" next to someone's name, it means that they have not yet confirmed their participation. Please ask them to log-in to IDEATE and click on the invitation to join the protocol from the *To-Do-List* on the left-hand side of the screen. They must "accept" the invitation and answer the Conflict of Interest questions.

22. Q: I am trying to submit my protocol, but I'm receiving a message saying the application is incomplete.

A. The IRB application will not submit the protocol for HRPP/IRB review until you have answered all text fields and uploaded all required documents. Return to the tabs marked with red asterisks to identify which fields are incomplete. If you are unable to identify what the issue is, please email the Office of Regulatory Compliance at qcorc@qc.cuny.edu with a screenshot of the page identified by the red asterisk, so we could troubleshoot further.

23. Q: I think I submitted my protocol, but I'm not sure if it went through.

A. You will know that the protocol was successfully submitted when you are automatically taken to the *LiveList* screen. Please check to see if the protocol is still on your *To-Do-List*. If it is, it means that it was not successfully submitted. Please try again to submit.

24. Q: Do you have any suggestions on how to back-up my IRB protocol data?

A. It is always wise to continuously back-up all the information you have worked on in the IRB application. Here are some suggestions to back-up the data as you continue to work through the IRB application:
a.) Continuously click on the yellow "Save" button on the top left-hand corner of the IRB application.

b.) Periodically "print" the protocol by clicking on the top right-hand corner of the IRB application. The protocol will appear as a pdf file which can be saved in your computer. (The file can be converted into a word file if you need the information in the future.)

c.) Take screenshots of the application and paste them into a word doc.

25. **Q: How do I obtain the login and password to open some of the links within this document?**

A. For a complete list of the IDEATE help documents available to assist you, click the following link: http://cuny.edu/research/compliance/human-subjects-research-1/hrpp-policies-procedures/how-to-use-ideate.html. Please note that these documents are proprietary and require a username/password. Please email the Office of Regulatory Compliance to request the log-in credentials.