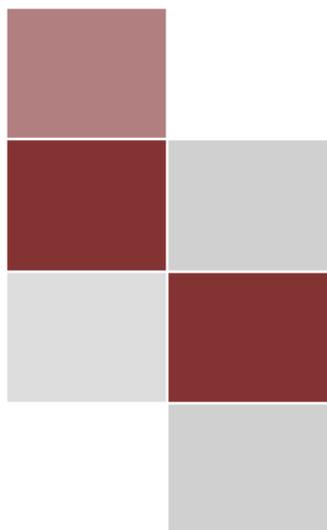




## ILRI Research Compliance Online Platform (Infonetica)

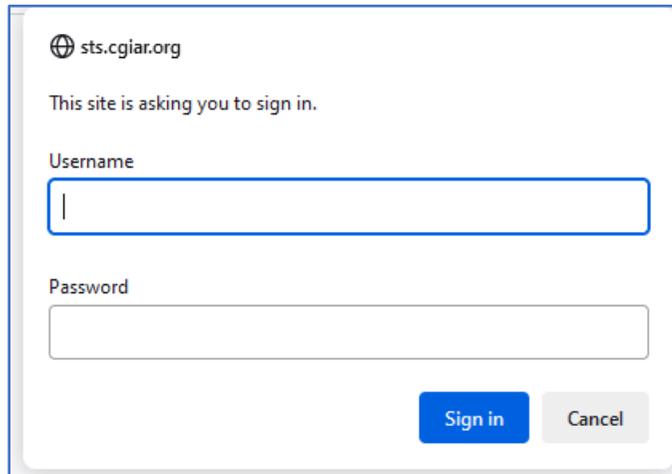
### **LEGACY IREC, IACUC and IBC APPLICATIONS**

### **APPLICANT TRAINING MANUAL**



## Logging into the Research Compliance Online Platform

1. Use the URL link: <https://applicant.researchcompliance.ilri.org/>
2. Select '**University Log-in**' and enter your CGIAR Email address and Password and tap Sign-in, proceed to authenticate



sts.cgiar.org

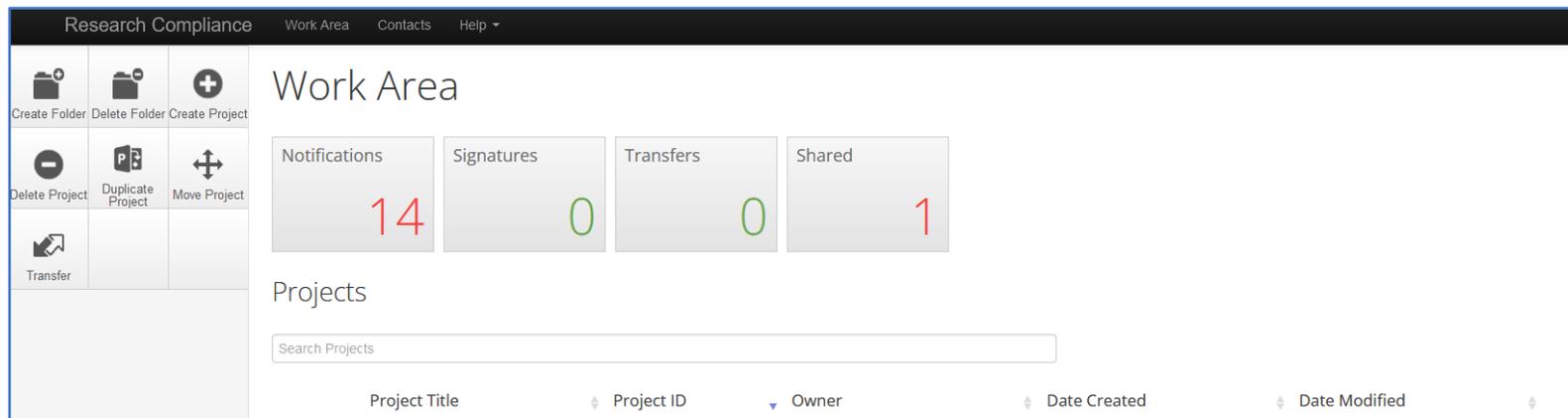
This site is asking you to sign in.

