eRAP
(Electronic Research Administration Portal)

Reference Guide for Medicine Researchers
(Principal Investigators, Research Team Members)
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What is eRAP?
eRAP stands for: **Electronic Research Administration Portal**

Ethics review and approval of research involving humans must be obtained before any recruitment or data collection occurs. eRAP is an online tool to facilitate this process.

**Recommended Configuration**

| 1) Windows Desktop and Notebook Computers | 2) Mac MacBook and iMac |

The use of mobile devices (iPad, Android tablets, etc.) is not recommended.

**Recommended Internet Browsers**

| 1) Google Chrome | 2) Mozilla Firefox |

Don’t have Google Chrome or Mozilla Firefox? You can download them from the following website:

1) Google Chrome: [https://www.google.com/chrome/](https://www.google.com/chrome/)
2) Mozilla Firefox: [https://www.mozilla.org](https://www.mozilla.org)

The use of Microsoft Internet Explorer, Microsoft Edge and Opera is not recommended.

**eRAP URL**

[https://infoed.is.mcgill.ca/](https://infoed.is.mcgill.ca/)

**Log in**

1. Enter your **McGill Username**
2. Enter your **McGill Password**
3. Click **Sign In**.

**Log out**

1. Click **Logout** from the top-right of the screen.
Dashboard

1 Human Protocol
   Click Human Protocol to create a New Initial Application.

2 Things To Do
   Items that require an action from you will be displayed in this section.

3 Locate My Records
   Click to list all the research projects for which you are the principal investigator (PI).

4 Locate Records
   Click to list the project(s) for which you are a member of the research team.

5 Your name is displayed here.

6 Click Logout to quit eRAP.

My Profile

The "My Profile" tab shows General Information about you (your name, email address, department, etc). We recommend that you don't modify any information here. To correct an error contact, erapsupport@mcgill.ca

Upload a file
You will have to upload several documents (e.g. scientific review, study documentation). It is recommended to format the documents into PDF format before uploading them. To upload:

1. Click Add New.

2. File Name: Type a clear description and version date for the document that you are about to upload.

3. File Upload: Click the icon to upload a file. A new window opens. Click on Choose File to select a file on your computer.

4. Click . New icons will appear:
   The glasses icon lets you view your document. If you picked the wrong document, click to delete the document. Click to upload a new document.
Create and Submit a Research Ethics Application

2. From the eRAP login page, enter your McGill Username and Password. Click Sign In.

💡 TIP: SAVE your progress OFTEN. The Save button is located at the top right of the eForm. Sections with asterisks are mandatory.

3. To start the creation of a new application, click the Home tab and then click Human Protocol.

4. Click Initial Application from the Create New section. The Initial Application opens.

5. All the different sections of the eForm appear in red on the left-hand side. Click Next to go from one section to another. Click Save from the top-right corner often to avoid losing your work.

📝 NOTE:
➢ Make sure to read all the questions carefully and answer all mandatory questions (indicated by *).
➢ You will be required to upload all the required documents (e.g. scientific review, study documentation). Ensure that you have these documents (in PDF format) before you start filling in the application.
➢ You have 2 options when filling in the eForm sections:
   Option 1: Click on each section and click Next to go to the next section.
   Use Previous to go back to the previous section.
   Option 2: Click on the “All Pages” section from the left-hand side and scroll down to fill out each section.
➢ You will need to save your progress regularly as you move through the application.
   Click Save from the top-right corner of the webpage to save your progress and continue.
➢ To work on this application at a later time, remember the Protocol # and/or the exact study title.
**Instructions**

6. This section contains information on how to fill out the application. Your name, date/time displays at the top-right. Click to go to the next section or scroll down to the other sections.

---

**General Information**

This section contains the **Protocol #** created for you. Enter the title of your study here.

7. **Protocol #**: displays the protocol number that is automatically assigned to the study.

8. **Study Title**: remove the pre-populated text and type in the title of your study.

9. For the question regarding your affiliation with the Faculty of Medicine or Dentistry, click on the down-arrow and select ‘Yes’.

10. Click to go to the next section or scroll down to the other sections.

---

**Access to Edit Application**

Your name is displayed as the Principal Investigator (PI). The PI checkbox is checked.

