

CLICK RESEARCH SOFTWARE

An Overview

 University at Buffalo
Research and Economic Development



hello

MY NAME IS

Tracie Groves
Training Programs Coordinator, RIS
traciegr@buffalo.edu
829-6650

Some Background about Click



The Click Portal is a comprehensive software for managing research and streamlining workflow and compliance for research.



The Click Portal was implemented to assist principal investigators, students, compliance and research administration staff with administering sponsored programs



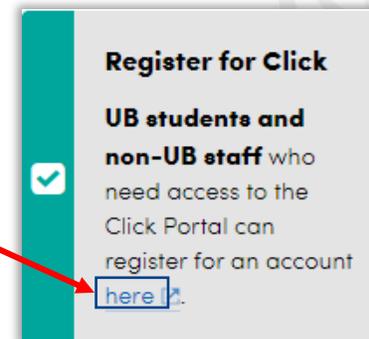
UB is leading the implementation of the Click Portal, working in collaboration with our vendor partner, Huron, and the Research Foundation's Leadership Team.

Getting a Click Account

Accounts are created for faculty and staff of the University at Buffalo for access to the Click Portal. Logging into the system will be done using their **UBIT Name** and **Password**.

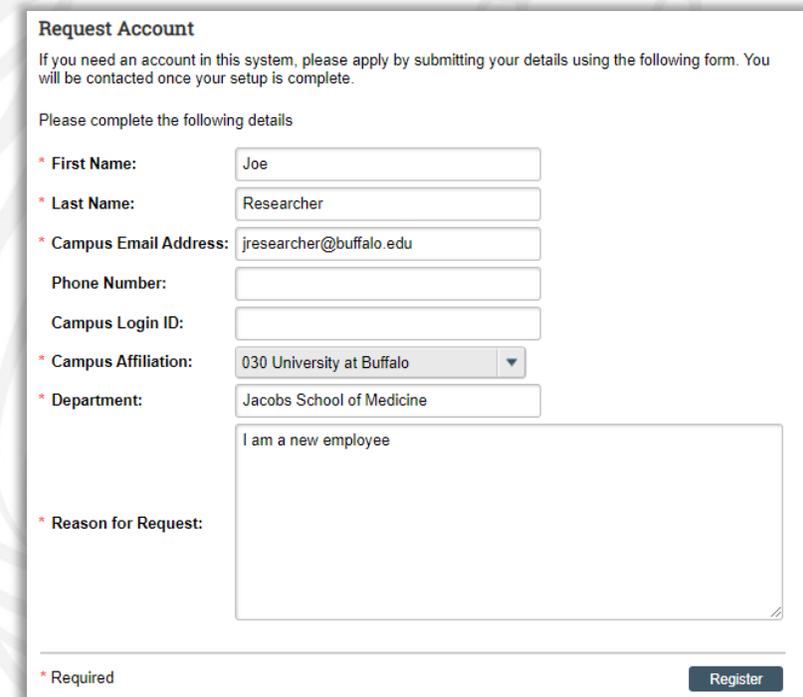
If you do not have an account, navigate to <https://www.buffalo.edu/research/research-services/training.html>.

1. Locate the **Register for Click** box on the right side of the page
2. Complete the **Request Account** form
3. Click the **Register** button.
4. You will receive an email notification when your account has been activated.



Register for Click
UB students and non-UB staff who need access to the Click Portal can register for an account [here](#).

A red arrow points from the 'here' link to the 'Request Account' form on the right.



Request Account
If you need an account in this system, please apply by submitting your details using the following form. You will be contacted once your setup is complete.

Please complete the following details

* First Name:

* Last Name:

* Campus Email Address:

Phone Number:

Campus Login ID:

* Campus Affiliation:

* Department:

* Reason for Request:

* Required

Logging In

The screenshot shows a web browser window with the following elements:

- Browser tabs: Google Search, PowerPoint Presentation, UBITName Login: Authentication.
- Address bar: shibboleth.buffalo.edu/idp/profile/SAML2/Redirect/SSO?execution=e1s2
- Header: University at Buffalo The State University of New York
- Main content: "Login Required" section with a blue notification bar: "Password resets required for some accounts in 2023. [More >](#)"
- Form fields: "UBITName" and "Password" (with a lock icon).
- Button: "Log In"
- Links: "I don't know my password", "Find my UBITName", "Help"
- Taskbar: Windows taskbar with icons for File Explorer, Chrome, Edge, Teams, Outlook, PowerPoint, and a second Chrome instance. System tray shows time 1:44 PM and date 3/16/2023.

For UB Personnel: Use your **UBitname and password** to access the Click Portal.

If you don't know your name / password or you need to reset your password, please contact UB CIT at ubithelp@buffalo.edu or call 716 645-3542 for help.

