

# REB Applicant System Guide

## 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.

## Research Ethics Application

## 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**

Research Ethics Applications Work Area Contacts Help Ms Alexis Dorland

Create Folder Delete Folder **Create Project**

Delete Project Duplicate Project Move Project

Transfer

Notifications 0 Signatures 0 Transfers 0 Shared 0

Projects

Search Projects

Project Title Project ID Owner Date Created Date Modified Transfer Status

### 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**.

Create Project

Project Title\* (Max 200 characters)  
Please enter a title

Form\*  
Please select...  
Please select...  
**REB Initial Application Form**  
REB Legacy Approved Study  
Please select...

Create Close

### 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**

Research Ethics Applications Work Area Contacts Help Ms Alexis Dorland

Project Create Sub Form Share

Completeness Check Submit Refresh

View as PDF

**Test 92 - Interventional Study** **0053**

Project Tree

- Test 92 - Interventional Study
  - REB Initial Application Form

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	11/03/2024 10:56

Navigation Documents Signatures Collaborators Submissions Centre History

**REB Initial Application Form**  Show Inactive Sections

Section

Section 1 - Project Information **Click Here to Start**

Section 2 - Filter Questions [Board of Record](#)

Questions

## 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.

Research Ethics Applications Work Area Contacts Help Ms Alexis Dorland

# REB Initial Application Form

Project Title: Test 92 - Interventional Study

53  
Version: Beta

Previous Next Navigate

View as PDF Documents Signatures

Save Share Collaborators

Completeness Check Submit

Submit Project Title

1.0 Project Full Title Test 92 - Interventional Study

Previous page Next page

## 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.

Search User

Title

First Name

Surname

Designation Please Select...

Program Please Select...

Address Please Select...

Telephone

Email

## 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'.

### 4.4 Upload the current protocol.

Upload Document

Documents - Study Protocol

Please attach your Study Protocol here:

Document Name	Version Date	Version	
<a href="#">Browse</a>	<input type="text"/>	<input type="text"/>	<a href="#">Upload</a>

4.4 Upload the current protocol.

Type	Document Name	File Name	Version Date	Version	Size	View	Delete
Study Protocol	Protocol Test	Protocol Test.docx	11/03/2024	1	11.2 KB	<a href="#">Download</a>	<a href="#">Delete</a>

