

Document Management: Attachments Overview

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

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

Application Attachments Reference ID: 132091

Current Application: [Quick View \(HTML\)](#) [PDF](#) [View Revisions](#) [Delete Submission](#)

Based on your responses in the application, the materials listed below are expected to be attached. If not currently available, you may be required to provide them before final approval will be granted. To attach required materials, follow the steps below.

>> 1. REVIEW REQUIRED ATTACHMENTS:

- ✓ [Observation Guide](#)
- ✓ [Electronic Questionnaire Survey](#)
- ✓ [Interview Questionnaire Survey](#)

>> 2. UPLOAD ATTACHMENTS :

Use this section to upload attachments listed above. Select the appropriate Document Type for the attachment you want to upload. Click Browse to locate the attachment on your computer and click Upload Attachment. Assign each document a unique file name. **(Why is this important?)** You can also upload additional materials not listed or multiple versions of items already listed.
Do not use this section to replace documents already listed below under "Revise/Replace Previously Uploaded Attachments."

Document Type:

Attachment:

New Documents Only

Special File Types:

- If you need to include email correspondence, convert to PDF or TXT before uploading.
- If you need to include a document that cannot be uploaded due to size (larger than 50MB) or certain type of file (e.g., videos, dvds, website URLs, large numbers of images or files), please fill out the form describing "Materials Submitted External to Online Application" available on the [OHRE website](#). This form should be uploaded in place of the material itself.

>> 3. REVISE/REPLACE PREVIOUSLY UPLOADED ATTACHMENTS:

Click the file name to: download, replace, rename, delete, or view version history.

File Name	Document Type
STUDENT SURVEY.pdf <small>Uploaded by: Catherine Scott On: 12/30/2013 At: 12:04 AM</small>	Electronic Questionnaire Survey
INSTRUCTOR QUESTIONNAIRE.pdf <small>Uploaded by: Catherine Scott On: 12/30/2013 At: 12:05 AM</small>	Interview Questionnaire Survey
Observation Protocol.pdf <small>Uploaded by: Catherine Scott On: 12/30/2013 At: 12:03 AM</small>	Observation Guide

Document Management: Attachments

Step 1 (Requirements)

Consent requirements are listed at the top of **Step 1** (templates are not provided).

- Click the [blue linked requirement](#) to open a pop up.
- Check the “Not Yet Available / Not Applicable” box to alternatively satisfy a consent requirement (as appropriate).

- Click [Why is this form required?](#) to display the application question triggering the requirement;
- Click the [trigger-question link](#) to jump to the application where you may review/revise your response and remove the requirement, if appropriate

The screenshot displays the IRBIS interface for reviewing attachments. At the top, it says '>> 1. REVIEW REQUIRED ATTACHMENTS:'. Below this, there are two items in a list: 'Observation Guide' and 'Electronic Questionnaire Survey', both with green checkmarks. A red box highlights a pop-up window for the 'Electronic Questionnaire Survey' requirement. This window has a red 'X' in the top right corner. Inside the pop-up, it says 'Attachment not provided because:' followed by a checkbox labeled 'Not Yet Available / Not Applicable'. Below this, it says 'More Information:' and 'Why is this form required?'. Underneath, it explains that the requirement was triggered by a response to a question, and lists two trigger questions: 'A.4. Study design, methods and procedures' and 'Questionnaire, surveys: electronic'. Arrows from the callout boxes point to these elements in the screenshot.

IRBIS indicates whether a requirement has been satisfied:

- **Green checkmark** = requirement satisfied
- **Red X** = requirement not satisfied

Document Management: Attachments

Step 2 (Upload new document)

>> 1. REVIEW REQUIRED ATTACHMENTS:

- ✓ [Observation Guide](#)
- ✓ [Electronic Questionnaire Survey](#)
- ✓ [Interview Questionnaire Survey](#)

>> 2. UPLOAD ATTACHMENTS :

Use this section to upload attachments listed above. Select the appropriate Document Type for the attachment you want to upload. Click Browse to locate the attachment on your computer and click Upload Attachment. Assign each document a unique file name **1** [Why is this important?](#) You can also upload additional materials not listed or multiple versions of items already listed. Do not use **1** [this option to replace documents already listed below under "Revise/Replace Previously Uploaded Attachments."](#)

Document Type:

Attachment: Browse...

New Documents Only

2

Special File Types:

- If you need to include email correspondence, convert to PDF or TXT before uploading.
- If you need to include a document that cannot be uploaded due to size (larger than 50MB) or certain type of file (e.g., videos, dvds, website URLs, large numbers of images or files), please fill out the form describing "Materials Submitted External to Online Application" available on the [OHRE website](#). This form should be uploaded in place of the material itself.

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**. Do not use this step to upload revised (replacement) attachments.

Document Management: Attachments

Step 3 (Revise/replace existing document)

- 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**).

>> 2. UPLOAD ATTACHMENTS

Use this section to upload attachments listed above. Select the appropriate Document Type for the attachment you want to upload. Click Browse to locate the attachment on your computer and give it a unique file name. (Why is this important?) You can also upload additional materials not listed or multiple versions of items already listed. Do not use this section to replace attachments already listed below under "Revise/Replace Previously Uploaded Attachments."

Document Type:

Attachment: Browse...
New Documents Only

Upload Attachment

Special File Types:

- If you need to include email correspondence, convert to PDF or TXT before uploading.
- If you need to include a document that cannot be uploaded due to size (larger than 50MB) or certain type of file (e.g., videos, DVDs, website URLs, large numbers of images or files), please use the "External to Online Application" available on the [OHRE website](#). This form should be uploaded in place of the material itself.

>> 3. REVISE/REPLACE PREVIOUSLY UPLOADED ATTACHMENTS:

Click the file name to: download, replace, rename, delete, or view version history.

File Name	Document Type
STUDENT SURVEY.pdf Uploaded by: Catherine Scott On: 12/30/2013 At: 12:04 AM	Electronic Questionnaire Survey
INSTRUCTOR QUESTIONNAIRE.pdf Uploaded by: Catherine Scott On: 12/30/2013 At: 12:05 AM	Interview Questionnaire Survey
Observation Protocol.pdf Uploaded by: Catherine Scott On: 12/30/2013 At: 12:03 AM	Observation Guide

>> 1. REVIEW REQUIRED ATTACHMENTS:

- ✓ [Observation Guide](#)
- ✓ [Electronic Questionnaire Survey](#)
- ✓ [Interview Questionnaire Survey](#)

>> 3. REVISE/REPLACE PREVIOUSLY UPLOADED ATTACHMENTS:

Click the file name to: download, replace, rename, delete, or view version history.

File Name
STUDENT SURVEY.pdf Uploaded by: Catherine Scott On: 12/30/2013 At: 12:04 AM
INSTRUCTOR QUESTIONNAIRE.pdf

Manage Uploaded Attachment (Mouse over links for instructional text)

[Download](#) [Replace](#) [Rename](#) [Version History](#) [Delete](#)

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 [Version History](#)

To access the actions pop-up, click the [blue linked file name](#), then select desired action.