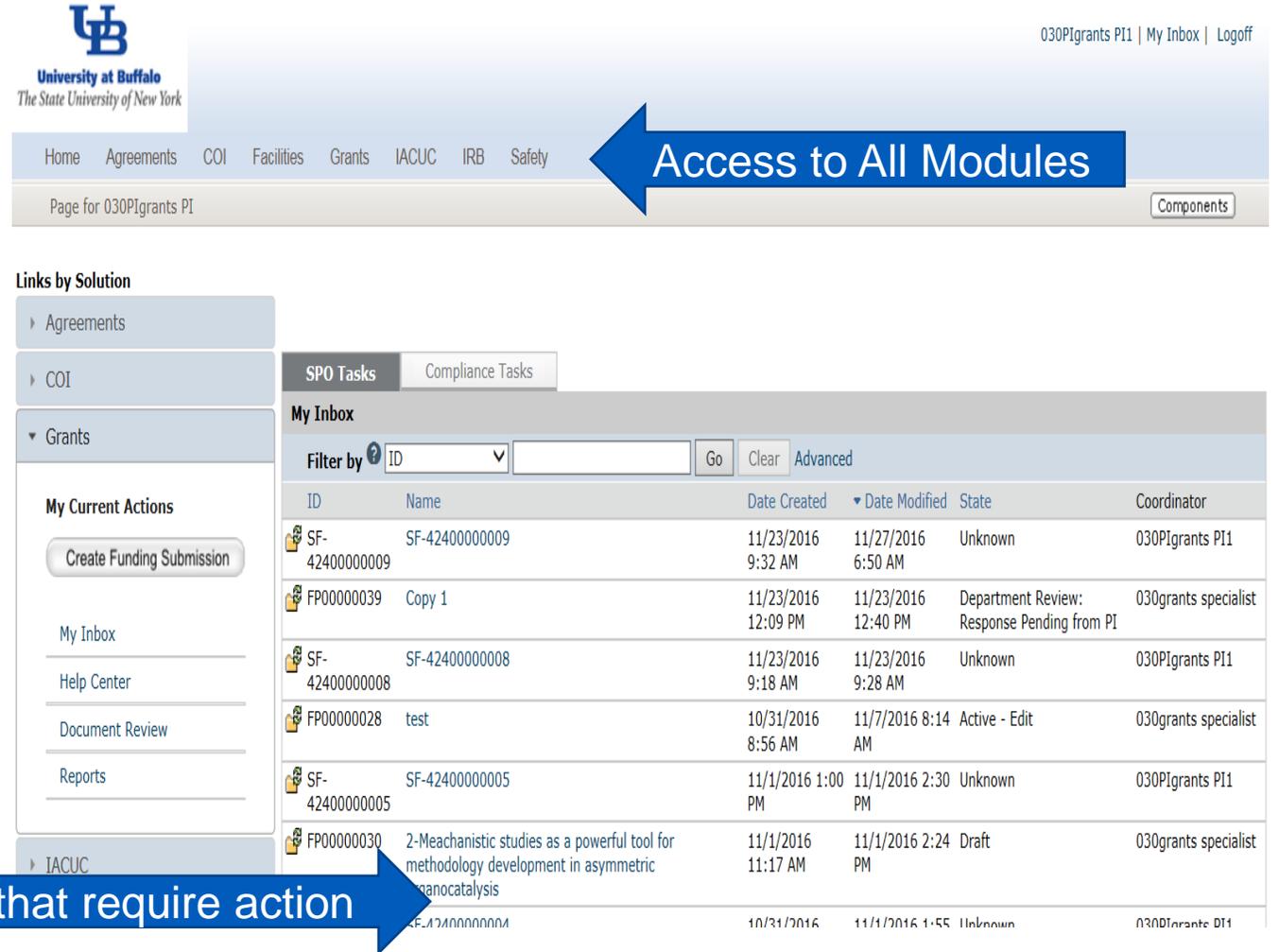
My Inbox

Each time you log into the **Click Portal**, you will be taken to your **Inbox**. This area of the portal contains a list of all submissions that currently require you to take an action.

My Inbox is divided into two tabbed pages:

- **SPO Tasks** -contains a list of your Agreements and COI Disclosures that currently require you to take an action.

- **Compliance Tasks** -contains a list of all your submissions that currently require you to take an action.



030PIgrants PI1 | My Inbox | Logoff

Home Agreements COI Facilities Grants IACUC IRB Safety

Page for 030PIgrants PI Components

Access to All Modules

Links by Solution

- Agreements
- COI
- Grants
 - My Current Actions
 - Create Funding Submission
 - My Inbox
 - Help Center
 - Document Review
 - Reports
- IACUC

SPO Tasks Compliance Tasks

My Inbox

Filter by ID Go Clear Advanced

ID	Name	Date Created	Date Modified	State	Coordinator
SF-4240000009	SF-4240000009	11/23/2016 9:32 AM	11/27/2016 6:50 AM	Unknown	030PIgrants PI1
FP00000039	Copy 1	11/23/2016 12:09 PM	11/23/2016 12:40 PM	Department Review: Response Pending from PI	030grants specialist
SF-4240000008	SF-4240000008	11/23/2016 9:18 AM	11/23/2016 9:28 AM	Unknown	030PIgrants PI1
FP00000028	test	10/31/2016 8:56 AM	11/7/2016 8:14 AM	Active - Edit	030grants specialist
SF-4240000005	SF-4240000005	11/1/2016 1:00 PM	11/1/2016 2:30 PM	Unknown	030PIgrants PI1
FP00000030	2-Mechanistic studies as a powerful tool for methodology development in asymmetric organocatalysis	11/1/2016 11:17 AM	11/1/2016 2:24 PM	Draft	030grants specialist
SF-4240000004	SF-4240000004	10/31/2016	11/1/2016 1:55	Unknown	030PIgrants PI1

Submissions that require action

When you first log in to Click, you will be taken to the **Inbox**

- From My Inbox, you will see:
1. Submissions that require action
 2. State in the research workflow