11. **If you are not the PI**, you must add the PI here and check the box that identifies this person as the PI. To add the PI or to add a person who will be able to view and edit the application (eForm):
a. Click **Add New**

b. Type the first and/or last name of the PI in the **Personnel Listing** box.

   ![Personnel Listing](image)

   **Joanne**

   ![Select](image)

   ![Close](image)

c. Click on the person’s name and click **Select**.

   ![Personnel Listing](image)

   **De Rose, Joanne - 150905591 - Office of Sponsor**

   ![Select](image)

   ![Close](image)

d. The person’s name will be added. The **Email Communications** field is set to ‘**cc in ALL Communications**’ *(this means that an email is sent to this person when changes are made to the application)*. To change this, click on the down-arrow to select ‘**Do NOT cc in Communications**’. **Click the checkbox to add them as PI**.

   ![Email Communications](image)

   **De Rose, Joanne**

   ![Principal Investigator (PI)](image)

   ![Partner Investigator (PI)](image)

   ![Email Communications](image)

   **cc in ALL Communications**

   ![Down-arrow](image)

   ![Do NOT cc in Communications](image)

   ![Checkbox](image)

e. Remember to periodically click **Save**.

   ![Save](image)

   **NOTE:** Click **Delete** to remove a person’s access to the application. If they are the PI, you will have to designate someone else as PI first. Then click **OK** to confirm the delete.

   ![Delete](image)

   ![OK](image)

12. Click **Next** to go to the next section or scroll down to the other sections.

**Research Personnel**

List all co-investigators, collaborators, student researchers. Indicate their name, affiliation, their role in the study, email and department.

13. For each research personnel:
   a. Click **Add New**
   b. Fill in all the information.

   ![Add New](image)

   **Smith**

   ![First Name](image)

   **Mary**

   ![Affiliation](image)

   **McGill University**

   ![Role on Project](image)

   **Co-Investigator**

   ![Email](image)

   **mary.smith@mcgill.ca**

   ![Department](image)

   **Family Medicine**

14. Click **Next** to go to the next section or scroll down to the other sections.
Funding
15. Click on the down-arrow to indicate if the study has financial support.
   a. If the study does not have financial support, select ‘No’.
   b. If the study’s financial support is ‘Requested/Pending’, indicate the expected date of the decision and whether you intend to proceed with the study in the absence of funding.
      ![Funding form](image)
      15b
   c. If the study has financial support, select ‘Yes’ and
      • Click on the down-arrow to indicate who will administer the study funds.
      ![Funding form](image)
      15c
      • Click Add New to add each source of funding (enter Sponsor, Fund #, Fund Title, PI)

16. Click Next to go to the next section or scroll down to the other sections.

Research Ethics Training & Reviews
17. Click on the down-arrow to indicate it you have completed the CORE Tutorial. Note: this or an equivalent course is required to complete prior to submitting an application for ethics review.
   ![Research Ethics Training & Reviews](image)
18. Click the down-arrow and select ‘**Yes**’ to indicate that the study has received a scientific review.

**NOTE:** this is required at the time of submission. If you select ‘**No**’, you are informed that the study will not receive an ethics review until an appropriate scientific review is submitted.

- a. Indicate who conducted the scientific review.

To upload the scientific review form or a copy of the funding agency review:

- b. Click on the 👉 icon to upload a file. The following displays:

- c. Click on **Choose File** to select a file on your computer (double-click the file to select it).

- d. Click **Upload**. New icons will appear:

  The glasses icon 👀 lets you view the document. If you picked the wrong document, click ✗ to delete the document. Click 👉 to upload a new document.

19. Fill out the “**Other Ethics Reviews**” section.

20. Click **Next ➔** to go to the next section or scroll down to the other sections.

**Study Information**

21. Fill in all the “Study Information” (e.g. study scope, McGill-affiliated hospital sites, external sites, type of study, sample size, study population, ethical issues and a description if an issue exists).

22. Click **Next ➔** to go to the next section or scroll down. ⚠️ Don’t forget to regularly click **Save**.

**Recruitment**

23. Click on the down-arrow to indicate if the study involves recruitment of human study participants.

- a. If you select ‘**Yes**’, you will have to explain how potential participants are identified and/or recruited to the study.

