For Conditional Offices: How to Review a Submission

These instructions are for a reviewer in a conditional office, who has been assigned a protocol to review. This process begins after the Intake user for the conditional office has assigned the micro task to a reviewer.

1. On your To Do List, you see a task like this:

![To Do List](image)

2. Click into the task.

3. After clicking into the task, you see the subtitle Analyst Review and the submission is displayed:

![Analyst Review](image)
4. If the Analyst who sent this left any comments for you, they will be shown in the **Comments from...** field.

5. **From the Action drop-down menu, select Setup Review.**

6. The **Review Dashboard** tab comes to the forefront. Click the **Add Review** button.

7. A row for the review is added.
8. For **Review Type**, select **Administrative Review**. The **Review Process** will automatically set to **Administrative**.

9. Navigate from tab to tab, and leave field-level comments as needed:

   - **Clinical Research Study Category**
     - Industry
     - Sponsor
     - Initiated

   - **Payment Options**:
     - Option 1: No protocol-required services will be billed to patients or third-party payers. **Does Not Need MCA**
     - Option 2: Protocol-required services (e.g., routine care services) will be billed to patients or third-party payers. **Must Have MCA**
     - Option 3: Study is initiated and federally funded by a Government Sponsored Cooperative Group who will only pay for services that are solely conducted for research purposes and other protocol-required services (e.g., routine care services) will be billed to patients or third-party payers. **Billing Grid Only Required, NO MCA**
     - Option 4: Study involves only data collection and has no protocol-required clinical services. **Does Not Need MCA**
     - Option 5: Study is not described in any of the above options. Please describe the study and specify whether External Sponsor (e.g., industry, government, or philanthropic source) and/or patient/third party payer will pay for protocol-required services. **MCA MAY Be Required**
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10. You can examine attachments by downloading and opening them.

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Attachment</th>
<th>Uploaded Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent Documents</td>
<td>Consent Form.docx</td>
<td>Consent Form.docx</td>
<td>02/24/2016</td>
<td>View</td>
</tr>
<tr>
<td>Data Collection Sheet</td>
<td>Data Collection Sheet</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Sponsor Protocol Imputed</td>
<td>Protocol</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Written Communication from</td>
<td>Letter.pdf</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>the Sponsor Documenting the</td>
<td>New Doc Application (NDA)</td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>IND Number</td>
<td>Approval Letter.pdf</td>
<td>02/24/2016</td>
<td>View</td>
<td></td>
</tr>
</tbody>
</table>

11. You can leave comments for an attachment. You can also upload a suggested document, for example, a marked-up version of the document that the researcher submitted.

<table>
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Consent form needs to state specific amount of compensation that participants will be given. Please upload a revised version, and also a version with track changes turned on so we can see this change.

12. When you finish leaving comments, check the Comments tab to ensure that it contains all of the comments that you intended:
13. In the **Review Comments** field in the left margin, enter generalized comments for the investigator.

**Analyst Review**

**Comments from Kelly Ware**

This was previously reviewed via email. They are now submitting in the system.

**General Comments**

Contact the Office of Research Services if you need assistance with the OHR.

14. Return to the **Review Dashboard** tab. You might need to re-open the row containing your review:
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15. **Select a Motion:**

16. The **Set Result** button appears. Click to set the result.

17. Click the **Submit** button. The review is completed and the task is removed from your To Do List.