# Introduction

This guide will show you how to access and use the new REB System as a researcher and REB applicant.

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1. Signing In

Visit: https://theroyal.forms.ethicalreviewmanager.com/

**Step 1: Enter your email and password**

- **If you do not have an account yet,** press **New User.** You will need to Register by completing the required blank fields (*) and agreeing to the Terms and Conditions. Once submitted, activate your account by pressing the link provided by the infonetica email.

- **If you forget your password or this is the first time you are signing in,** click **Forgotten Password** and enter your email. Once you receive this email, you will have 24-hours to create a new password by pressing the link provided by the infonetica email.

**Step 2: Welcome to your Work Area**

Now you’re ready to get started! Some important areas are highlighted for your future reference. Please note that Projects are your studies.

Click **Work Area** on the top bar to return to this page later.

If you press **Help**, you can access information about the REB as well as **Templates.** On the Templates page, you can download all current document templates provided by the REB, including Informed Consent Templates, Letters of Support Templates, and more.
2. Submitting a New Study

To begin, you will need to create your Initial REB Application. This process is for all new research studies.

**Step 1: Click Create Project**

![Create Project](image)

**Step 2: Select REB Initial Application Form**

When you press ‘Create Project’, a pop-up will appear. You will need to title your project (this should be the same study name on your protocol). You will select **REB Initial Application Form** and press **Create**.

![Select REB Initial Application Form](image)

**Step 3: Click on Click Here to Start**

Now that your project is created, your **REB number (Project ID)** is available. Open your REB Application Form by clicking **Click Here to Start**.

![Click Here to Start](image)
**Step 4: Complete Your Application Form**

Please enter information into the blank spaces provided. To move onto the next section, click **Next page** or **Next**. All information can be edited until the form is submitted for signature. A project can only be submitted once all required blanks are completed and signatures collected. Please **Save** often as you will time out after 30 minutes.

**How to Add Study Personnel**

While you can manually complete information about Study Personnel, you can also complete their information by typing their name into the **Search User** field. If the person is Registered, you can click their name and their information will be auto-completed. Once added as Study Personnel, they will receive emails about the status of the Project once the project is submitted, but this will not grant editing or submitting permissions on the form.

**How to Upload Documents**

Click **Upload Document**. Click **Browse** in the pop-up to find your document on your computer. The date and version should match the information in the footer of the document. **All items are Version 1 until REB approval is granted.** Add the REB number in the footer of all documents.

Click **Upload** and the section will be replaced with the uploaded item.

For sections that allow multiple uploads, you will have the option to upload more than one document. Click **Documents** to view all documents uploaded for this application, including the PDF version of the REB Application, which is called ‘Form’.
Adding Team Members

Study Personnel are separate from Collaborators. If you want your Study Personnel to have access to the project application, you will have to share your project with them in addition to adding them as Study Personnel.

To view current collaborators, click Collaborators. All projects begin with no collaborators.

You can share your project with other researchers by clicking the Roles button.

Next, enter your Collaborator’s email and the role they will have:

- Additional Study Team Member (can read and edit)
- Co-Investigator (can read, edit, and create sub forms)
- Main Contact (can read, edit, and create sub forms)
- Principal Investigator (can read, edit, create sub forms, share and submit)
- Research Assistant (can read, edit, and create sub forms)
- Supervisor (can read, edit, and create sub forms)

Click Share Role at the bottom of the pop-up to add the new collaborator(s). Your collaborators will now have access to the project and it will appear on their Work Area.

Collaborators can make comments on the form by clicking on the form page they wish to address. These comments are only visible to collaborators.

Once a comment is made, a new box will appear called ‘Comments’. By clicking this new box, you can see all the current comments.

Clicking a specific comment will direct you to the applicable form page where the comment can be viewed by clicking . Only the owner of the form can edit or delete collaborator comments.
Tips for Moving Through Sections

If you want to return to another page, you can click **Navigate**. This button will return you to your project view. If you scroll down, you’ll see all the sections of the Initial Application Form listed.

Click on the **blue** section you wish to visit. Boxes with **black** text are sections that are not applicable to your current application and cannot be visited. Box colour will change based upon options selected in the form.
Step 5: Collect Signatures

Once the form is complete, you will need to collect the signature of the Principal Investigator. Once a request or signature is submitted, the application can no longer be edited. You can unlock the submission to edit, but the signature request will be cancelled.

- If you are not the Principal Investigator, you can request their signature by pressing Request Signature. Input the Principal Investigator’s email and an optional message. They will receive an email notifying them of the request.

- If you are the Principal Investigator, you can sign the form by pressing Sign. To sign a form, enter your email and password.

Once signed, the application will automatically be sent for review. You, study personnel, and collaborators with notification permissions will receive an email once your Initial Application Form has been submitted.

Signature Request

If you have been requested to sign an application form, you will be notified via email. If you open the link, you’ll see the applications that have requested your signature. Click View Form to see the application.

You can read the entire application and make comments on specific sections by clicking .

- If you are happy with the application, click Sign and complete the signature by entering your email and password.

- If you require changes, you can Reject the application. A pop-up will request your email and password as well as a reason for the rejection. The applicant can then change the form and make another request later.

Step 6: Celebrate!

With your application signed and submitted, you’ll need to wait for your application to undergo a preliminary review.
3. Review Process

All new studies first undergo a **Preliminary Review** by a REB Facilitator to confirm the application form is completed properly. If no changes are required, the application will be sent for review. There are three types of REB Review:

1. **Administrative Review:** REB Facilitator reviews the submission as soon as possible
2. **Delegated Review:** One or more REB members review the submission as soon as possible
3. **Full Board Review:** All REB members review the submission at the meeting once a month

Once your Initial Application Form has been sent for review, you, the study personnel, and collaborators with notification permissions will receive an email stating the type of review being conducted. Another email will be sent once the review has been completed along with the findings of the review.