Click
a Huron solution

Rebecca Simms (pi)(demo) | My Inbox | Logoff

Home Agreements COI Facilities Grants IACUC IRB Safety

Page for Rebecca Simms (pi)(demo) Components

Links by Solution

- Agreements
- COI
- Grants
- IACUC
- IRB
- Safety

Compliance Tasks SPO Tasks

My Inbox

Filter by ID Go Clear Advanced

ID	Name	Date Created	Date Modified	State	Coordinator
CR00000001	Continuing Review for Study STUDY00000004	6/5/2015 6:26 PM	6/9/2015 2:55 AM	Clarification Requested (Pre-Review)	Orlando Max (irbc)(demo)
AMEND201500001	Amendment for PROTO201500004	6/5/2015 7:55 PM	6/5/2015 7:55 PM	Pre-Submission	
PROTO201500002	rDNA for Mice	6/2/2015 7:07 PM	6/3/2015 3:23 PM	Pre-Submission	
PROTO201500001	DNA for Mice	6/2/2015 7:07 PM	6/2/2015 7:07 PM	Pre-Submission	
STUDY00000001	ER Re-Admission Study	6/1/2015 9:27 PM	6/2/2015 7:03 PM	Pre-Submission	

5 items page 1 of 1 25 / page

Workspaces

The Workspace displays key information about a particular submission.

This is where you can find:

- Details regarding the submission
- State in the research workflow
- Actions that can be taken in the current state
- Tabs with information regarding:
 - **History**
 - **Attached documents**
 - **Important contacts**
 - **Submission information**

1. **Header** - Links to your profile and My Inbox, and lets you log off

2. **Top navigation menu** - Links to the different modules within Click Portal

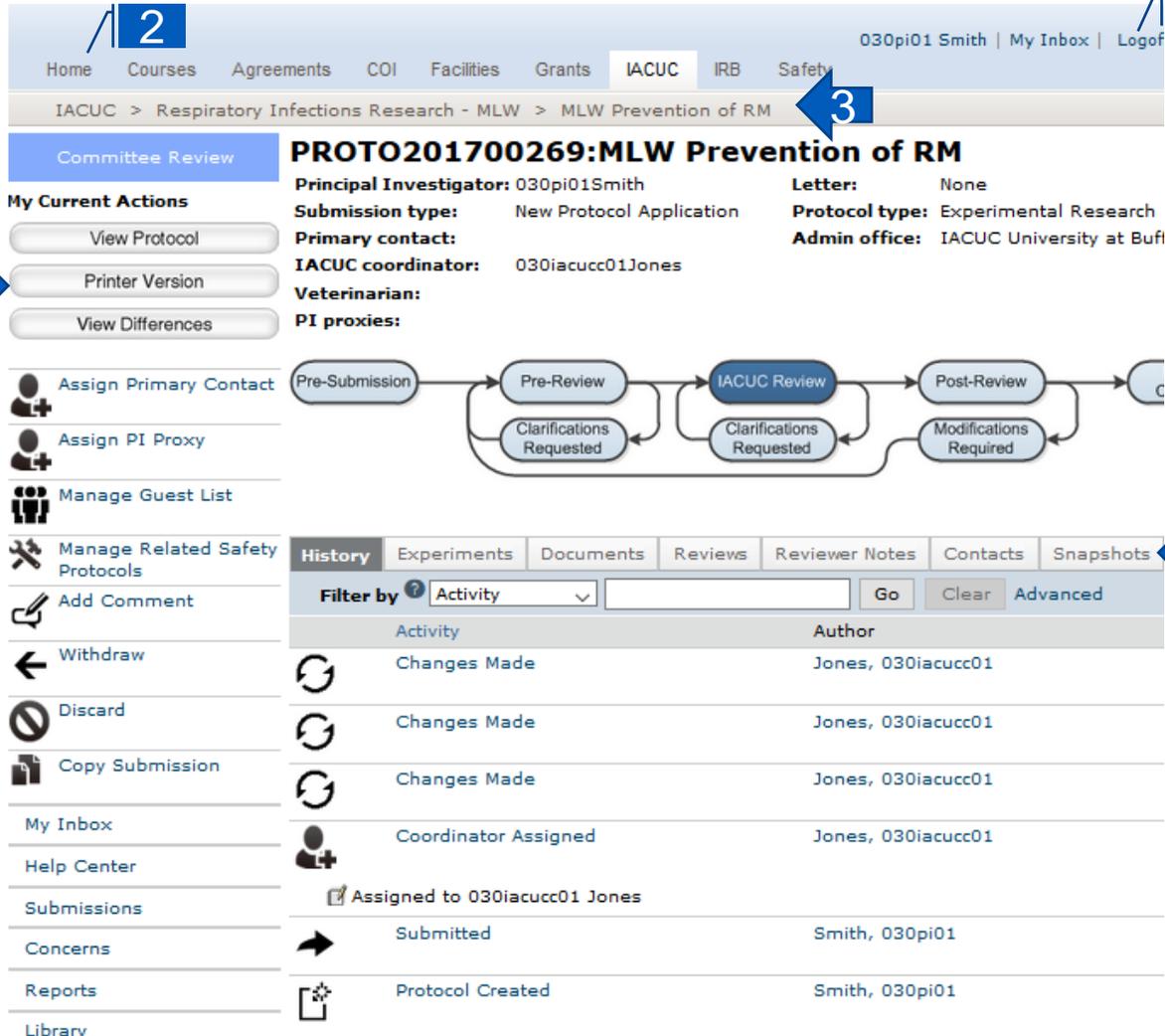
3. **Breadcrumb navigation menu** - Enables you to move quickly to a previous location

4. **Activities** - Actions that can be taken based on a submission's current State

5. **Resource tabs** - Collected information regarding the submission

6. **History** - Actions taken previously on this submission

7. **Shortcuts** - Quick links to other frequently used areas of the module



The screenshot shows the IACUC portal interface for a submission titled "PROTO201700269:MLW Prevention of RM".