Username

Password

Sign in Cancel

3. Once logged in you should see all the projects which you have entered into the system



Research Compliance Work Area Contacts Help

Create Folder Delete Folder Create Project

Delete Project Duplicate Project Move Project

Transfer

### Work Area

Notifications	Signatures	Transfers	Shared
14	0	0	1

### Projects

Project Title	Project ID	Owner	Date Created	Date Modified
---------------	------------	-------	--------------	---------------

## Legacy IACUC / IREC / IBC Applications

Applicants may wish to submit an IACUC/IREC/IBC Amendment or Renewal application to a form that has been previously approved but is not in the Infonetica Platform. For this situation there is a brief legacy form which should be completed and approved (by the Secretariat) before the applicant can complete the required amendment or renewal sub-form.

Before submitting a legacy IACUC/IREC/IBC form for an activity the Project implementing this activity must have a **completed and approved Research Compliance form**. The Research Compliance form should have indicated that one or more IACUC/IREC/IBC applications are required for this project. If it does not, then the Research Compliance form should be updated<sup>1</sup>; refer to the **'Research Compliance – Research Compliance Application Training Manual'** for how to do this.

If you were not the person who submitted the Project and the research compliance form for the overarching project you will need to ask that person (called the Project Owner) to either:

- a) Follow the steps below to create a legacy form, they then click on the Form title and 'Transfer Form' to you, or

The image shows two overlapping dialog boxes from the Infonetica platform. The top dialog is titled 'Transfer Form To Another User' and contains an 'Email' input field and a checkbox for 'Transfer Sub Forms'. Below the input field are 'Transfer' and 'Close' buttons. The bottom dialog is titled 'Share' and contains a 'Collaborator email' input field with 'JSmith@cgiar.org' entered. To the right of the input field are checkboxes for 'Read', 'Write', 'Submit', 'Share', 'Create all sub forms', and 'Receive notifications'. The 'Read' and 'Create all sub forms' checkboxes are checked. A green '+' button is to the right of the list. At the bottom of the 'Share' dialog are 'Share' and 'Close' buttons. In the background, a grid of icons is visible, with 'Share' circled in green and 'Transfer Form' circled in blue.

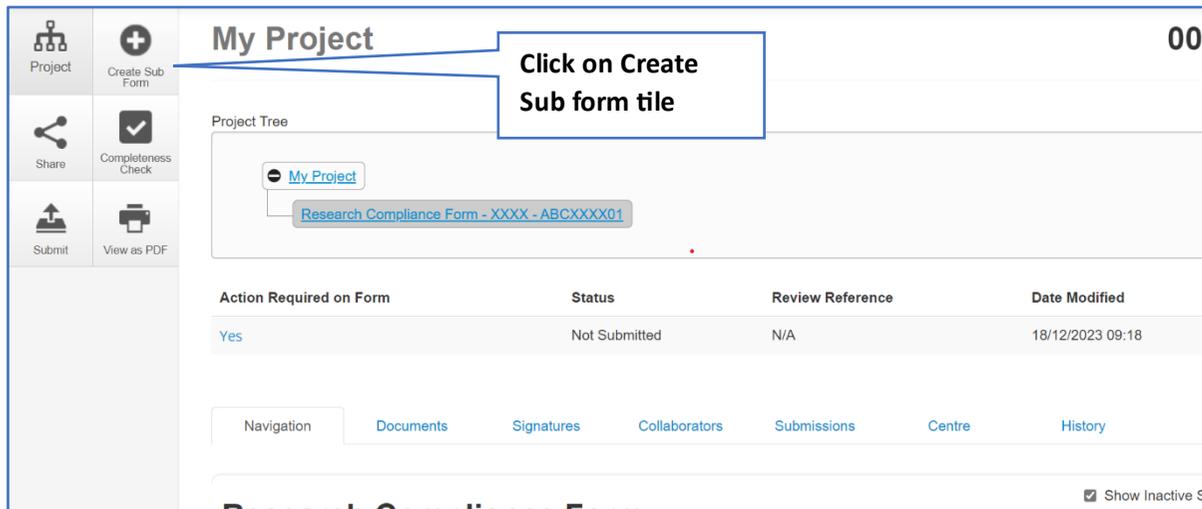
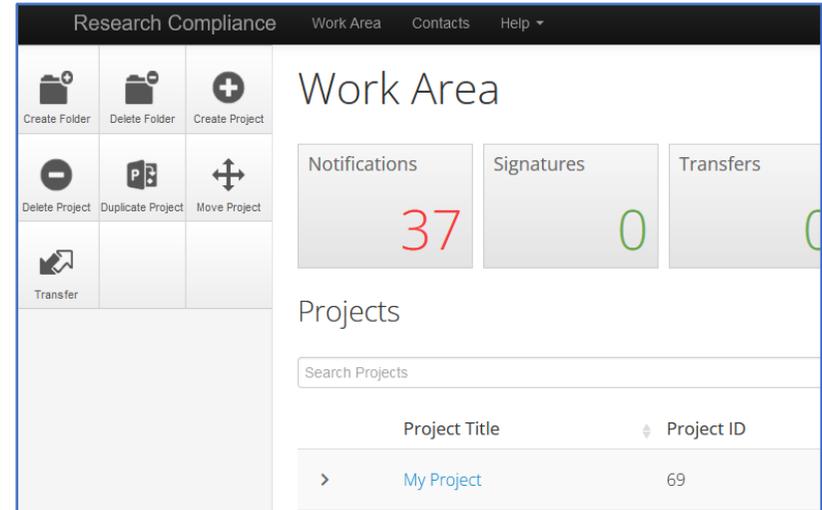
- b) Share the Project Research Compliance Form, and all Sub-Forms with the required access (suggested options shown right – so now you can create a Legacy Form but you cannot edit the main compliance form).

