

How to review and submit an RA drafted application- for faculty PI

SUBMISSION

As faculty PI, you must review and approve your application created/drafted by a Research Assistant, before submission to the REB Office. This applies to new applications, new amendments to an approved application, continuing reviews (renewals), and any revisions to these types of submissions. Once the RA completes and submits the initial submission to you electronically, you will receive an email with the following subject line: **Protocol Number: **-**-*** - PI Approval Required.**

Note: An RA cannot forward revisions to you if any application is returned to you from the REB for changes. They can make changes, but it is in your workflow and stays there until you move it to REB Intake Required. See the Modifications guides for detailed instructions for responding to an REB review.

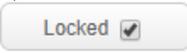
Log into eRAP with your McGill credentials- <https://infoed.is.mcgill.ca>.

Click on the “Things To Do” tab. You will see the application referenced in the email. The heading “**PI Approval Required**” is displayed. Click to open the application.

There are then several options:

1. After review, approve the application as is and forward it to the REB Office. **Important-** ensure that the **Submission Approval** dropdown option is changed from “I am not the PI” to “**I am the PI**”. You will have to unlock to do do this and then check Lock again. Then click on “My Assignments” tab on the left menu. The text in “My Assignments” is a repeat of the email you received. At the bottom of the page, you will see “Next Step/Decision” dropdown box. Choose “REB Intake Required (REB)”. Then, click “I am done” .

2. You may decide that modifications are needed before sending to the REB. This can be done in three ways.

a) *****Recommended***** You make the changes yourself. To do this, you must uncheck the Locked  tab. Once you have made the desired changes, click Save , then check the Locked  tab.

When the required modifications are done, you can forward to the REB. **Important-** ensure that the **Submission Approval** dropdown is changed from “I am not the PI” to “**I am the PI**”. Click on “My Assignments” tab on the left menu. At the bottom of the page, you will see “Next Step/Decision” dropdown box. Choose “REB Intake Required (REB)”. Click “I am done”.

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b) You can tell the RA (e.g., via email, in person) to go in and make the required changes without you having to route it back to the RA. They must let you know when the changes have been completed. **Important-** ensure that the **Submission Approval** is changed from “I am not the PI” to “**I am the PI**”. When satisfactory, click on “My Assignments” tab on the left menu. At the bottom of the page, you will see “Next Step/Decision” dropdown box. Choose “REB Intake Required (REB)”. Click “I am done”

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c) Send it back electronically to the RA to make modifications. To do this, click on “My Assignments” tab on the left menu. At the bottom of the page, you will see “Next Step/Decision” dropdown box.

Choose “Modifications Required (RA)”. Click “I am done” . You must communicate your recommendations to the RA directly (e.g., via email, in person).

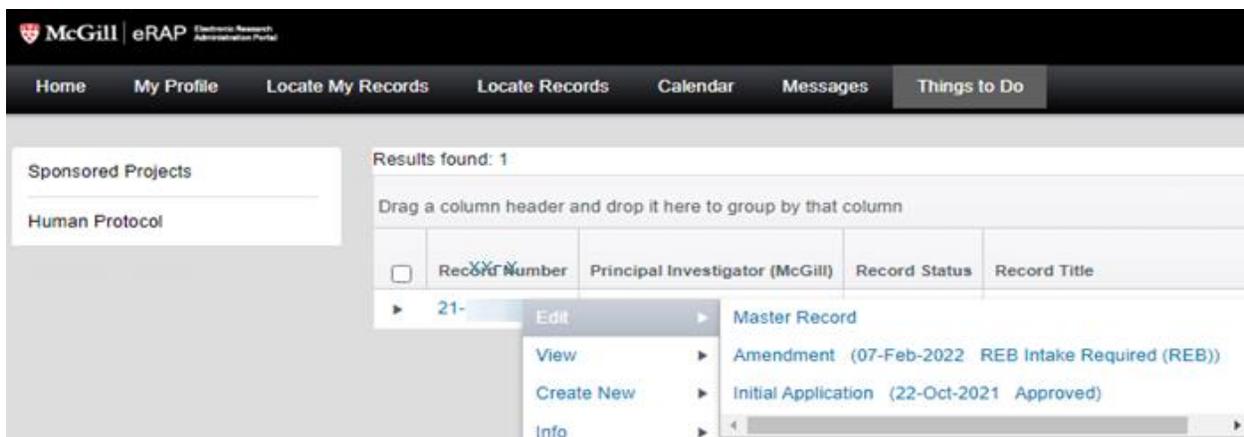
The assignment “[PI Approval Required](#)” will then be removed from your “Things To Do”.

NOTIFICATIONS

As PI you will receive all notifications for modifications and approvals from the REB.. Anyone in the application who is given both Edit access and “cc on all communications” will receive most notifications. Having edit access, the RA can go in and make any modifications in response to modifications requested by the REB. NOTE that they cannot move the revised application to you or to REB Intake, when the changes are in response to an REB request.. As PI, you must do this yourself. Click on “My Assignments” tab on the left menu. At the bottom of the page, you will see “Next Step/Decision” dropdown box. Choose “REB Intake Required (REB)”. Click “I am done”. .

Checking on Submission Status

As PI, you can enter your name or the study title or file number in the Quick Find Box (this won’t work for an RA). Or you can find the record using the Locate Records tab and applying filters as necessary. Hover over the record number with your mouse and select Edit from the flyout menu. Submissions for that record and their current status will be displayed.



The screenshot shows the McGill eRAP interface. The top navigation bar includes Home, My Profile, Locate My Records, Locate Records, Calendar, Messages, and Things to Do. On the left, there is a 'Sponsored Projects' section with 'Human Protocol' listed. The main content area shows 'Results found: 1' and a table with columns: Record Number, Principal Investigator (McGill), Record Status, and Record Title. A record with ID '21-' is highlighted, and a flyout menu is open over it, showing options: Edit (with a sub-menu containing Master Record, Amendment (07-Feb-2022 REB Intake Required (REB)), and Initial Application (22-Oct-2021 Approved)), View, Create New, and Info.

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