- 1**: Header area showing user profile "030pi01 Smith" and "My Inbox" link.
- 2**: Top navigation menu with links for Home, Courses, Agreements, COI, Facilities, Grants, IACUC, IRB, and Safety.
- 3**: Breadcrumb navigation menu showing the path: IACUC > Respiratory Infections Research - MLW > MLW Prevention of RM.
- 4**: "My Current Actions" sidebar with buttons for View Protocol, Printer Version, and View Differences.
- 5**: "History" section with tabs for Experiments, Documents, Reviews, Reviewer Notes, Contacts, and Snapshots. A filter is set to "Activity".
- 6**: "History" table listing actions and authors.
- 7**: "Shortcuts" sidebar with links for My Inbox, Help Center, Submissions, Concerns, Reports, and Library.

Activity	Author
Changes Made	Jones, 030iacucc01
Changes Made	Jones, 030iacucc01
Changes Made	Jones, 030iacucc01
Coordinator Assigned	Jones, 030iacucc01
Assigned to 030iacucc01 Jones	
Submitted	Smith, 030pi01
Protocol Created	Smith, 030pi01

SmartForms

You Are Here: PI1 - Cinnamon and type 2 diab...

View: IRB Submission - STUDY00000754

<< Back

Continue >>

Basic Information

1. * Title of study:

PI1 - Cinnamon bark, water-soluble cinnamon extract, and metformin as initial treatment for type 2 diabetes mellitus

SmartForms are a series of forms where you input specific information about a study. Based on your responses, it will determine what form/ questions to complete next.

3. * Brief description:

We are studying whether or not cinnamon bark or water-soluble cinnamon is an effective nutraceutical for the initial treatment of diabetes when compared to standard therapy of metformin 1000 mg (extended-release). This study will enroll 309 patients in randomized, doubled-blind, clinical trial and should be complete in a little over a year. Once consented, all subjects will have hemoglobin A1C, lipid panel, height, weight, and waist

These smart forms improve the efficiency and completion of research submission and review

4. * Principal investigator:

Rebecca Simms (pi)(030)

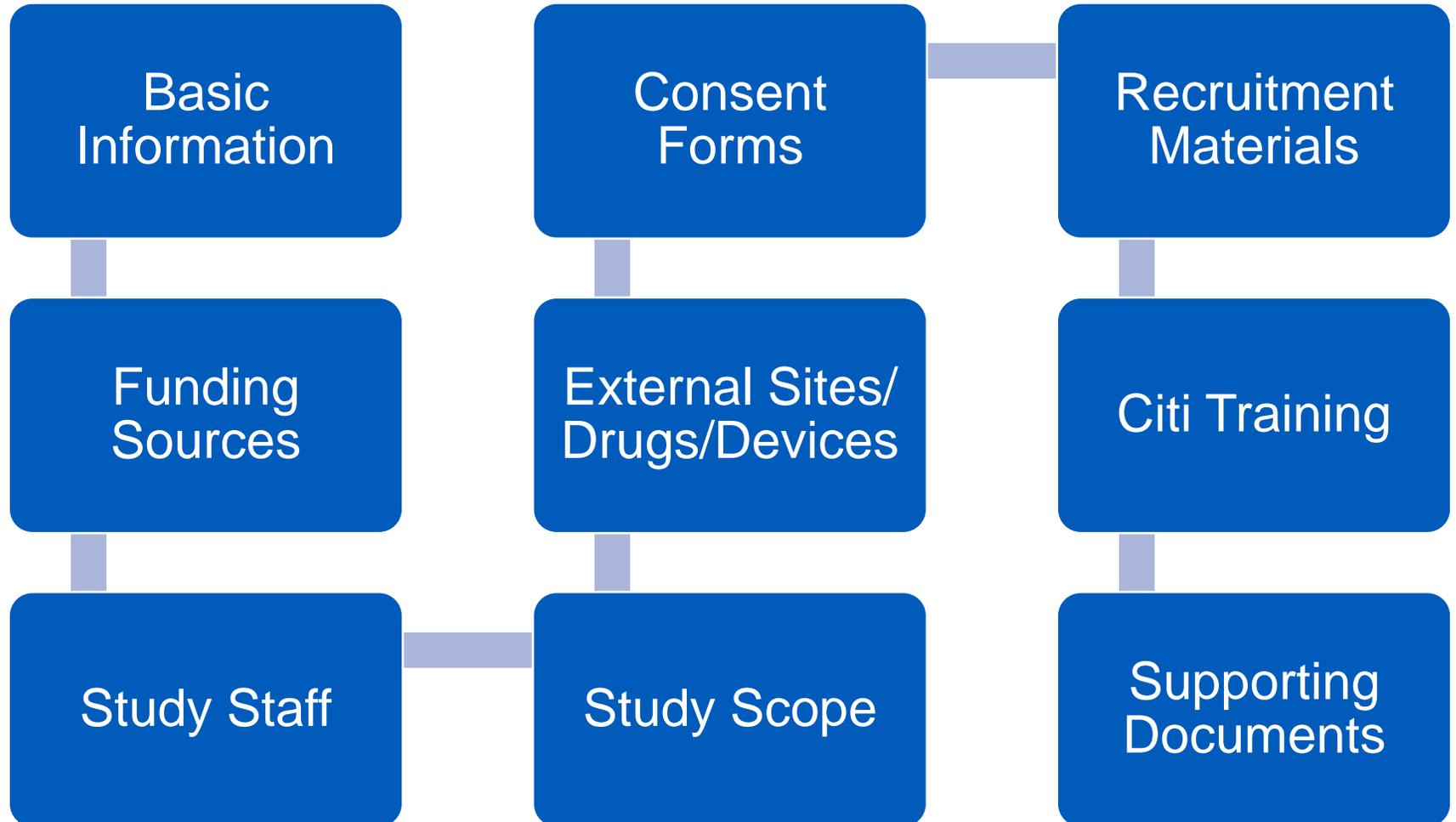
5. * Does the investigator have a financial interest related to this research?