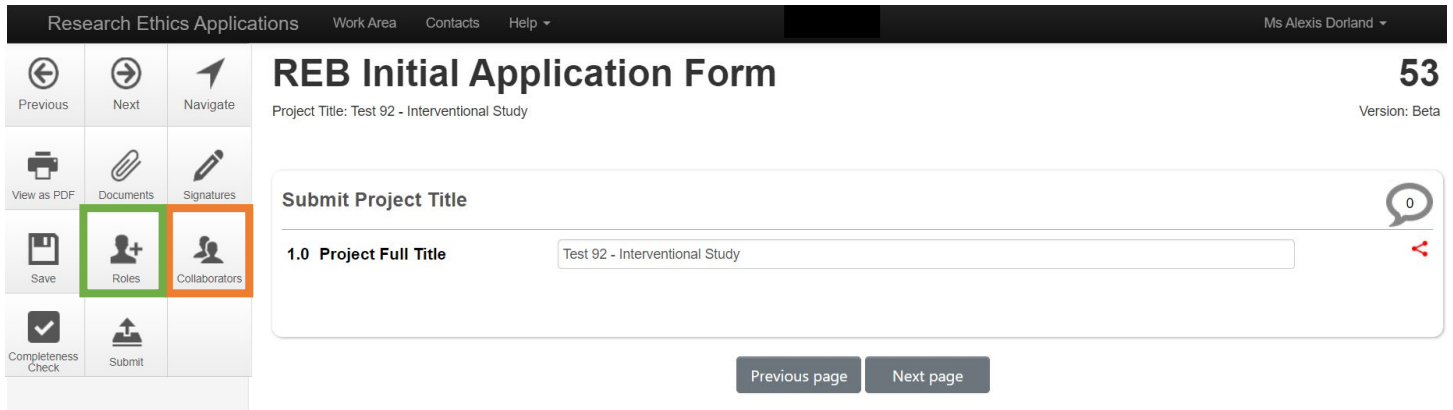
View as PDF Documents Signatures

## 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.

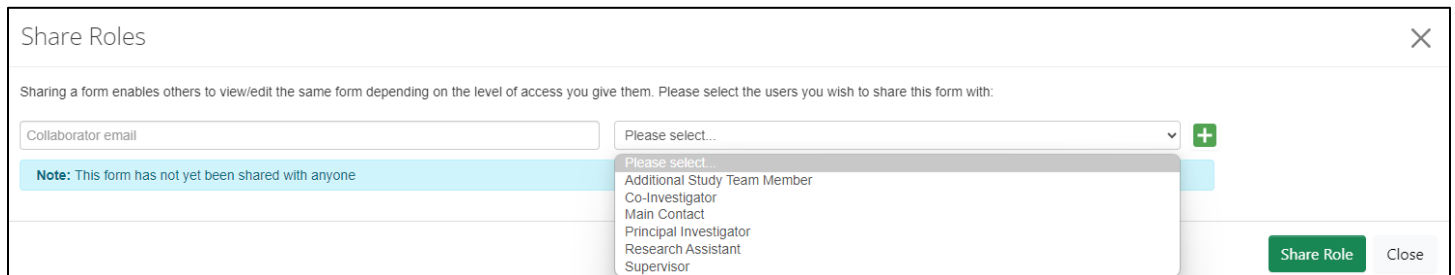
To view current collaborators, click **Collaborators**. All projects begin with no collaborators.

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

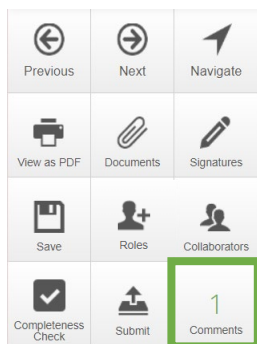



Next, enter your Collaborator's email and the role they will have:

- ✓ **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.

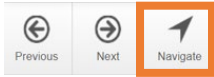


Collaborators can **make comments** on the form by clicking  on the form page they wish to address. These comments are only visible to collaborators.

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.

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	11/03/2024 10:56

### REB Initial Application Form

#### Section

- Section 1 - Project Information
- Section 2 - Filter Questions
- Section 3 - Study Personnel
- Section 4 - Study Information
- Section 5 - Chart Review & Secondary Use of Information Studies
- Section 6 - Observational and Interventional/Clinical Trials
- Section 7 - Participant Information
- Section 8 - Observational & Interventional Research
- Section 9 - Informed Consent
- Section 10 - Compensation and Reimbursement
- Section 11 - Safety
- Section 12 - Privacy and Confidentiality
- Section 13 - Additional Documents
- Section 14 - Conflict of Interest
- Section 15 - Contingency Planning
- Section 16 - Checklist of Resources
- Section 17 - Attestation & Signatures

#### Questions

- Click Here to Start
- Board of Record
- Study Personnel | Training Program Information
- Study Information
- Chart Review Application Specific Questions
- Study Design | Clinical Trial Information | Site Information
- Recruitment Details | Sample Size | Target Population | Study Procedures and Interventions
- Participant Recruitment
- Informed Consent
- Compensation and Reimbursement
- Safety
- Privacy and Confidentiality
- Additional Documents
- Conflict of Interest
- Contingency Planning
- Checklist of Resources
- Attestation & Signatures