- b. If you select ‘**No**’ and the study involves professionals and other non-patient groups, you will have to select ‘**Yes**’ and complete the sections for recruitment and consent.

24. Click **Next ➔** to go to the next section or scroll down to the other sections.
Consent Process
25. Enter the text to describe the consent process.
26. Click the down-arrow to indicate if there is a relationship between the study participants and the person obtaining consent and/or the PI.
   a. If you select ‘Yes’, you will have to explain the nature of the relationship and the steps taken to avoid the perception of undue influence.

27. Click Next to go to the next section or scroll down to the other sections.

Risk/Benefit Assessment
28. Fill in the questions regarding risk/benefit assessment.⚠️ Don’t forget to regularly click Save.
29. Click Next to go to the next section or scroll down to the other sections.

Confidentiality & Data Security
30. Fill in the questions regarding confidentiality and data security.
31. Click Next to go to the next section or scroll down to the other sections.

Conflicts of Interest
32. Click the down-arrow to indicate if there are any conflicts of interest to disclose.
   a. If you select ‘Yes’, you will have to describe the details for the conflicts of interest.
33. Click Next to go to the next section or scroll down to the other sections.

Upload Study documents
34.⚠️ Upload all the study documents here (study protocol, consent and assent forms, recruitment materials, questionnaires, and any other materials distributed to study participants).

For each document: (note that the result will display a list of all the study documents)
   a. Click Add New from the Document Uploads section.

   b. Type a description for the document in File Name.
      (e.g. Consent form)

   c. Click on the icon to upload a file. This displays:

   d. Click on Choose File to select a file on your computer. (double-click the file to select it)
   e. Click Upload. New icons will appear: File Upload: on to select a file on your computer.
      The icon lets you view the document. If you picked the wrong document, click to delete the document. Click to upload a new document.

35. Click Next to go to the next section or scroll down to the other sections.
Submission Approval

36. If you are ready to submit, obtain the Department Head Review. Click on the down-arrow to select one of 2 options:

- Advance this submission to the Department Head for their electronic approval in this system.
- Attach the signed approval: click “this form” link to download a copy of this form. Print it and have it signed by the Department Head. Once you obtain the signature, re-scan the form, save it on your computer as a PDF, and follow the steps below to upload the PDF file:

a. Click 📂 to upload this signed form to this application.

b. This displays:

c. Click on 📂 to select a file on your computer.

d. Click 📂. New icons will appear:

The 📂 icon lets you view the document. If you picked the wrong document, click ✗ to delete the document. Click 📂 to upload a new document.

37. Indicate if you are the Principal Investigator (PI) for this study.

a. If you are the principal investigator, indicate this by selecting this response:

The PI approval is required. You have two options:

a. Advance this submission to the PI for electronic approval within this system.
   The PI will receive the application electronically through eRAP. The PI can then either submit it to the REB Medicine Office for review, or return it to you for modifications.
b. Attach the signed approval: get a signed copy of the PI Assurance Statement and attach (upload) it. You will then submit the application to the REB Medicine Office.

Click 📂 to attach a signed approval to this eForm.

Click on Choose File to select a file on your computer.

Click 📂. New icons will appear:
The 📂 icon lets you view the document. If you picked the wrong document, click ✗ to delete the document. Click 📂 to upload a new document.

Save, Lock and Submit Application
⚠️ Once you have finished creating the application, follow the steps below if you are the PI, or have attached the PI’s signed approval (step 37b above). Use the buttons from the top of the application.

If you advanced the application to the PI for electronic approval (step 37a above), the PI will review the application and decide to send it to the REB Medicine Office or return it to you for modifications.

38. ⚠️ Click 📂 to save the application.

39. ⚠️ Check ✅ to lock the application and prevent further modifications. eRAP will verify that you answered all the required questions and uploaded all the required documents.

If you missed a mandatory question or a required document:

a. The application remains unlocked. eRAP will display an error message. Click OK.

b. eRAP will display the question(s) you missed. Ignore the Page number indicated. Click on the question to automatically be brought to it. Click ✗ to close this window.

c. Answer all the mandatory questions and/or upload all the required documents.

d. ⚠️ Click 📂 and check the Locked field 🗝.