Yes No

Important! Completing elements of the SmartForm or Clicking "Finish" does not send a submission for review. The PI must click "Submit" on the workspace after completing the smartforms to proceed on for the next state of review

New Study Entry

IRB SmartForms



There are a series of SmartForms for each module of Click. When entering information for a new study, these SmartForms will guide you to input specific information about the study. They will help ensure that you enter all relevant information.

Smartform Basics

On the SmartForm pages, you will see:

1. Required fields (red asterisk)
2. Field help
3. Navigation bar (save or exit)
4. Jump to other pages in protocol
5. Ensure all required fields are completed

The screenshot shows a web form titled "Basic Information" with a navigation bar at the top containing "<< Back", "Save | Exit | Hide/Show Errors | Print...", and "Jump To: - Basic Information". The form contains the following fields:

- 1. * Select research team:** A dropdown menu with "Spine Research Team" selected. A blue arrow labeled "1" points to the asterisk.
- 2. * Title of protocol:** A text area containing "Spine research in animals". A blue arrow labeled "2" points to the asterisk.
- 3. * Short title:** A text input field containing "Spine research in animals". A blue arrow labeled "3" points to the asterisk.
- 4. * Non Scientific Summary of Research:** A text area containing "Spine research in animals". A blue arrow labeled "4" points to the asterisk.
- 5. * Principal Investigator:** A text input field containing "Rebecca Simms (pi)(030)", a "Select..." button, and a "Clear" button. A blue arrow labeled "5" points to the asterisk.
- 6. * What is the intention of the animal protocol?:** A radio button group with options: "Breeding Only", "Experimental Research" (selected), "Field Research", "Holding Protocol", and "Teaching/Training". A "Clear" button is below. A blue arrow labeled "6" points to the asterisk.

At the bottom, the navigation bar is repeated with "<< Back", "Save | Exit | Hide/Show Errors | Print...", and "Jump To: - Basic Information".

Filtering and Sorting Data

Many pages contain tables you can filter and sort to help you find the data you want.

- Filtering reduces the list to only the data that meets the criteria. The advanced filter lets you combine multiple filter criteria together.
- Sorting displays the data in ascending or descending order by a particular column.



NOTE: To combine multiple filter criteria, such as *ID number*, *Name*, and *Date Created*, use the Advanced Filters.

Filtering Data

1. Select the column to **Filter by** from the drop-down menu. The menu lists only the columns you can **Filter by**.
2. In the next box, type the beginning characters for the items you want to find. If you do not know the beginning characters, type a % symbol as a wildcard before the characters.



Filter by  ID

3. Click **Go** to apply the filter. The table shows only those rows that are an exact match. If you do not see the expected items in the list, click **Clear** in the **Filter by** area to remove the filter.



Filter by  Protocol ID

NOTE: For examples and a list of operators you can use, click the **Help** icon.

The Click Portal

Click automates the submission, review, and approval processes while managing all major administrative aspects of the research and compliance lifecycle:



Improves research submission efficiency with 6 Modules that integrate with one another.

The Click Portal Assists 6 Aspects of Research Management

The screenshot shows the Click Portal interface for the University at Buffalo. The navigation bar includes links for Home, Agreements, COI, Facilities, Grants, IACUC, IRB, and Safety. The user is logged in as Rebecca Simms (pi)(030). A callout box on the right states "6 Modules Make up Click", with dashed arrows pointing to the navigation links for Agreements, COI, Grants, IACUC, IRB, and Safety. The main content area is titled "Links by Solution" and lists the same six modules. Below this, there are tabs for "SPO Tasks" and "Compliance Tasks", and a "My Inbox" section with a filter dropdown set to "ID".

