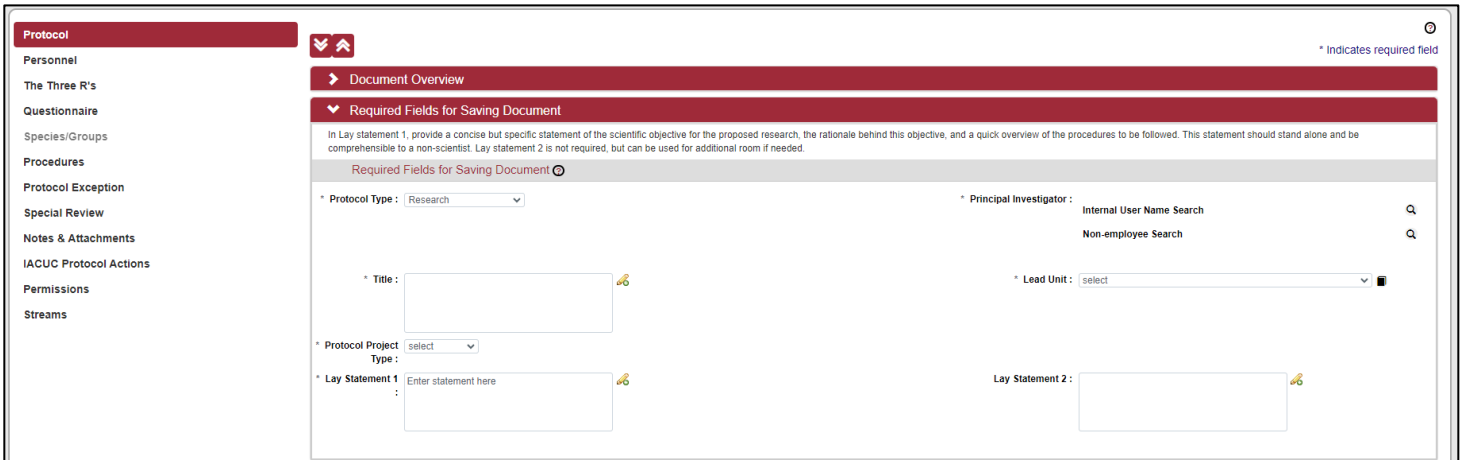


## IACUC: UPDATING THE PROTOCOL TAB

When initiating a new protocol, you will be brought to the **Protocol** tab on the new protocol.

- 1) The **Required Fields for Saving Document** panel will need to be completed before moving on to any other sections or tabs. All fields with an asterisk (\*) will need to be filled out before you can save the protocol.



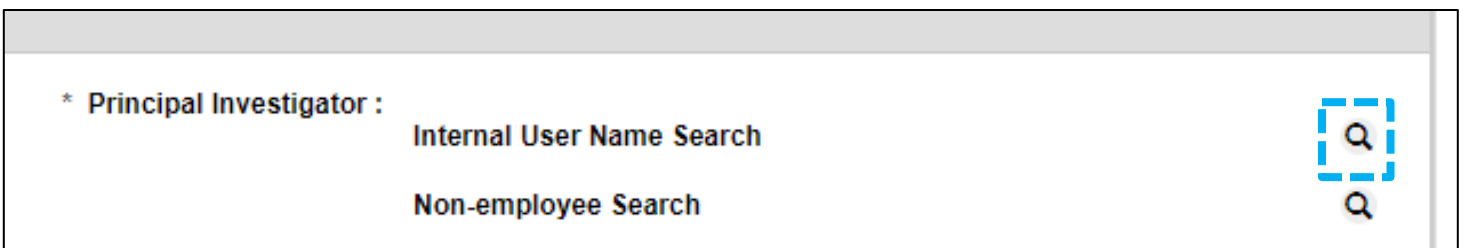
The screenshot shows the 'Required Fields for Saving Document' section of the IACUC Protocol tab. The form includes the following fields:

- Protocol Type:** A dropdown menu with 'Research' selected.
- Principal Investigator:** Two search options: 'Internal User Name Search' and 'Non-employee Search', each with a magnifying glass icon.
- Title:** A text input field with a magnifying glass icon.
- Protocol Project Type:** A dropdown menu with 'select' selected.
- Lead Unit:** A dropdown menu with 'select' selected.
- Lay Statement 1:** A text input field with the placeholder text 'Enter statement here' and a magnifying glass icon.
- Lay Statement 2:** A text input field with a magnifying glass icon.