40. ⚠️ Click 📂 to submit the application to the REB Medicine office. The eForm will close.

You are back at the main eRAP page.

NOTE: You will receive an email confirming your submission to the REB Medicine Office. The REB Medicine Office will also get an email to perform REB intake for this application.
What’s next? Pre-Review

The REB Medicine Office will conduct a Pre-Review of your Initial Application and will determine the course of action:

REB Medicine Office returns the application to you for modifications

➔ You will receive two emails from the REB Medicine Office with clarification on what you need to change in order for them to route your application to the reviewer.
  • first email is an automated email titled ‘Pre-Review Modifications Required’
  • second email contains the modifications that are required

Go to the Pre-Review Modifications Required by REB Office section on page 13 below.

REB Office routes your application for review (Delegated Review and/or Board Review)

One of the following could happen:
➔ You receive a Notice of Review.
  You application has been reviewed by the reviewer(s) but it needs modification in order to be approved. The reviewer’s recommendations are included in the Notice of Review. Follow the steps on page 17 for another way to access the Notice of Ethics Review.

Go to the Modifications Required by Reviewer section on page 15 below.

➔ You receive a Certificate of Approval
  Congratulations! Your application has been approved. You receive an email with the subject “Ethics Approval Certificate – REB”. The email will have an attachment in PDF format titled ‘MED Approval Letter”. The email contains the details and the approval period is specified in the Certificate. Follow the steps on page 17 for another way to access the Certificate of Approval.

If the certificate is missing or contains errors, contact eRAP Support at erapsupport@mcgill or call 514-398-7394.

️ NOTE:
  You can always log into eRAP to view the status of your application. See the section titled ‘Application Status’ on page 22 for details on how to do this.
Pre-Review Modifications Required by REB Office

The REB office has returned the application to you. You will have to make these modifications before they submit your application to the reviewer. You will receive two emails:

2. The first email is an automated message and indicates the protocol number and titled: ‘Pre-Review Modifications Required’.

   ![Email Example](image)

   This is an automated message. Please do not reply.
   Information is missing, or further clarifications are required for your protocol REB# 19-08-033 (Study of how listening to music makes you 50% happier). You should receive another email titled “Pre-Review Modifications”. Please review the comments and follow the instructions for next steps.

3. The second email contains the required changes.


5. From the eRAP login page, enter your McGill Username and Password. Click Sign In.

![Login Example]

6. The application to modify will be in the ‘Things to do’ tab with the Subject field = ‘Pre-Review Modifications Required’ status. Click on the Record Number (this is the Protocol number).

![Record Number Example]

7. The Initial Application opens. You may click the Maximize button on the browser to enlarge the viewing screen.

8. Uncheck the Locked field at the top right. This will unlock your application and allow you to make the required modifications requested by the REB Medicine Office.

![Locked Example]

**NOTE for reviewing the application:**

- You have 2 options when reviewing the application in the eForm sections:
  - Option 1: Click on each section from the left-hand side. Click Next to go to the next section. Use Previous to go back to the previous section.
  - Option 2: Click on the “All Pages” section from the left and scroll down to review all the sections.
9. **⚠** Review and update the application. Refer to the **recommendations** in the email you received from the REB Medicine Office.

   a. Make the changes directly to the application (see the Note above).
   
   **⚠** Don't forget to periodically save the eForm by clicking [Save].

   b. If you need to update an uploaded document, delete the existing one and upload a new one. It is best to format the documents into PDF format before uploading them.

   ![Document Uploads]

   i. Click on the [X] icon to remove the existing document. 
      Click [OK] to confirm the delete.


   iii. Click on [Choose File] to select a file on your computer.

   iv. Click [Upload]. New icons will appear: [File Upload:].

10. **⚠** Once you are done making all the modifications, click [Save].

11. **⚠** Check the **Locked** field. 

12. **⚠** Click the **MY ASSIGNMENTS** section from the left-hand side. Click [I am done].

13. The application will disappear from your ‘**Things to do**’ list. It will be submitted to the REB Medicine office. They will receive an email to indicate that this application is available to them.