- If your application is **approved**, you will receive an email with the REB approval letter attached and you may begin your research.
- If your application is **rejected**, you will receive an email with the REB rejection letter attached. You will need to make a new application form to reapply for REB approval.
- If changes are required, you’ll need to update your form and resubmit the application. See Chapter 4.

**Checking the Status of Applications**

To check the status of your applications, go to your **Work Area**. Click on the **Project Title** to go to the project page.

![Work Area screenshot](image_url)

The **Status** of the **REB Initial Application Form** can be found on the project page. **Action Required on Form** lets you know if your attention is needed to move the application forward. **Yes** means you need to complete or edit the form.
4. Responding to Change Requests and Letter of Concerns

If changes are required from the Preliminary Review or REB Review, you will need to change your form.

First, you will receive an e-mail with the Change Letter or Letter of Concerns attached. Click the link in the email to arrive on the Project Page. You can also access this page by your Work Area and selecting the project, or by looking at your Notifications.

**Step 1: Review the Concerns**

The review comments made on the Change Letter or Letter of Concerns can be found on the form by clicking Reviewer Comments.

The pop-up will list all reviewer comments. Click on the specific comment you wish to read.

You will be redirected to the question the comment was made on, automatically outlined in red. You can then edit the question by typing in the blank or selecting a different option, depending on the question.
To see the reviewer comment on a page, you can click . The other is for Collaborator comments. If there are no reviewer comments on a section, only the Collaborator comment bubble will be visible.

**Step 2: Make Changes**

You will be able to edit any question by typing in the blank or selecting a different option, depending on the question.

If there are comments on questions for uploaded documents, you will have to Delete the old document and Upload the updated document. **All items are Version 1 until REB approval is granted.**

- **NOTE:** All uploaded documents require REB number (Project ID), version number, and version date in the footer.

4.4 Upload the current protocol.

<table>
<thead>
<tr>
<th>Type</th>
<th>Document Name</th>
<th>File Name</th>
<th>Version Date</th>
<th>Version</th>
<th>Size</th>
<th>View</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Study Protocol</td>
<td>Protocol Test</td>
<td>Protocol Test.docx</td>
<td>13/03/2024</td>
<td>1</td>
<td>11.2 KB</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In **Section 13: Additional Documents**, you will also need to upload your **Response to Letter of Concerns**, which is a word document that describes how each concern in the Letter of Concerns was addressed. Click **Upload Document** to upload your Response.

- **NOTE:** Preliminary Reviews Change Requests do not require a Response to Letter of Concerns.
Once changes are made, you can see the changes throughout the form by clicking **Compare with Previous Submission**.

In this view of the application, all changes made will be highlighted in green. To further edit or submit your application, you will need to return to the edit mode by pressing **Return to Edit Mode**.

Once you are done with your edits and ready to submit, you will need to collect Signatures again. Click **Signatures** and complete the pop-up information.

**Step 6: Celebrate again!**

With your updated application signed and submitted, you’ll need to wait for your changes to be reviewed.
5. Submitting Sub Forms

Once a project has REB Approval, you can submit sub forms. Sub forms are additional forms for your study, like Amendment Forms and Annual Renewal Forms. Only one sub form can be submitted for review a time; therefore, if you need to submit a renewal and amendment, you will need to prioritize which form should be submitted for review first.

**Step 1: Create a Sub Form**

On your Project View, make sure the REB Initial Application Form is highlighted in Project Tree. Click Create Sub Form.

Select the sub form you wish to create in the pop-up.

In this example, we’ll be creating an Amendment Form. Click Create.

The Amendment Form is now created in the Project Tree. Each form in the Project Tree is saved separately. Therefore, the Documents tab will only include the documents uploaded for this Amendment Form. Any sub form can be deleted before it is submitted.

If you want to return to the Initial Application, click on the previous application in the Project Tree. To see all forms and documents uploaded for this project, click the Project Name in the Project Tree.
**Step 2: Complete the Sub Form**

To begin your form, click on Click Here to Start from your Project View of the Amendment Form.

**REB Amendment Application Form**

Complete the Form. Some information will be populated from your answers on the Initial Application Form, like Project Full Title. To move onto the next section, click Next page or Next. All information can be edited until the form is submitted for signature. Please Save often as you will time out after 30 minutes.

**Step 3: Upload updated documents**

To submit updated or new documents, select the document type you are uploading.

**Documents Submitted for Review**

2.0 Documents included in this submission for review

- Please check all that apply. Include the version dates and numbers of the updated documents. The REB requires both a tracked changes copy and a final clean copy.

2.1 Study Protocol

Upload the clean version and the tracked version (using Tracked Changes in Word) of the document you wish to amend.

If this were your first amendment of the document, it would be version 2.

Ensure the version, date, and REB number are in the footer of the documents.
**Step 4: Collect Signatures**

Once you are ready to submit, you will need to collect Signatures. Click **Signatures** and complete the pop-up information.

**Step 5: Celebrate!**

With your sub form signed and submitted, you’ll need to wait for your form to be reviewed. If changes are required, follow the steps outlined in section 4.
6. Common Questions

**How can I add a new Collaborator to a Project with REB Approval?**

Collaborators can be added at any time by opening the REB Initial Application Form in the Project View and clicking Roles. Once added, the Collaborator will have access to the entire project. If you want to add their name to any of the project materials, please submit an amendment.