A note above the form states: 'In Lay statement 1, provide a concise but specific statement of the scientific objective for the proposed research, the rationale behind this objective, and a quick overview of the procedures to be followed. This statement should stand alone and be comprehensible to a non-scientist. Lay statement 2 is not required, but can be used for additional room if needed.'

- a. **Protocol Type** – Select the option that best fits the type of protocol you are submitting.
- b. **Title** – Enter the title of the protocol. This can be modified later, so feel free to use a placeholder.
- c. **Protocol Project Type** – Select the option that best fits the project type for your protocol.
- d. **Lay Statement 1** - Provide a concise but specific statement of the scientific objective for the proposed research, the rationale behind this objective, and a quick overview of the procedures to be followed. This statement should stand alone and be comprehensible to a non-scientist.
- e. **Lay Statement 2** – Optional. Use this box for additional space if you reach the character limit in Lay Statement 1.

- 2) For the **Principal Investigator** field, click the magnifying glass for “Internal User Name Search.”



This close-up shows the 'Principal Investigator' field with two search options: 'Internal User Name Search' and 'Non-employee Search'. A magnifying glass icon is highlighted with a blue dashed box next to the 'Internal User Name Search' option.

- 3) On the **Person Lookup** that opens up, enter the full email address for the protocol's Principal Investigator in the **Email Address** field and click on the **Search** button. After the search loads, click the return value link to add the person into the protocol as the Principal Investigator and return to the **Protocol** tab.

### Person Lookup

Person Id:

First Name:

**Email Address:**

Active:  Yes  No  Both

Campus Code:

Last Name:

User Name:

Office Phone:

Home Unit:

Return Value	Person Id	Full Name	User Name	Email Address	Directory Department	Directory Title (S2S)	Office Location	Office Phone	School	Active
<a href="#">return value</a>	010188916	Dustin Schwartz	djschwar@uark.edu	djschwar@uark.edu	CC012653		L00010791null	479-387-3810		Yes

One item found.

Export options: CSV | spreadsheet | XML

- 4) Back on the **Protocol** tab, the **Lead Unit** field will update to match the unit for the selected Principal Investigator. If needed, you can use the dropdown to modify the lead unit.

**\* Principal Investigator :**

Internal User Name Search

Non-employee Search

Dustin Schwartz

**\* Lead Unit :**

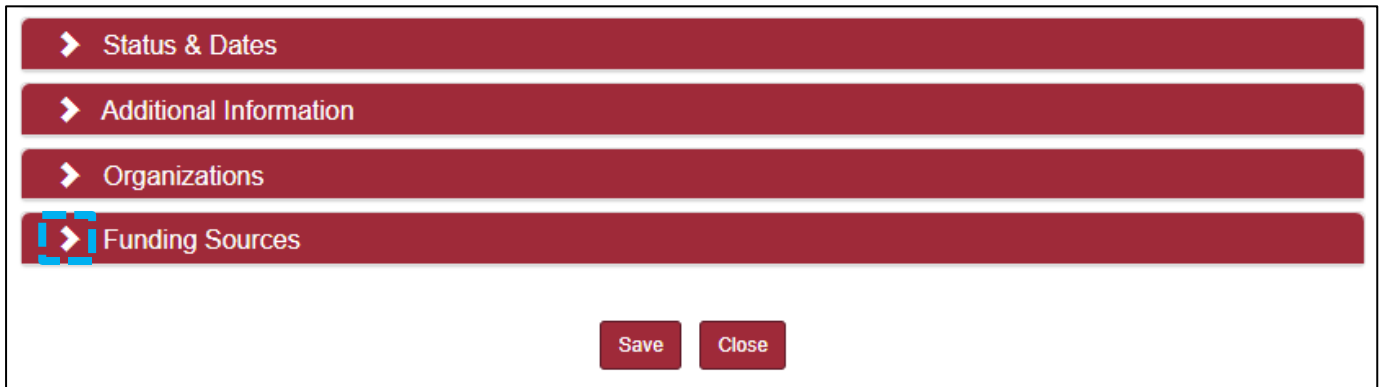
*Note: Once the protocol is saved, the Lead Unit is not modifiable. If a change is needed after adding the PI, be sure to update this field before saving the protocol.*

- 5) Once all required fields have been completed, you can save the protocol using the **Save** button at the bottom of the page or clicking on any of the other tabs listed on the left of the page.

