University at Buffalo
The State University of New York

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.