---

**NOTE:**

The REB Office may return the application to you if they determine that other Pre-Review modifications are required.

When the REB Office believes that your application is complete, they will send it to be reviewed.
Modifications Required by Reviewer

After the REB Office has sent your application to the reviewer, the reviewer may recommend changes. In this case, you will receive an email from the REB Office with the subject “Notice of Ethics Review – REB” with a PDF attachment (Notice of Ethics Review).

1. Open the Notice of Ethics Review attachment file and read the recommendations from the reviewer.

2. From the eRAP login page, enter your McGill Username and Password. Click Sign In.

3. Your application to modify will be in the ‘Things to do’ list with the title Modifications Required. The item description will include the protocol number and study title.

4. Click on the application.

5. The Initial Application window opens.

6. ! Uncheck the Locked field at the top right. This will unlock your application and allow you to make the required modifications.
   a. Refer to the recommendations in the email you received from the REB Office. Make the changes directly to the application. If you need to update an uploaded document, delete the existing one and upload a new one. Click on the icon to upload a file. A new window opens. The file upload box shows up. Click on to select a file on your computer. Click.
   b. Don’t forget to periodically save the eForm by clicking .

7. Click .

8. Click to compare the two versions (the original application and the updated one).
a. From the **COMPARE FROM TO** column, indicate one of the versions to be the **FROM** field and the second version to be the **TO** field. Use the date to facilitate this selection.

b. Click **Go**.

c. A new window opens with the two versions (From and To). Compare the two versions. All additions that you made appear in **blue** and deletions appear in **red**.

d. Close the window by clicking on **X**.

e. You can continue to make changes to your application. Don’t forget to save! Keep comparing the two versions (refer to steps a to d above) until you are satisfied with the result.

9. Once you are done, check the **Locked** field.

10. Click on the **My Assignments** tab. The **Next Step/Decision** field is automatically updated to **Post Modifications Intake (MED)**.

11. **Warning Click **I am done**.

12. The application will disappear from your ‘**Things to do**’ list. It will be submitted to the REB office. The REB office will receive an email indicating that this application is available to them.

13. Click **Logout** to log out.

**NOTE:**
The REB Medicine Office may return the application to you if the REB, delegated reviewers or board determine that other modifications are required.
Where to find Notice of Ethics Review or Certificate of Approval

You will receive emails containing the **Notice of Ethics Review** and/or the **Certificate of Approval**.

This is what the email for the Medicine Certificate of Approval looks like:

![Email example]

You may also log into eRAP to find the **Notice of Ethics Review** and **Certificate of Approval**.

1. From the eRAP login page, enter your McGill Username and Password. Click Sign In.

   ![Login screen]

2. From the top of the eRAP page, click the **Locate My Records** tab. The complete list of your applications displays.

   ![Locate My Records screen]

3. Find your application and click on its **Record Number**. A list of actions display (e.g. Edit, View). Click “**View**” and then click on ‘**Initial Application**’.

   ![Initial Application screen]

4. From the left hand-side, the number of attachments for this application are displayed in brackets. These are also found from the **Attachments** link on the top of the screen. Click on **Attachments**.
5. All attachments (e.g. Notice of Ethics Review, MED Approval Letters) are accessible to view and download from here. Click on the link for the attachment that you want to download. The document will display. Close the document by clicking on x.

You could also download a copy of the "Initial Application" by clicking on this link. Click to close the application.

6. Click from the top-left of the screen.

**PI Approval Required**

If an application was submitted by someone else on your behalf, you (PI) are responsible for reviewing and approving the application for submission to the REB Medicine Office. You (the PI) will receive an email:


2. From the eRAP login page, enter your McGill Username and Password. Click Sign In.
3. In your ‘**Things to do**’ list, find the application that has **Subject = PI Approval Required**. Click on the application from the **Record Number** column.

4. A new window opens. You may click the Maximize button on the browser to enlarge the viewing screen.

5. Click on the **MY ASSIGNMENTS** section from the left-hand side of the screen. Fill in the fields on the screen as follows:
   a. Click on the down-arrow to select the **Next Step/Decision** field. Select one of the following:
      - Select ‘**Modifications Required (RA / Coordinator)**’ to return the application for modifications. Then, click on the down-arrow from the **Assign to** field to select the name of the person that sent you the application.
      - Select ‘**REB Intake Required (MED)**’ to forward the application to REB Medicine Office.