Show Inactive Sections

De-select to hide  
black sections

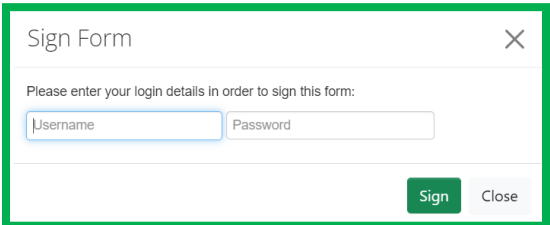
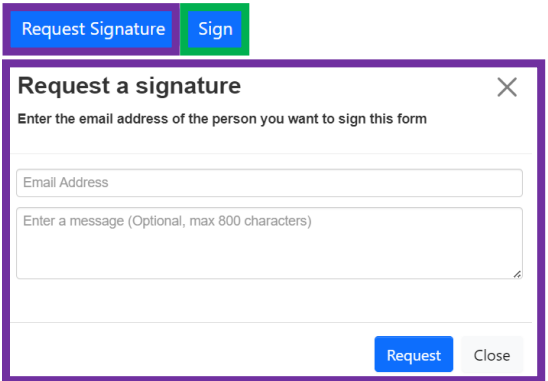
## Step 5: Collect Signatures

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 of Principal Investigator

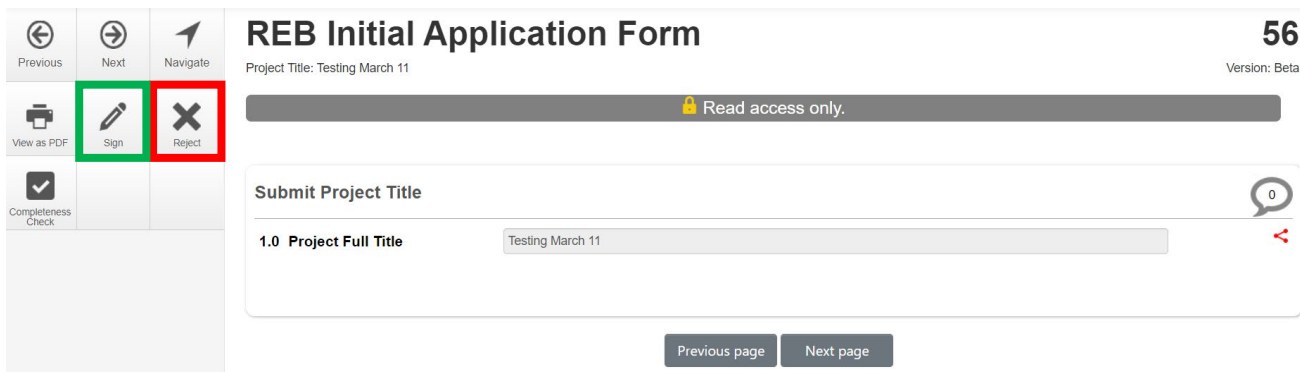


## Signature Request

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.

Type	Project Title	Project ID	Requesting User	Message	Requested Date	Response Date	Status	Action
Principal Investigator	Testing March 11	56	Ms Amanda Pallotti	PI signature required please.	11/03/2024 14:09		Requested	<a href="#">View Form</a>

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.

Project Title	Project ID	Owner	Date Created	Date Modified	Transfer Status
March 11, 2024 New Project #2	57	Ms Amanda Paliotti	11/03/2024 14:24	11/03/2024 14:30	

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.

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	11/03/2024 14:30



## 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.

**Test 96 - Interventional** 0058

Project Tree

- Test 96 - Interventional
  - REB Initial Application Form

Action Required on Form	Status	Review Reference	Date Modified
Yes	Changes Requested	2024-0058-v1	12/03/2024 10:46

Navigation: Documents Signatures Collaborators Submissions Centre History

REB Initial Application Form  Show Inactive Sections

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

Overall Reviewer Panel Comments

Show Previous Comments

Title	Comment	Date Added	Submission
1.0 Project Full Title	Concern Example	12/03/2024 at 10:59 AM	Latest Submission

Close

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.