## OPTIONAL: ADDING A FUNDING SOURCE

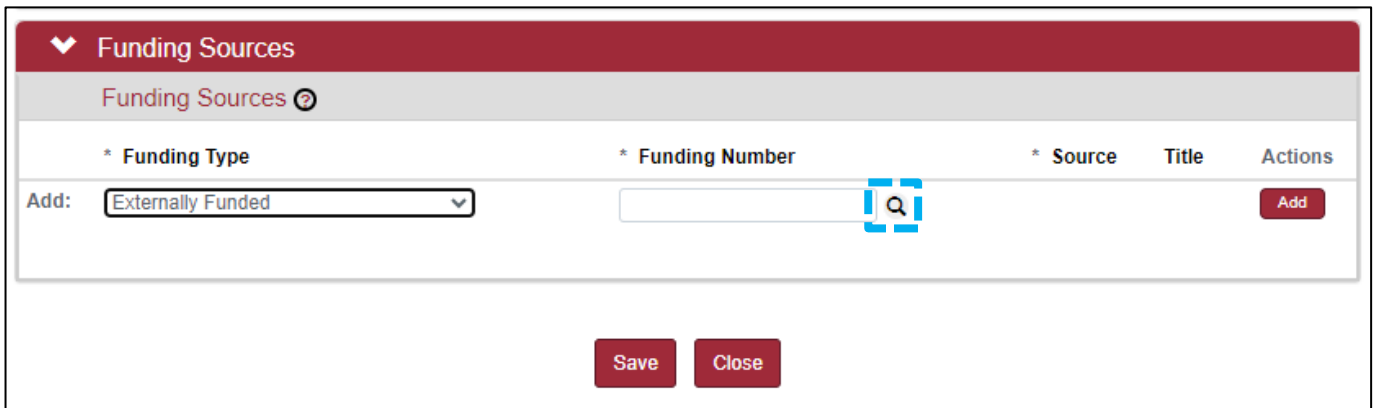
If you have a funding source you would like to link to your protocol, you can add it on the **Protocol** tab under the **Funding Sources** panel.

- 1) Click the > on the Funding Sources panel to expand it.



The screenshot shows a vertical list of four red navigation items: 'Status & Dates', 'Additional Information', 'Organizations', and 'Funding Sources'. The 'Funding Sources' item is highlighted with a red dashed box. Below the list are two buttons: 'Save' and 'Close'.

- 2) Select “Externally Funding” from the **Funding Type** dropdown.
- 3) Click on the magnifying glass icon under the **Funding Number** column.



The screenshot shows the expanded 'Funding Sources' form. At the top is a red header with a dropdown arrow and the text 'Funding Sources'. Below is a grey bar with 'Funding Sources' and a help icon. The main form has a table with columns: '\* Funding Type', '\* Funding Number', '\* Source', 'Title', and 'Actions'. The 'Add:' row shows a dropdown menu with 'Externally Funded' selected, an empty text input field with a magnifying glass icon highlighted by a red dashed box, and an 'Add' button. At the bottom are 'Save' and 'Close' buttons.

- 4) Using the **Institutional Proposal Lookup**, find the proposal you would like to link. The easiest method to search would be to use your name in the **Principal Investigator Full Name** or **All Personnel Full Name** fields while selecting the Contains option link in the image on the next page. Click the **Search** button at the bottom of the page to run the search.

### Institutional Proposal Lookup

Institutional Proposal Number:   
 Proposal Type:     
 Temporary CCN:   
 Unit Name:   
 All Personnel Full Name:    
 Sponsor Name:   
 Prime Sponsor:

Sponsor Proposal ID:   
 Status:     
 Unit ID:     
 Principal Investigator Full Name:   
 Sponsor ID:     
 Prime Sponsor ID:     
 Project Title:

Starts With  Contains  Exact

- 5) Click the **return value** link next to the proposal you want to link to your protocol from the list of search results to return to the **Protocol** tab.
- 6) Click the **Add** button to add the link between your protocol and the proposal.

### ▼ Funding Sources

Funding Sources ⓘ

* Funding Type	* Funding Number	* Source	Title	Actions
Add: <input type="text" value="Externally Funded"/>	<input type="text" value="00000010"/> <input type="button" value="Q"/>			<input type="button" value="Add"/>