     **NOTE:** You will receive an email confirming your submission to the REB Medicine Office. The REB Medicine Office will also get an email to perform REB intake for your application.

   b. **Do not** enter comments in the **Comments** field. You will have to send an email to the person with details on what needs to be updated.

   c. Click **I am done**.
If you are a Research Team member (e.g. RA, Coordinator) and filled in an application on behalf of a PI, the application may be electronically submitted to the PI for approval. You will receive an email indicating that the application is sent to the PI:

The PI can either:
- return the application to you for modifications
- forward the application to the REB Medicine Office (if there are no modifications required)

If changes are required by the PI, you will receive an email with the Subject field containing the Protocol Number and ‘RA/Coordinator Modifications Required’. The PI will either send you a second email containing the required changes or speak to you directly.


2. From the eRAP login page, enter your McGill Username and Password. Click Sign In.

3. In your ‘Things to do’ list, find the application that has Subject = RA/Coordinator Modifications Required. Click on the application from the Record Number column.
4. A new window opens. You may click the Maximize button on the browser to enlarge the viewing screen.

5. Click on the Record Number for your application. The Initial Application opens. You may click the Maximize button on the browser to enlarge the viewing screen.

6.⚠️ Uncheck the **Locked** field at the top right. This will unlock your application and allow you to make the required modifications that the PI has requested.

   a. Review and update the application according to the PI request. Make the changes directly to the application. Don’t forget to periodically save the eForm by clicking **Save**.

   b. If you need to update an uploaded document, delete the existing one and upload a new one. It is best to format the documents into PDF format before uploading them.

   i. Click on the × icon to remove the existing document. Click **OK** to confirm the delete.

   ii. Click on the 📝 icon to upload a file. A new window opens.

   iii. Click on **Choose File** to select a file on your computer.

   iv. Click **Upload**. New icons will appear:

      - The 👤 icon lets you view the document. If you picked the wrong document, click × to delete the document. Click 📝 to upload a new document.

8.⚠️ Once you are done making all the modifications, click **Save**.

9.⚠️ Check the **Locked** field.

10.⚠️ Click the **MY ASSIGNMENTS** section from the left-hand side. Click **I am done**.

11. The application will disappear from your ‘Things to do’ list. It will be submitted to the REB Medicine office. They will receive an email to indicate that this application is available to them.

12. Click **Logout** to log out.
Create Amendment for Faculty PI, Student PI or RA creating on behalf of Faculty PI

**Note:** ensure that the popup blocker is disabled for this url.

1. Login to eRAP. Click **Locate My Records**.

2. Your protocols display in the **Record Number** field.

3. Find and hover over the **Record Number** of the protocol that requires an amendment.  
   **Note:** Record Status should display as ‘Approved’.

4. Select ‘Create New’ from the flyout menu.

5. Click **Amendment** from the flyout menu. The new amendment form opens in a new window.

**NOTE:**
If the new amendment does not appear in a new window, it is because of the popup issue.

a. You should disable popup blockers for this url.

b. You can access it by hovering over the Record Number and clicking **Edit** and **Amendment** from the flyout menu.
6. The Ethics Submission screen displays. You will be on the Instructions page. Ignore the instructions.

7. From the Tab-Section Menu on the left, click Amendment.

8. The Locked field should be unchecked, and you will see the Amendment tab.

   **Note:** if you do not see the Amendment tab, unlock the protocol by unchecking the Locked field.

9. Fill in the description of the proposed study amendment or modification and the rationale in the box provided. Indicate if it is a minor or major change.

10. Check the boxes that apply for the follow-up action you recommend for study participants already enrolled in the study.

11. Click Add New to add new or revised documents. In these cases, upload these from the popup that displays.

12. Click Next.
13. Click Save.
   a. If there are mandatory questions that you have not filled in, a pop-up appears.

14. Click on the Submission Approval window. Click on the down-arrow to select whether you are the PI or not.

   Note: if you are the student or RA, you should select “I am not the PI” from the dropdown list.