<sup>1</sup> This is not compulsory in order to proceed but keeps the overall project information up-to-date for project colleagues.

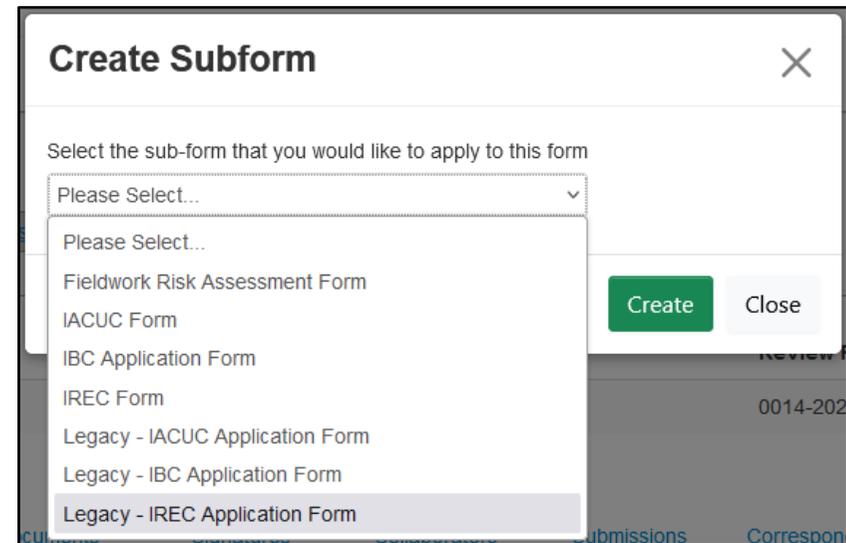
## Completing the Legacy Form

### Creating a new Legacy Form

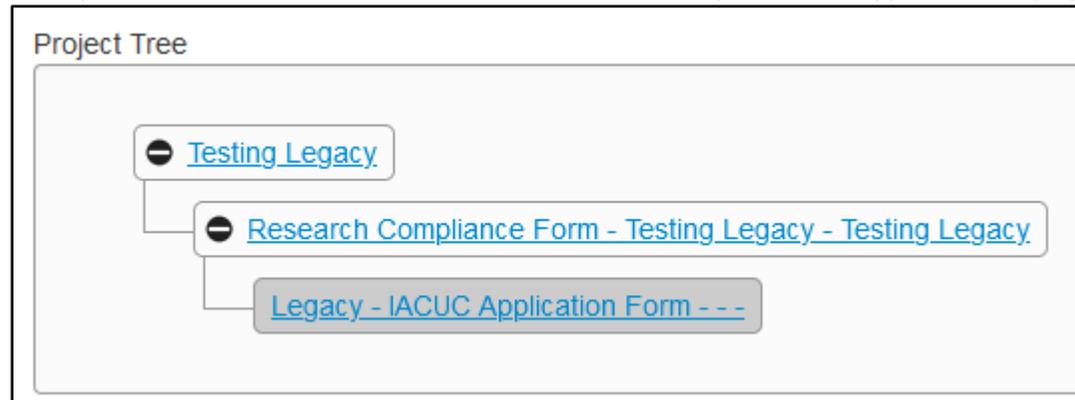
1. In the work area click on the relevant Project.
2. Click on the Research Compliance form in the project tree and then click on the 'Create Sub form' tile.



3. Once you click on the 'Create Sub Form' tile, a new small window will appear. Select from the drop-down menu the legacy form that you would like to apply for and click Create.



4. Once you click create, a sub-form will be created successfully and it will appear on the project tree.



### Completing a legacy IACUC/IREC/IBC form

The next step is to complete the legacy form, minimal information is request to keep the process simple but we want to capture the whole approvals and forms in the system. You can now complete all the relevant questions in the form. To navigate the online form, use the NEXT OR PREVIOUS BUTTONS on the left panel or at the bottom of the page. Note that the form AUTOSAVES.

#### Project Details – Title, Program / Grant Code / PI

For the title please give the title of approved application and the name of the associated program and grant. For IBC you must also enter the Project Title as commonly we only have 1 IBC per project.

**Enter the name of the PI – this will be the person identified in the form and to which approval letters have been addressed.** Note that the PI must have previously logged-in to the platform previously to create their profile.

Note that for all personnel the autofill will only complete fields if they are in your Account Profile. To edit your profile go to your name in the top-right corner and click on Personal Details. Ensure to complete at least Title, First and Last Name, Organisation, Program and Telephone number as these are all compulsory fields for submitting an application.

Click 'NEXT' to go to the next page.

#### Project Activity Detail

Title of Research Activity (experiment, survey or training):  