ID	Name	Date Created
FP00000013	test	6/30/2016 6:27 PM
DC00000004	Annual Disclosure Certification for Rebecca Simms (pi)(030) 2016	4/13/2016 3:57 PM
030TRA00000004	TRA 10-5-2016	10/5/2016 1:52 PM

Agreements Module

- ❖ Provides electronic system for management of research-related contracts and agreements.
- ❖ Includes:
 - Sponsored Research Agreements
 - Material Transfer Agreements
 - Clinical Trial Agreements
 - Non-Disclosure Agreements
 - Other documents useful for reviews and negotiation

Benefits:

- Customized submission forms for various agreement types
- Eliminates the risk of storing information in individual email accounts
- Interfaces with other modules - simple tracking of relationships to studies and grant awards



Two offices at UB provide oversight for the agreements process:

- ❖ The Office of Sponsored Projects Services (SPS) assists researchers to prepare and submit proposals for sponsored funding and provides management of awarded funds to ensure compliance with applicable regulations and policies.
- ❖ The Office of Science, Technology Transfer, and Economic Outreach (STOR) negotiates and executes all Material Transfer Agreements (MTA) and Non-Disclosure Agreements (NDA) in keeping with the university's research guidelines and its obligations to federal research sponsors.



From Agreements Tab, In All Agreements, you will see:

1. All submissions to the Agreements module
2. State in the review process
3. Shortcut to reporting features
4. Shortcut to user guides and videos

Click
a Huron solution

Home Agreements IRB Safety

Agreements

Create Agreement

Reports

Help Center

All Agreements Unassigned New In Progress Active Evergreen

Filter by ID Go Clear Advanced

ID	Name	Agreement	Agreement Type	PI (First)	PI (Last)	Contracting Party	Status
030MTA00000028	MLW Sample Agreement 2/17/2016	South_Campus_Map.pdf(1.0)	Material Transfer Agreement	Tyra	McClure (ubao-mgr1)	Fund for Public Health in New York	Internal Review
030MTA00000024	MLW Agreements	South_Campus_Map.pdf(1.0)	Material Transfer Agreement	Principal Investigator5		011 Clinical Trials Office	Unassigned
030SRA00000002	mk SRA 1.20.16 test for ancillary reviewer	For Agreements Testing.docx(1.0)	Sponsored Research Agreement	Tyra	McClure (ubao-mgr1)	MK works	Internal Review

Clicking on the hyperlinked ID will take you to that Agreement's **Workspace**



Click a Huron solution
 Home | Agreements | IRB | Safety
 Agreements > MLW Agreements

Unassigned | **030MTA0000024 : MLW Agreements** ← 1
 Agreement: South_Campus_Map.pdf(1.0) | History
 Final Agreement:
 Supporting Documents: South_Campus_Map.pdf

Submitted by: Principal Investigator5
 Owner:
 Created: 2/1/2016 3:15 PM
 Received: 2/1/2016 3:28 PM
 Modified: 2/17/2016 12:58 PM
 Effective:
 Expires:

Pre-Submission → Unassigned → In Review → Signing → Active
 (Clarification Requested loops between Unassigned and In Review)

My Current Actions
 Edit Agreement
 Printer Version
 View Differences
 View All Correspondence

Assign Owner
 Un-assign Owner
 Manage Ancillary Reviews
 Submit Ancillary Review Reminder
 Email Agreement
 Request Clarifications
 Log Correspondence
 Void
 Revise Agreement
 Copy Agreement
 Generate Agreement

Communication | **History** | Contacts | Snapshots
 Filter by: Activity [dropdown] [Go] [Clear] Advanced

Activity	Author	Activity Date
Agreement Type Changed	McClure (ubao-mgr1), Tyra	2/5/2016 4:43 PM
Submitted	Investigator5, Principal	2/1/2016 3:28 PM
Changes Made	Investigator5, Principal	2/1/2016 3:18 PM
Changes Made	Investigator5, Principal	2/1/2016 3:17 PM

↑ 2 ↙ 4

The Agreements Workspace will have:

1. Agreement details
2. The state in the review process
3. Actions you can take in the agreement's state
4. Tabs with information about the history of the agreement

Principal Investigators (PI)s can:

1. Create the agreement and complete the SmartForm pages
2. Submit the agreement for review

Links by Solution

- Agreements
 - My Current Actions**
 - Create Agreement
 - All Agreements
 - Reports
 - HelpCenter
- IRB
- Safety

Compliance Tasks | SPO Tasks

My Inbox

Filter by ID

My Current Actions

- Edit Agreement
- Printer Version
- View Differences
- View All Correspondence
- Submit**
- Assign PI Proxies

COI Module

- Provides electronic system for management of research-related conflict of interest (COI) disclosures.
- Ensures the prevention of bias/ Helps avoid a circumstance in which a researcher's personal interest or relationships might compromise the integrity of research at the University
- The Compliance Team and Conflict of Interest Officer carefully review these disclosures, effectively manage any conflicts, and report to appropriate federal agencies as needed.
- Each Investigators must submit a Disclosure Statement that includes information pertaining to their significant financial interests (SFIs) and any sponsored travel that may be related to their research:
 - when submitting a grant application for research
 - prior to submitting human subject protocols for review
 - annually
 - immediately upon of discovering or acquiring a new SFI.

Rebecca Simms (pi)(030) | My Inbox | Logoff

Home | Agreements | **COI** | Facilities | Grants | IACUC | IRB | Safety

COI Submissions > Annual Disclosure Certification for Rebecca Simms (pi)(030) 2016

Review Complete: Preparing Correspondence

Type: Annual Certification | ID# DC00000419 Discloser: **Rebecca Simms (pi)(030)** | Phone:

My Current Actions

View Disclosures

Printer Version

 Manage Ancillary Reviews

 Log Comment

My Disclosures

Meetings

Reports

COI Discloser Quick Reference

COI Advanced Reports Reference

COI QuickStart Guide

Summary | History

Notes to Discloser

Your disclosures are currently under review. Please check your email account, listed in the system as , for any communication regarding the status of review. If further action is required, you will be notified at the above listed email address, and will have to log back into this system.

