- Attachments may be added at any time, even after Closure (via a study Modification).
- Attachments may be required, but <u>templates</u> are not provided.

Document Management: Attachments Overview

At Step 1:

- Required attachments are listed, but templates are not provided.
- You may alternatively satisfy a requirement by indicating that the document is not yet ready.

Scroll to slide #2 for Step 1 details

At Step 2:

- Assign Document Type;
- *Browse* computer for attachment, and
- Upload Attachment.

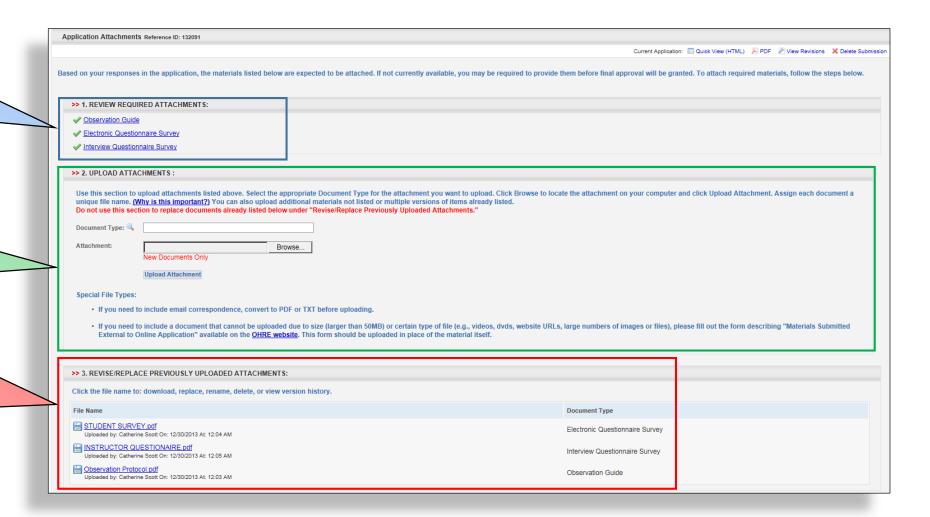
Scroll to slide #3 for Step 2 details

At Step 3:

Manage documents uploaded at Step 2 (now listed at Step 3):

- Download to edit
- Replace with a revised version
- Rename your file
- View Version History
- Delete document

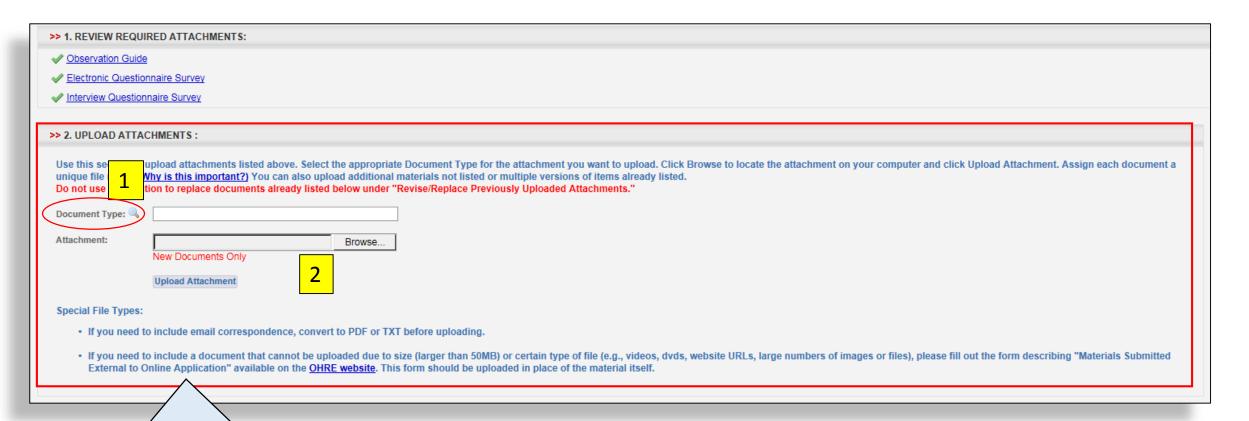
Scroll to slide #4 for Step 3 details



Document Management: Attachments Step 1 (Requirements)

Consent requirements are listed at the top of Step 1 (templates are not provided). >> 1. REVIEW REQUIRED ATTACHMENTS: Observation Guide Electronic Questionnaire Survey • Click the blue linked requirement to open a pop up. • Check the "Not Yet Available / Not Applicable" box to Attachment not provided because: alternatively satisfy a consent ☐ Not Yet Available / Not Applicable requirement (as appropriate). More Information: Why is this form required? Your response to the following question triggered this requirement • Click Why is this form A.4. Study design, methods and procedures required? to display the ⇒ Questionnaire, surveys: electronic application question triggering the requirement; Click the trigger-question <u>link</u> to jump to the application where you may review/revise your response and remove the IRBIS indicates whether a requirement has been satisfied: requirement, if appropriate • Green checkmark = requirement satisfied • Red X = requirement not satisfied

Document Management: Attachments Step 2 (Upload new document)



Save your attachment to your computer, using a unique file name (for instructions, click Why is this important?).

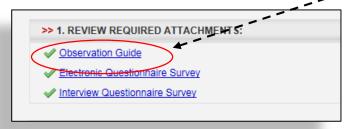
- 1. From the drop-down list, select the **Document Type** corresponding to the requirement listed in **Step 1**.
- 2. Browse for and Upload your attachment.

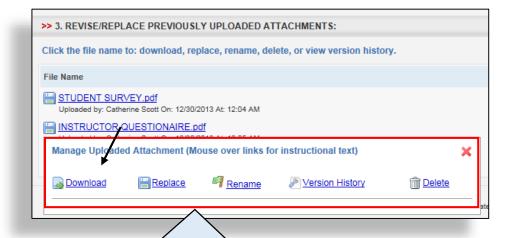
Important: Upload only New documents at **Step 2**. <u>Do not use this step to upload revised (replacement) attachments</u>.

- Attachments uploaded at **Step 2**, will be listed at **Step 3**.
- If the Step 2 Document Type matches the corresponding Step 1 requirement, that requirement will be "satisfied" (Red X will be converted to a Green check, Step 1).

Document Management: Attachments Step 3 (Revise/replace existing document)







At **Step 3**, you may manage existing attachments, as follows:

- Download a document for editing
- •Replace an a document
- Rename your file (without otherwise revising)
- Delete a document no longer in use
- View <u>Version History</u>

To access the actions pop-up, click the <u>blue linked file name</u>, then select desired action.