*This may be experiment, survey or training that involves animals; it could be a whole project or a component within a project. Please keep the title concise as it will be used in the Form Reference throughout the review (max. 100 characters)*

Program Code

Grant Code

### Approved IACUC/IREC/IBC

Enter the approved IACUC/IREC/IBC reference, the approval date (as per the letter), the approved form and approval letter. Click on 'upload document' - browse from the PC to upload the document and click UPLOAD. Note you can upload more than one document although usually here you would have just 1 approved activity form and 1 letter.

For approved amendments or renewals related to the IACUC/IREC/IBC application click on Yes and upload the approved forms and letters.

**Amendments**

Do you have any previously approved amendments?

Yes  
 No

Upload renewal form approval letter(s)  
Enter the approval date for the version date. If your reference includes the number of the amendment and renewal enter the number under Version, otherwise enter 1

[Upload Document](#)

Upload renewal form approval letter(s)  
Enter the approval date for the version date. If your reference includes the number of the amendment and renewal enter the number under Version, otherwise enter 1

[Upload Document](#)

**Renewals**

Do you have any previously approved renewals?

Yes  
 No

Upload approved renewal form(s)  
Enter the approval date for the version date. If your reference includes the number of the amendment and renewal enter the number under Version, otherwise enter 1

[Upload Document](#)

Upload renewal form approval letter(s)  
Enter the approval date for the version date. If your reference includes the number of the amendment and renewal enter the number under Version, otherwise enter 1

[Upload Document](#)

**Activity**

Approved IREC Reference

Approval Date

Upload approved activity form

[Upload Document](#)

Upload activity form approval letter

[Upload Document](#)

As you may have multiple amendments and renewals you are required to enter the date approved (Version Date) and Version (1<sup>st</sup>, 2<sup>nd</sup> etc.) prior to uploading.