   Click Save.

15. Check the Locked field.

16. Click Submit.

If you are the faculty PI, you will get a message and an email indicating that your amendment application has been submitted to the REB Office.

If you are a student or RA, you will get a message and an email indicating that your amendment application has been submitted to the faculty PI. The faculty PI will review it and send it to the REB Office if no changes are required. If changes are required, the application could be returned to you.

The REB Office will accept the amendment application and process it for review.
Amendment Modifications required
for Faculty PI, Student PI or RA creating on behalf of Faculty PI

If the REB Office wants you to modify the protocol amendment, you and anyone who is indicated to be cc’d on all communications, will receive an email. Then login to eRAP, locate the protocol, and make the required changes.

Note: ensure that the popup blocker is disabled for this url.

1. Login to eRAP. Click Things to Do.

2. You will see the protocol with the title ‘Modifications Required’ for the protocol that you have to modify. Click on this protocol.

3. The Ethics Submission screen displays. Uncheck the Locked field. Make the changes indicated by the REB Office in the email you received from them.

4. Click Save.

5. Check the Locked field.

6. Click the MY ASSIGNMENTS tab.

7. Click ‘I am done’.

The REB Office will review the changes and process it for review.
Create Termination Report

Anyone with edit access on the study can create and submit a termination report.

Note: ensure that the popup blocker is disabled for this url.

1. Login to eRAP.
   - If you are the PI, click **Locate My Records**.
   - If you are not the PI, click **Locate Records**.

2. Find the record number of the study you want to terminate. Hover over the record number and select ‘Create New’ from the flyout menu.

3. Click ‘Termination’ from the flyout menu. The termination form opens.

   **NOTE:**
   If the termination form does not appear in a new window, it is because of the popup issue.
   - a. You should disable popup blockers for this url.
   - b. You can access it by hovering over the Record Number and clicking **Edit** and **Termination** from the flyout menu.

4. Fill out the termination report.

5. Click **Save**. If there are mandatory questions that you have not filled in, a pop-up appears.

6. Check the **Locked** field.

7. Click **Submit**.

You will receive an email indicating that your report has been sent to REB Intake, who will contact you if there are any issues with your report.
Anyone with edit access on the study can create a reportable new information submission.

**Note:** ensure that the popup blocker is disabled for this url.

1. **Login to eRAP.**
   - If you are the PI, click **Locate My Records.**
   - If you are not the PI, click **Locate Records.**

2. **Find the record number of the study for which you want to create a reportable new information submission.** Hover over the record number and select ‘Create New’ from the flyout menu.

3. **Click ‘Reportable New Information’ from the flyout menu.** The Protocol Deviation or Unanticipated Issue form opens.

   **NOTE:** If the reportable new information form does not appear in a new window, it is because of the popup issue.
   a. You should disable popup blockers for this url.
   b. You can access it by hovering over the Record Number and clicking **Edit** and **Reportable New Information** from the flyout menu.

4. **From the drop-down, select if this is a ‘Protocol Deviation’ or a ‘Serious Adverse Event’.**

5. **If you selected ‘Protocol Deviation’, fill in the required fields.**
6. If you selected ‘Serious Adverse Event’, fill in the required fields.

7. Once completed, from the SUBMISSION APPROVAL section, click on the down-arrow to select whether you are the PI or not.

8. Click Save. If there are mandatory questions that you have not filled in, a pop-up appears.

9. Check the Locked field.

10. Click Submit.

You will receive an email indicating that your report has been sent to REB Intake for follow up.
Create Continuing Review

Anyone with edit access on the study can create a continuing review.

Note: ensure that the popup blocker is disabled for this url.

1. Login to eRAP.
   If you are the PI, click Locate My Records.
   If you are not the PI, click Locate Records.

2. Find the record number of the study for which you want to create a continuing review. Hover over the record number and select ‘Create New’ from the flyout menu.

3. Click ‘Continuing Review’ from the flyout menu. The continuing review form opens.

   NOTE:
   If the continuing review does not appear in a new window, it is because of the popup issue.
   a. You should disable popup blockers for this url.
   b. You can access it by hovering over the Record Number and clicking Edit and Continuing Review from the flyout menu.

