# How to create/submit a new protocol:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Click on the “Create Protocol” button on the left hand side of the screen, under My Current Actions.
5. Navigate through the application using the Continue button, answering all the questions as you proceed.
6. When you have finished the application, click on the “Save” button and then hit “Finish” or “Exit” to go back to the Workspace.
7. To the left hand side of the screen, under My Current Actions, there should be a “Submit” button. Click on that button to send the protocol to the IACUC office for pre-review.

# How to create/submit a triennial review:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Find your protocol that needs to be renewed in the list of Submissions. Click on the title to open the workspace.
5. In the left hand column, under My Current Actions, there should be an Action button for “Create a Triennial Review.” Click on that button.
6. Navigate through the application using the Continue button, answering all the questions as you proceed.
7. When you have finished the application, click on the “Save” button and then hit “Finish” or “Exit” to go back to the Workspace.
8. To the left hand side of the screen, under My Current Actions, there should be a “Submit” button. Click on that button to send the triennial review to the IACUC office for pre-review.

# How to create/submit an annual review:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Find your protocol that needs to be renewed in the list of Submissions. Click on the title to open the workspace.
5. In the left hand column, under My Current Actions, there should be an Action button for “Create an Annual Review.” Click on that button.
6. Answer the questions on the following page regarding your use of animals over the past year. If your protocol involves category E procedures, the following additional information must be provided:
   1. Provide the number of animals used over the past year that underwent a category E procedure.
   2. Summarize monitoring procedures used for these animals. Indicate whether or not a monitoring chart/record is used. If so, provide a copy of the monitoring records. 1 example for each chart is sufficient—please see step #8 for more information.
   3. Indicate whether or not there were any unexpected occurrences, i.e., problems, deaths, and if so, were these occurrences reported to the LAF veterinary staff.
7. Hit ‘Save’ and then ‘Finish’ to go back to the Workspace.
8. If a monitoring chart/record is used to monitor category E animals, a sample completed chart must be provided. You can attach this by clicking on “Add Comment” on the left hand side of the screen, under My Current Actions.
   1. In the pop up window, make any comments that are necessary in #1. Click on “+ Add” in #2 to attach the chart and then click on “Ok” to post the comment.
9. To the left hand side of the screen, under My Current Actions, there should be a “Submit” button. Click on that button to send the annual review to the IACUC office for pre-review.

# How to create/submit an amendment:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Find your protocol that needs to be amended in the list of Submissions. Click on the title to open the workspace.
5. In the left hand column there should be an Action button for Create an Amendment.  Click on that button.
6. On the next page, answer the questions briefly describing the changes you are making and explaining why.  Hit Continue to move on to the protocol.
7. Scroll through the protocol pages until you get to the pages relevant to the change you are making. Make the appropriate changes to the protocol to fully describe the changes.
   1. If you are adding personnel, all new personnel should be added on the Protocol Team Members page and then have duties assigned to them on the Procedure Personnel Assignment page
8. Hit ‘Save’ and ‘Exit’ the amendment/protocol.
9. To the left hand side of the screen, under My Current Actions, there should be a “Submit” button. Click on that button to send the amendment to the IACUC office for pre-review.

# How to create a Substance:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Click on the button that says “Create Substance” on the left hand side of the screen.
5. Answer the 4 questions on the next page and click ‘Finish’ on the bottom right when you are done.

# How to edit a Substance:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Click on the word ‘Substances’ in the blue bar across the middle of the page.
5. Find your Substance that needs to be edited in the list of Substances. Click on the title to open the workspace.
6. Click on the “Edit Substance” button to the left hand side of the screen, under My Current Actions.
7. Make the appropriate edits on the next page, when you have finished, click ‘Save’ and then ‘Exit’ or ‘Finish.’

# How to edit a Procedure:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Click on the word ‘Procedures’ in the blue bar across the middle of the page.
5. Find your Procedure that needs to be edited in the list of Procedures. Click on the title to open the workspace.
6. Click on the “Edit Procedure” button to the left hand side of the screen, under My Current Actions.
7. Make the appropriate edits on the next page(s), when you have finished, click ‘Save’ and then ‘Exit’ or ‘Finish.’

# How to edit a Substance Administration Procedure: -Final Directions already done.

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Click on the word ‘Procedures’ in the blue bar across the middle of the page.
5. Find your Procedure that needs to be edited in the list of Procedures. Click on the title to open the workspace.
6. Click on the “Edit Procedure” button to the left hand side of the screen, under My Current Actions.
7. Make the appropriate edits on the next page(s), when you have finished, click ‘Save’ and then ‘Exit’ or ‘Finish.’ Please note that multiple Substances can be added to one procedure if they are administered at the same time or the same way as long as all the questions are answered for each Substance.

# How to edit an experiment:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Find your protocol, triennial review or amendment in the list of Submissions. Click on the title to open the workspace.
5. Click on “Edit Protocol”, “Edit Triennial Review” or “Edit Amendment” as appropriate.
6. Once inside the application, navigate to the Experiments page of the application.
7. Click on the title of the Experiment you wish to edit. In the window that pops up, make the changes that you need to. Hit “OK” when you have finished to close the window
8. Hit “Save” to save your changes and then “Exit” to close the protocol.

# How to add a Substance Administration Procedure to an existing experiment:

First, create all the Substances you will need for your project:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Click on the grey button that says “Create Substance” on the left hand side of the screen.
5. Answer the 4 questions on the next page and click ‘Finish’ on the bottom right when you are done.
6. Repeat steps #4-5 to create all the Substances you will use in your project.