**Documents - Approved Amendment Form**

Please attach your Approved Amendment Form here:

Document Name	Version Date	Version	
<input type="text" value="AmendmentLetter1"/> <a href="#">Browse</a> <small>AmendmentLetter1.docx</small>	<input type="text" value="01/07/2024"/>	<input type="text" value="1"/>	<a href="#">Upload</a>

### Endorsements and Signatures

- Click on the check box to confirm you have completed all questions.
- Click on the sign tab for PI signature
- If filing the form on behalf of the PI click on the “request signature” tab and input the PI email for them to sign

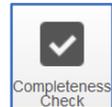
#### Declarations and Signatures

I confirm all questions have been completed

Signature of Principal Investigator / Project Leader

[Request Signature](#) [Sign](#)

Once you click sign or request signature, you will be redirected to a new window titled completeness check (you can also do a completeness check at any time by click on the ‘Completeness Check’ tile) . This page will show sections that have not been fully filled. Click in any of the item and you will be redirected to the section that needs to be filled in. Repeat this for all items on this page and ensure all sections are completed



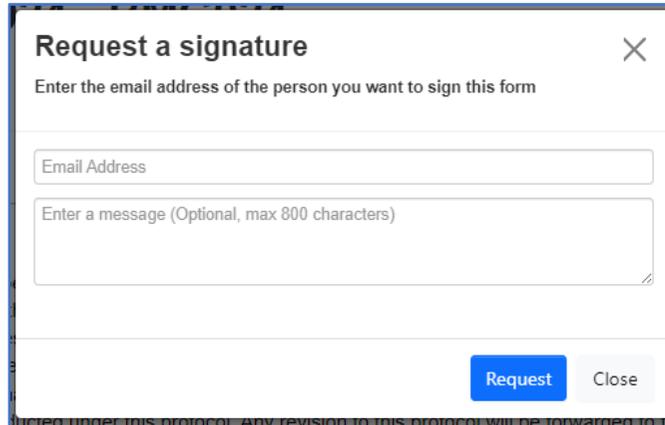
#### Completeness Check

Your form is complete and ready to submit

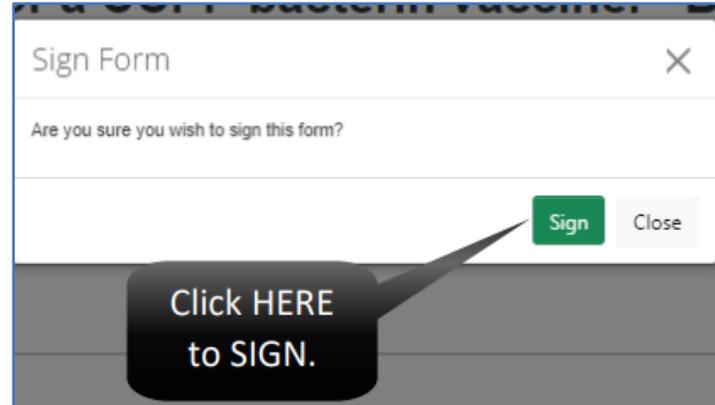
[Submit](#) [Close](#)

Click on the sign tab on the last page for PI signature. A new small window will appear, click on sign.

If you request a signature from the PI you will see a box where you need to add their e-mail address. Note that the PI should already have a profile in the platform, i.e. they have previously logged into the system for them to then follow the instructions.