REB Initial Application Form

Project Title: Test 96 - Interventional

58 Version: Beta

Compare with Previous Submission

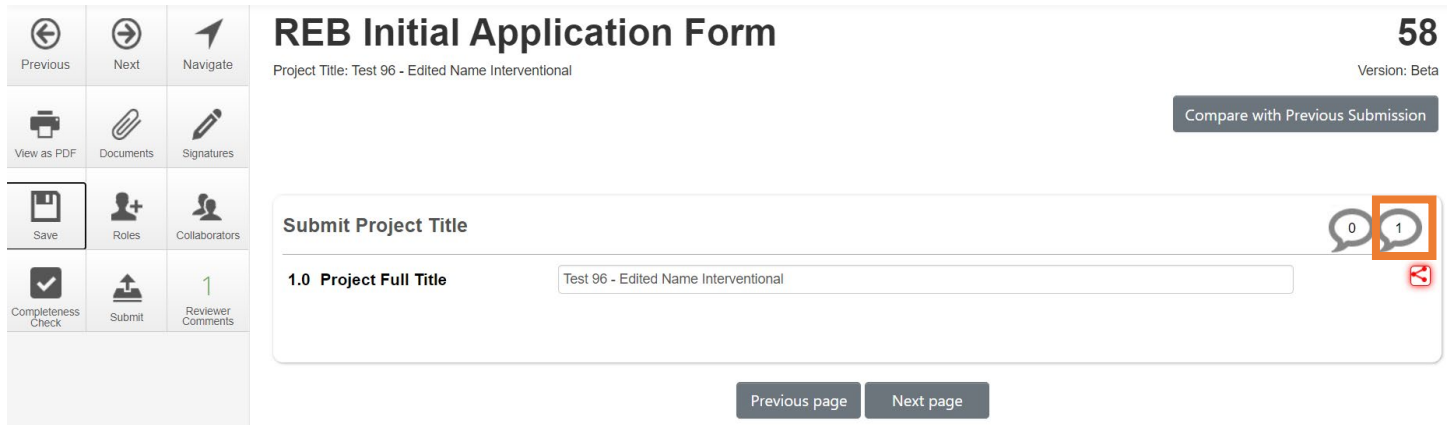
Submit Project Title

1.0 Project Full Title Test 96 - Interventional

Previous page Next page



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.

sub



**REB Initial Application Form** 58  
 Project Title: Test 96 - Edited Name Interventional Version: Beta

Compare with Previous Submission

Submit Project Title  

1.0 Project Full Title

Previous page Next page

## 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.**

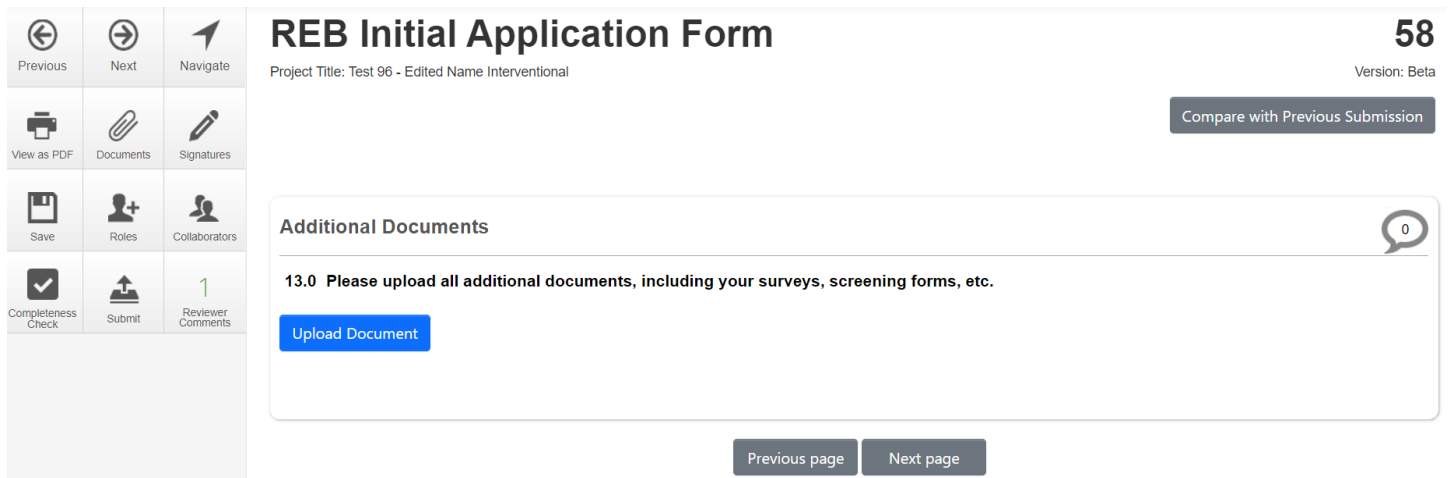
➤ **NOTE:** All uploaded documents require REB number (Project ID), **version number**, and **version date** in the footer