Next you have to create Substance Administration Procedures to tie these Substances into the experiment:

1. When you have finished creating Substances, click on the grey button that says “Create Procedure” on the left hand side of the page.
2. Answer the questions on the next page—be sure to answer “Substance Administration” for #2. Then click Continue.
3. On the next page, to add Substances, click on the box that says “+ Add” to open a pop up window containing the Substances you previously made. Please note that multiple Substances can be added to one procedure if they are administered at the same time or the same way as long as all the questions are answered for each Substance. Click continue and then Finish on the next page.
4. If multiple procedures are needed, repeat steps #2 & 3 to return to the research team workspace and then steps #7-9 as necessary.

Lastly, you need to add the procedure(s) to the protocol:

1. Click on the word IACUC in the bar across the top of the page.
2. Click on your Research Team.
3. Find your protocol, triennial review, or amendment in the list of Submissions and click on the name of it to open the workspace.
4. Click on the grey box that says Edit Protocol, Triennial Review or Amendment in the upper left of the screen.
5. Click through the protocol pages by clicking on ‘Continue’ until you get to the Experiments page. Here, click on the name of the experiment to open the ‘Edit Experiment’ page.
6. Scroll down to questions #5 (Select Common Procedures) and #6 (Select Variable Procedures). Clicking on the grey box that says “…” for either question will open a window listing the procedures in your procedure library. Click the box next to the Substance Administration procedure(s) that you are adding to the experiment.
7. Scroll down to the bottom of the Edit Experiment window and hit “Okay” to confirm the addition of the procedure(s).
8. Repeat steps #15-17 for all applicable experiments.

# How to add a Substance to an existing experiment:

First, create all the Substances you will need for your project:

1. Log in to Click
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your Research Team.
4. Click on the grey button that says “Create Substance” on the left hand side of the screen.
5. Answer the 4 questions on the next page and click ‘Finish’ on the bottom right when you are done.
6. Repeat steps #4-5 to create all the Substances you will use in your project.

Next you have to create Substance Administration Procedures to tie these Substances into the experiment:

1. When you have finished creating Substances, click on the grey button that says “Create Procedure” on the left hand side of the page.
2. Answer the questions on the next page—be sure to answer “Substance Administration” for #2. Then click Continue.
3. On the next page, to add Substances, click on the box that says “+ Add” to open a pop up window containing the Substances you previously made. Please note that multiple Substances can be added to one procedure if they are administered at the same time or the same way as long as all the questions are answered for each Substance. Click continue and then Finish on the next page.
4. If multiple procedures are needed, repeat steps #2 & 3 to return to the research team workspace and then steps #7-9 as necessary.

Lastly, you need to add the procedure(s) to the protocol:

1. Click on the word IACUC in the bar across the top of the page.
2. Click on your Research Team.
3. Find your protocol, triennial review, or amendment in the list of Submissions and click on the name of it to open the workspace.
4. Click on the grey box that says Edit Protocol, Triennial Review or Amendment in the upper left of the screen.
5. Click through the protocol pages by clicking on ‘Continue’ until you get to the Experiments page. Here, click on the name of the experiment to open the ‘Edit Experiment’ page.
6. Scroll down to questions #5 (Select Common Procedures) and #6 (Select Variable Procedures). Clicking on the grey box that says “…” for either question will open a window listing the procedures in your procedure library. Click the box next to the Substance Administration procedure(s) that you are adding to the experiment.
7. Scroll down to the bottom of the Edit Experiment window and hit “Okay” to confirm the addition of the procedure(s).
8. Repeat steps #15-17 for all applicable experiments.

# How to Add a PI Proxy:

1. Please login to CLICK
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your research team.
4. Find your study that you want to name a proxy for.  Click on the title.
5. Click on “Assign PI Proxy” in the list of Current Actions on the left hand side of the screen.  A window will pop up.
6. In #1, click on the “…” to the right of the white rectangle to view a list of the team members.  In the pop up window, click the box to the left of the name to select that person.  Then hit OK in the bottom right of the window.
   1. If a person’s name does not appear in this list, they will need to be added to the list of Team Members:
      1. Click on the word IACUC in the bar across the top of the page.
      2. Click on your research team.
      3. Hit the “Edit Research Team” button in the left hand side of the screen, under My Current Actions.
      4. Under #3, click on “ + Add” to open a pop up window.
      5. Click on “…” to open a list of Click account holders.  Type the last name of your team member in the Filter box at the top of the page to shorten the list.  If your team member cannot be found in this list, they need to apply for a Click account, please ask them to go [here](https://pacs.buffalo.edu/SponsoredPrograms/sd/Rooms/DisplayPages/LayoutInitial?ForceLocalLogin=1&Container=com.webridge.entity.Entity%5bOID%5b0A7646F3B149874E902185897C144551%5d%5d) and fill out the Account Request section.  When you find your team member on this list, click the box to the left of their name and click OK.
      6. Click Finish in the Research Team Information window to complete the process.
7. Click OK in the bottom right of the Assign PI Proxy window to complete the process.

# How to Remove a PI Proxy:

1. Please login to CLICK
2. Click on the word IACUC in the bar across the top of the page.
3. Click on your research team.
4. Find your study that you want to remove a proxy for.  Click on the title.
5. Click on “Assign PI Proxy” in the list of Current Actions on the left hand side of the screen.  A window will pop up.
6. In that window, you will see a list of the current PI Proxies. Mouse over the name of the Proxy you wish to remove and click on the small X that appears to the right of the name. That should remove them from the list of Proxies.
7. Click OK to close the window. You should see the list of Proxies updated on the protocol workspace to reflect the change. If not, try refreshing the webpage.
8. You will need to repeat these steps for each protocol if you currently have multiple protocols with that person listed as Proxy.