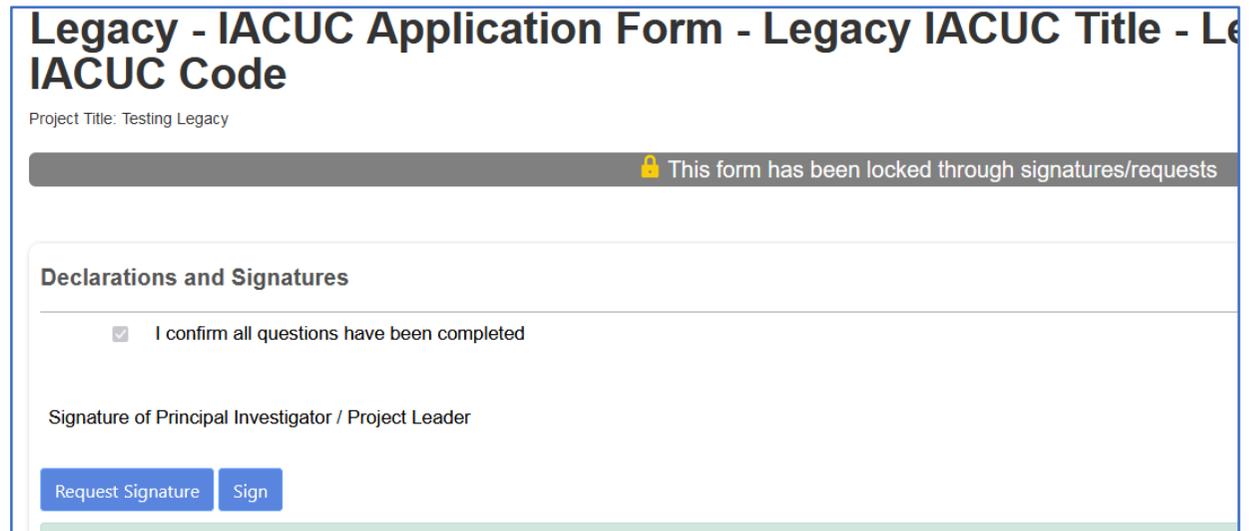


The screenshot shows a dialog box titled "Request a signature" with a close button (X) in the top right corner. Below the title, it says "Enter the email address of the person you want to sign this form". There are two input fields: "Email Address" and "Enter a message (Optional, max 800 characters)". At the bottom right, there are two buttons: "Request" (in blue) and "Close" (in grey).



The screenshot shows a dialog box titled "Sign Form" with a close button (X) in the top right corner. Below the title, it says "Are you sure you wish to sign this form?". There are two buttons: "Sign" (in green) and "Close" (in grey). A black callout bubble with white text points to the "Sign" button, containing the text "Click HERE to SIGN."

Once you sign or request the signature, the form will be locked, as shown.



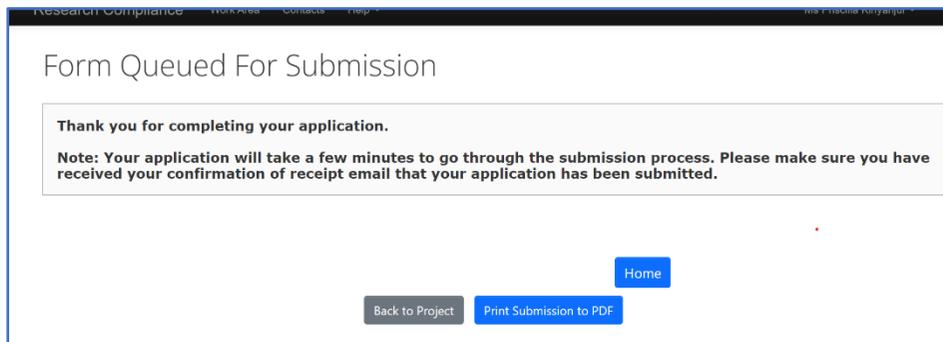
The screenshot shows a web form titled "Legacy - IACUC Application Form - Legacy IACUC Title - Legacy IACUC Code". Below the title, it says "Project Title: Testing Legacy". A grey banner with a lock icon and the text "This form has been locked through signatures/requests" is displayed. Below the banner, there is a section titled "Declarations and Signatures" with a checked checkbox and the text "I confirm all questions have been completed". Below this, it says "Signature of Principal Investigator / Project Leader". At the bottom, there are two buttons: "Request Signature" (in blue) and "Sign" (in blue).