Summary

Last COI Training Date: 9/9/2013

Management Plan:

Snapshot:

Date Submitted: 8/3/2016

Review Due Date: 10/2/2016

Routing Information

Discloser has a Significant Financial Interest: Yes

Discloser is Involved in Research: Yes

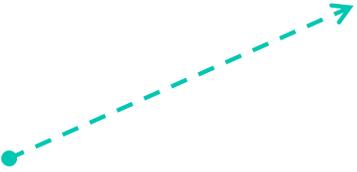
Discloser has Institutional Responsibilities: Yes

Discloser has Significant Obligations: Yes

Needs Review: Yes

My Disclosures

Export



Benefits:

- Ensures consistent processes
- Eliminates redundant data input by connecting COI input to study protocols and awards
- Fosters a culture of transparency

Two Different Types of Disclosures

CONFLICT
OF INTEREST



Annual and Research Certification COI

What's the difference?

- An annual financial disclosure is submitted once a year through the COI module of CLICK
- The annual disclosure should be updated whenever you have a change to the one on file
- The research certification is done for EACH study submitted to the IRB to attest to your level of conflict of interest with the specific sponsor of the research

My Disclosures

You may navigate directly to the COI module by clicking the **COI** tab in the navigation menu at the top of the screen.

The screenshot shows the University at Buffalo COI module interface. The navigation menu at the top includes My Inbox, Awards, Courses, Agreements, COI, Grants, IACUC, IRB, and Safety. The COI tab is highlighted with a yellow arrow. Below the navigation menu, there are sub-tabs for COI Meetings and COI Reports. The main content area shows a table of COI certifications with columns for ID, Name, First Name, Last Name, Type, and Status. A red arrow points to the 'View My Certification' button, and a yellow arrow points to the 'My Disclosures' link in the left sidebar.

ID	Name	First Name	Last Name	Type	Status
DC00031785	Update to Principal Investigator (pi1)'s disclosures 3.30.2020	Principal	Investigator (pi1)	Disclosure Update	Administrative Review

The **My Disclosures** area is divided into three tabs:

- **All Certifications** - All of your disclosure certifications, regardless of state.
- **Administrative-Review** - All of your COI annual disclosure certifications currently under review.
- **Under Management Plan** - All of your disclosures that are currently under a Management Plan.

