Create a Protocol: Procedures

**Work Instructions:**

1. Log into the Click Portal as a Principal Investigator.
2. Click on the IACUC tab in the top navigation menu.
3. Select your desired Research Team from the Research Teams tab.
4. From the Research Team workspace, click on the Procedures tab. All Procedures available to this Research Team will display.

   Procedures that are labeled as Standard under the Scope column, are commonly used procedures which have been pre-loaded into the procedure library by the IACUC for your use; these Procedures are available to any Research Team.

   If you need to create a Procedure specific to your own Research Team, you will need to create it yourself. Procedures you create will be labeled as Team Procedures under the Scope column and are only be available to your specific Research Team.

   - If the Procedure you require is already listed in the procedure library, review the Procedure's details to make sure that it is appropriate.
     - Click the Procedure's Name.
     - In the Procedure's workspace, click the View Procedure button.
     - Use the Continue button to scroll through the SmartForms.
     - If the Procedure is appropriate, you don't have to do anything. You will include it when you create your protocol. Click the Exit button to return to the workspace.
     - If the Procedure could be made appropriate by making a few minor changes, you can use the current Procedure as a template to create a new Procedure. Click the Exit button to return to the workspace and then click Copy Procedure.
       - Enter a new Name for the Procedure.
       - Select the applicable Research Team and click the OK button.
- Click the IACUC tab, and then select your chosen Research Team from the Research Teams tab.
- Click the Procedures tab and locate the copy by its Name. Click on the Name.
- Click the Edit Procedure button, make the necessary changes, and then click Finish.
  - The new Procedure will now be available when you create your protocol.

- If the Procedure you require is not listed, proceed to Step 4.

5. To create a Procedure, select your Research Team from the Research Teams tab and then click the Create Procedure button.

*Required information fields are marked with an asterisk (*)

- Complete the SmartForms.
  - Note that your answers may trigger other questions or pages to be added to the SmartForms for completion. For example, if for Question 2. Select procedure type you select Behavioral, the Behavioral Procedures page is added to the SmartForms.
- When done, click Finish. You will be taken back to the Research Team workspace. The new Procedure you created will now be available when you create a protocol.