4. Fill out all the required fields for the continuing review form.

5. For the Status of the Protocol field, click the down arrow and select the appropriate status.

6. From the SUBMISSION APPROVAL section, click on the down-arrow to select whether you are the PI or not.

7. Click Save. If there are mandatory questions that you have not filled in, a pop-up appears.

8. Check the Locked field.

9. Click Submit.

If you are the faculty PI, you will get a message and an email indicating that your continuing review has been submitted to the REB Office.

If you are a Student or RA, you will get a message and an email indicating that your continuing review has been sent to your supervisor / PI. The supervisor / PI will review it and send it to the REB Office if no changes are required. If changes are required, the supervisor /PI could return it to you.

The REB Office will accept the continuing review and process it.
Continuing Review
for Supervisor or PI Approval Required

You will receive an email indicating that either:

a. a student PI has submitted a continuing review for supervisor approval
b. RA has submitted a continuing review for your approval as PI

Then login to eRAP, locate the protocol, and make the required changes.

**Note:** ensure that the popup blocker is disabled for this url.

1. Login to eRAP. Locate the protocol in Things To Do.

2. Click on the protocol number to open the Continuing Review form. This will indicate ‘Supervisor Review Required’ or ‘PI Approval Required’.

   Review the form.

3. If changes are not required, click on MY ASSIGNMENTS.
   a. From Next Step/Decision field, select REB Intake Required (REB).
   b. After the auto-save is complete, click I am done.
4. If changes are required, you have 2 options:

a. Make the changes yourself (recommended) by unchecking the **Locked** checkbox, make the changes, check **Locked** and click **Save**.

From the Next Step/Decision field, select ‘**REB Intake Required (REB)**’. After the auto-save is complete, click **I am done**.

b. Return to the RA for modifications. From the Next Step/Decision field, select ‘**Modifications Required (Student)**’. After the auto-save is complete, click **I am done**.
Legacy amendments are to be used for protocols created before the launch of the eRap submission.

To amend legacy protocols, the following steps are required. Note that you will have to fill out the legacy amendment form and attach the required documents.

**Note:** ensure that the popup blocker is disabled for this url.

1. Login to eRAP. Locate the protocol from the Quick Find box. Press Enter.
   
   Or you may locate the protocol by:
   
   If you are the PI, click **Locate My Records**.
   
   If you are not the PI, click **Locate Records**.

2. Find and hover over the Record Number of the legacy protocol that requires an amendment.
   
   **Note:** Record Status should display as ‘Approved’.

3. Select ‘Create New’ from the flyout menu.

4. Click ‘Amendment – Legacy’ from the flyout menu. The legacy amendment form opens in a new window.

5. Fill in the description of the proposed study amendment or modification and the rationale in the box. Indicate it is a minor or major change.

6. Check the boxes that apply for the follow-up action you recommend for study participants already enrolled in the study.

7. Click **Add New** to upload new or revised documents. In these cases, upload these from the popup that displays.

8. From the **SUBMISSION APPROVAL** section, click on the down-arrow to select whether you are the PI or not. Note that if you are the RA, you should select “I am not the PI”.

9. Click **Save**. If there are mandatory questions that you have not filled in, a pop-up appears.

10. Check the **Locked** field.

11. Click **Submit**.
If you are the faculty PI, you will get a message and an email indicating that your legacy amendment application has been submitted to the REB Office.

If you are a student or RA, you will get a message and an email indicating that your legacy amendment application has been submitted to the faculty PI. The faculty PI will review it and send it to the REB Office if no changes are required. If changes are required, the application could be returned to you.

The REB Office will accept the legacy amendment application and process it for review.
Application Status

After you create an application, there are two different ways to view the status of your application.

Locate My Records
1. Click on the ‘Locate My Records’ tab.
2. Locate your application number from the Record Number field.
3. View the ‘Record Status’ field.

Locate Records
1. Click on the ‘Locate Records’ tab.
2. From the Search ‘Locate’ Criteria screen:
   a. select the ‘Record Number’ checkbox
   b. type your application number in the Record Number field
   c. click Search
3. View the ‘Record Status’ field.
4. To see more details:
   a. Click the Record Number and select View > Master Record for more details.