### 4.4 Upload the current protocol.

Type	Document Name	File Name	Version Date	Version	Size	View	Delete
Study Protocol	Protocol Test	Protocol Test.docx	13/03/2024	1	11.2 KB	Download	Delete


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.



**REB Initial Application Form** 58  
 Project Title: Test 96 - Edited Name Interventional Version: Beta

Compare with Previous Submission

Additional Documents 

13.0 Please upload all additional documents, including your surveys, screening forms, etc.

Upload Document

Previous page Next page

Once changes are made, you can see the changes throughout the form by clicking **Compare with Previous Submission**.

The screenshot shows the 'REB Initial Application Form' interface. On the left is a navigation sidebar with icons for Previous, Next, and Navigate. Below these are icons for View as PDF, Documents, Signatures, Save, Roles, Collaborators, Completeness Check, Submit, and Reviewer Comments. The main content area has a title 'REB Initial Application Form' and a subtitle 'Project Title: Test 96 - Edited Name Interventional'. In the top right corner, the number '58' and 'Version: Beta' are displayed. A button labeled 'Compare with Previous Submission' is highlighted with an orange border. The form contains a section titled 'Submit Project Title' with a text input field containing 'Test 96 - Edited Name Interventional'. There are two speech bubble icons with '0' and '1' next to the input field. At the bottom, there are 'Previous page' and 'Next page' buttons.

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**.

This screenshot shows the 'REB Initial Application Form' in 'Track Changes' mode. The left sidebar is identical to the previous screenshot. The main content area shows the title 'REB Initial Application Form' and subtitle 'Project Title: Test 96 - Edited Name Interventional'. The number '58' and 'Version: Beta' are in the top right. A red note reads: 'Note: The form is not editable when viewing changes compared to the previous submission. If you wish to make edits, click 'Return to Edit Mode'.' A button labeled 'Return to Edit Mode' is highlighted with an orange border. The form section 'Submit Project Title' has a text input field with 'Test 96 - Edited Name Interventional', where 'Edited Name' is highlighted in green. A 'Track Changes' sidebar on the right shows 'Submitted on: 2024-03-12', 'Submitted by: Alexis Dorland', and 'Review reference: 2024-0058-v1'. At the bottom, there are 'Previous page' and 'Next page' buttons, and a 'This Page' button.

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.

This screenshot shows the 'REB Initial Application Form' interface with the 'Signatures' button in the left sidebar highlighted with an orange border. The rest of the interface, including the title, subtitle, version information, and the 'Submit Project Title' form section, is identical to the previous screenshots.

### 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**.

Action Required on Form	Status	Review Reference	Date Modified
No	Delegated Approved	2024-0058-v3	13/03/2024 12:44

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.