## Submitting the Legacy IREC/IACUC/IBC Application

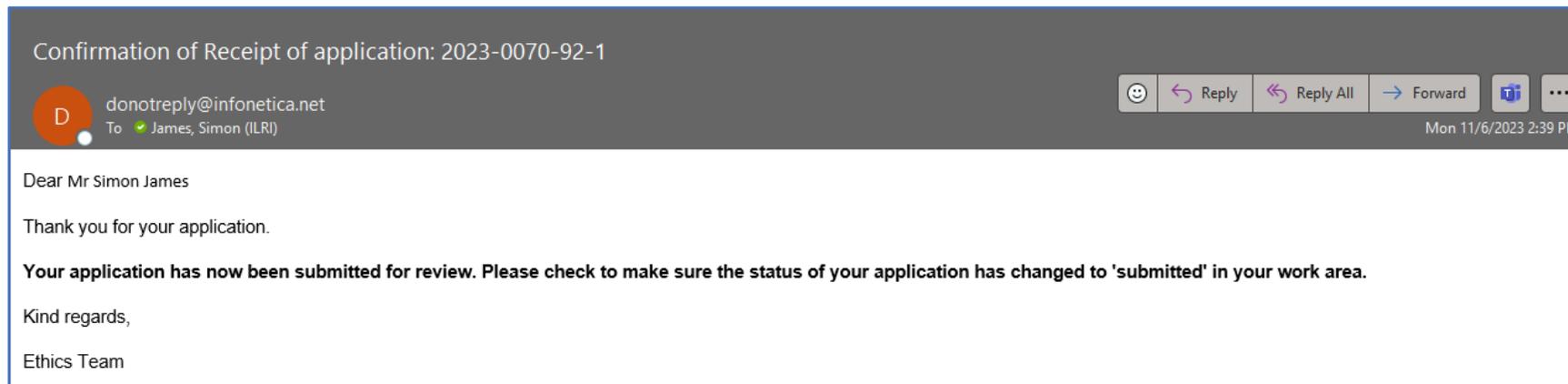
After the principal investigator has signed, the form must be submitted by clicking on the **Submit** button.



Once you submit your legacy application form the following text box will appear on your screen as shown below.



You will receive an e-mail notification that your legacy form has been submitted.



The Legacy Form has been submitted to the Research Compliance Secretariat who will review and approve the form if all information is complete.

If all information is complete you will receive an e-mail confirming **you may proceed to generate a new amendment or renewal, as required** (left-hand e-mail below). Otherwise you will be required to complete missing information and resubmit (right-hand e-mail below)

**0014 Application Acknowledged**

 donotreply@infonetica.net  
To  Poole, Jane (ILRI)  
Cc  Poole, Jane (ILRI)

15:52

Dear Jane

The Secretariat has reviewed and approved your legacy submission for completeness. You may now continue to create a new Amendment or Renewal for this IBC (Legacy) previously approved application".

<https://applicant.researchcompliance.ilri.org/Project/Index/65>

Contact [ilriresearchcompliance@cgiar.org](mailto:ilriresearchcompliance@cgiar.org) for any support that you may require.

Regards

ILRI Research compliance

**0014 - Revisions required**

 donotreply@infonetica.net  
To  Poole, Jane (ILRI)  
Cc  Poole, Jane (ILRI)

15:54

 Letter.pdf  
226 KB

Dear Jane

Changes have been requested to be made on your IACUC (Legacy) application. Additional information can be found in the attached document. Please click the following URL to login and take the necessary action:

<https://applicant.researchcompliance.ilri.org/Project/Index/46>

Contact [ilriresearchcompliance@cgiar.org](mailto:ilriresearchcompliance@cgiar.org) for any support that you may require.

Regards

ILRI Research compliance

You also can check for any notification in your Work Area:

**Work Area**

Notifications	Signatures	Transfers	Shared
6	0	0	0

## Corresponding with Research Compliance

If you have any questions about this process, please contact [ilriresearchcompliance@cgiar.org](mailto:ilriresearchcompliance@cgiar.org).

It is better to keep questions and comments relating to specific applications within the review system, through your responses to the Panel Comments described earlier. However, if you have a specific question related to an application and prefer to keep an audit trail of this you can go to the 'Correspondence' tab below the project tree and send a message to the Secretariat by clicking on 'New Correspondence'. Note that the appropriate application form should be highlighted in the tree before you send the correspondence. **The tab will only be available after the 1<sup>st</sup> submission has been made.**

The screenshot shows a web interface with a navigation bar at the top containing the following tabs: Navigation, Documents, Signatures, Collaborators, Submissions, Correspondence (which is the active tab), Centre, and History. Below the navigation bar, the main content area is titled 'Correspondence' and features a dark grey button labeled 'New Correspondence'. A light blue banner below the button contains the text 'Note: No correspondence found'.