Review Reference

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.

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	13/03/2024 12:50

Navigation: **Documents** | Signatures | Collaborators | Submissions | Centre | History

### REB Amendment Application Form

Section 1: [Click Here to Start](#)

Section 2: [Documents Submitted for Review](#)

Section 3: [Rationale for Amendment](#) | [Attestation & Signatures](#)

## 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

Show Inactive Sections

Section	Questions
Section 1	<a href="#">Click Here to Start</a>
Section 2	<a href="#">Documents Submitted for Review</a>
Section 3	<a href="#">Rationale for Amendment</a> <a href="#">Attestation &amp; Signatures</a>

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.

REB Amendment Application Form

Project Title: Test 97 - Multi-Doc Test

60

Version: Beta

Previous Next Navigate

View as PDF Documents Signatures

Save Collaborators Completeness Check

Submit

Project Information

Please complete all of the following sections. Amendments must be submitted to the REB for review and approval prior to implementing the changes in the study

Add to contacts

1.0 Applicant

Title Ms

## 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.

- Study Protocol
  - Main Informed Consent/Information Form (ICF)
  - Optional Consent Form(s)
  - Recruitment Tools/Posters Etc
  - Other

#### 2.1 Study Protocol

[Upload Document](#)

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.

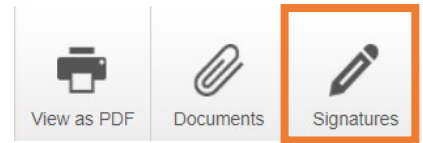
Ensure the version, date, and REB number are in the footer of the documents.

#### 2.2 Study Protocol - Tracked Copy

[Upload Document](#)

#### Step 4: Collect Signatures

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



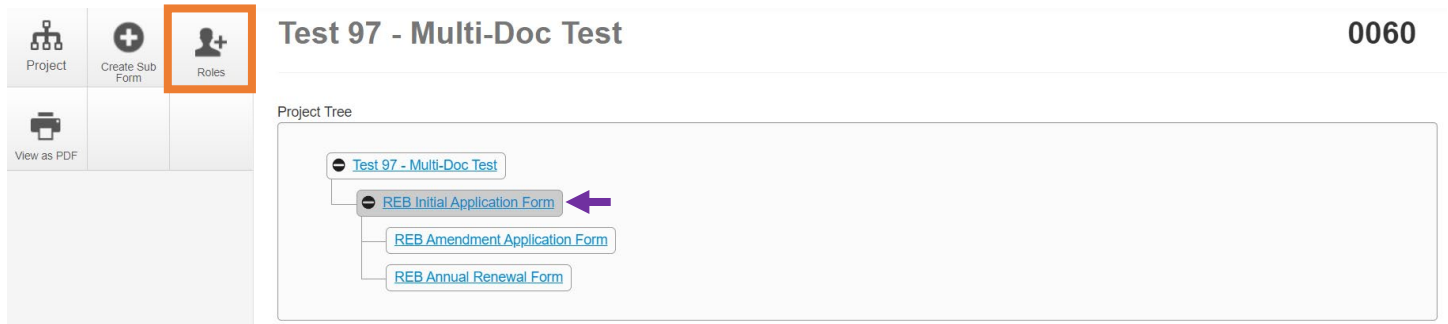
#### Step 5: Celebrate!

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.



The screenshot displays a project management interface. On the left, a sidebar contains four buttons: 'Project', 'Create Sub Form', 'Roles', and 'View as PDF'. The 'Roles' button is highlighted with a red rectangular box. The main area shows the project title 'Test 97 - Multi-Doc Test' and the ID '0060'. Below this is a 'Project Tree' section containing a hierarchical list of items: 'Test 97 - Multi-Doc Test', 'REB Initial Application Form', 'REB Amendment Application Form', and 'REB Annual Renewal Form'. A purple arrow points to the 'REB Initial Application Form' item.