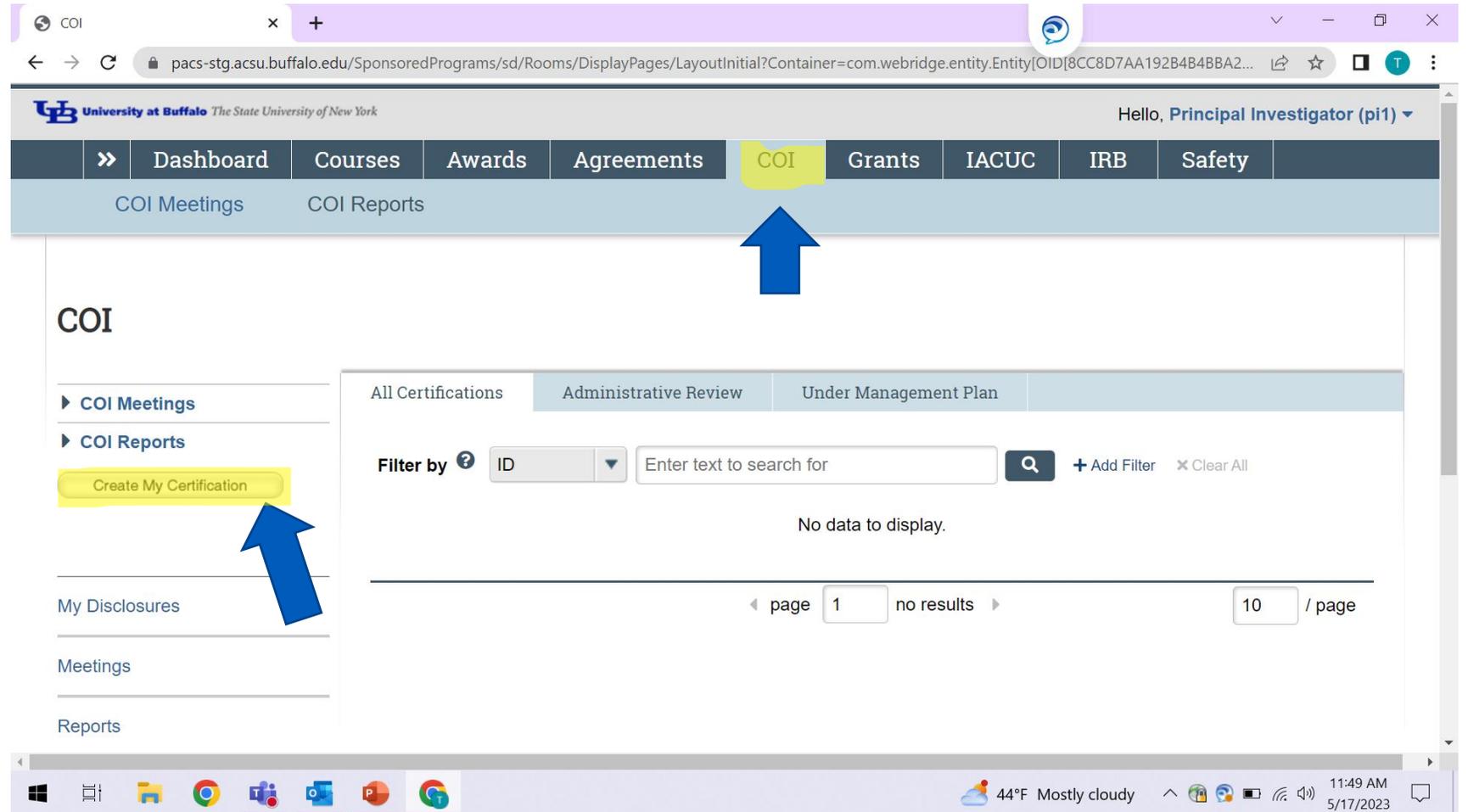
Getting Started

Click on the **link** that you is emailed to you, and it should take you directly to your certification.

If you do not have the link, In the COI tab, Click on **Create My Certification**.

If you have already started but not submitted your Disclosure, this button will read **Edit My Certification**.

or **View My Certification** if it has already been Submitted for review.



Click COI Module

The COI Module provides an electronic system for management of research-related conflict of interest disclosures. It ensures the prevention of bias and helps avoid a circumstance in which a researcher's personal interest or relationships might compromise the integrity of research at the University.

If you do not have a Click account, you can request access here:

<https://www.buffalo.edu/research/research-services/click-implementation.html>.

If you do not have access to your annual COI, you can request help here:

<https://www.buffalo.edu/research/about-us/staff-directory/ris/request-it-help.html>

UB's annual filing deadline is Nov. 1.

November



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11 Women's Day	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26 Thanksgiving Day	27	28
29	30	1	2	3	4	5

Grants Module

Benefits:

- Ensures submissions are accurate and complete
- Standardizes budget preparation and review
- Integrates with existing accounting and HR systems

- Provides electronic system for the management of grant award applications, budgets, milestones, contract terms, sub-recipients, and compliance status.
- Ensures consistent processes and reminders to researchers and staff for pending work items
- Integrates grant processes with key compliance issues such as IRB and COI
- The Office of Sponsored Projects Services (SPS) helps develop grant proposals, reviews and submits sponsored funding proposals, and assists in managing grant awards.

Grants Home Page Inbox

Create Funding Submission

My Inbox

Help Center

Document Review

Reports

Grants

All Single Proposals

All Awards

All Subawards

Filter by ?

ID

Enter text to search for



+ Add Filter

✕ Clear All

ID	Name SmartForm	Date Modified	State	PI	Specialist	Submitting Department	Primary Sponsor	Submission Type
FP00007521	test 2 [Edit]	1/23/2024 9:43 AM	Draft	Investigator (pi1)	CARUSO	030 Academic Affairs	1000 Islands Land Trust	New
FP00007477	Test1 [Edit]	1/23/2024 9:33 AM	Draft	Investigator (pi1)	CAVARETTA	030 Architecture	2A Pharma	New

2 items

◀ page 1 of 1 ▶

25 / page

Reminder:
Only a PI
will see this
button

Proposal Workspace

test 2

FP00007521

Funding Proposal

Draft

Edit Funding Proposal

Printer Version

View SmartForm Progress

Create Document Review

Credit Distribution

My Current Actions

← Withdraw Proposal (Prior to submission to sponsor)

 Manage Proposal Access Rights

 Create Additional Budget

➔ Submit for Individual or Department Review

 Email Specialist

Project Information

Budgets

Internal Attachments

SF424 Summary

Contacts

Financials

Change Log

...

PROPOSAL INFORMATION

PD/PI:	Principal Investigator (pi1)
Department/Institute/Center:	030 Academic Affairs
Specialist:	ALYSSA CARUSO
Direct Sponsor:	1000 Islands Land Trust /
Prime Sponsor:	
Proposal Due Date:	1/23/2024
Opportunity ID:	undefined
SF424:	
Date Submitted to Sponsor:	
Summary Abstract:	

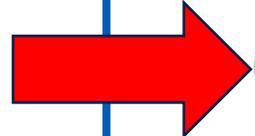
BUDGET INFORMATION

Start Date:	1/23/2024
End Date:	1/22/2029
Number of Periods:	5
Requested Total Direct:	\$0
Requested Total Indirect:	\$0
Requested Total:	\$0
HAS COST SHARING:	No
Uploaded Budget:	View



Creating a Funding Proposal

1. From **My Inbox** in the Grants Tab, click **Create Funding Submission**
2. Fill out each page. Click **Continue** to move through the pages.



Grants

[All Single Proposals](#)
[All Awards](#)
[All Subav](#)

Filter by ? ID

ID	Name SmartForm	Date Modified	Stat
FP00007477	Test1 [Edit]	5/11/2023 3:22 PM	Draft

1 items

Creating New: Funding Proposal

Proposal Description & Contacts

1.0 * Title of the proposal:

For NIH, maximum 200 characters allowed.

2.0 * Program Director / Principal Investigator / Project Lead / Mentor:

Principal Investigator (pi1)

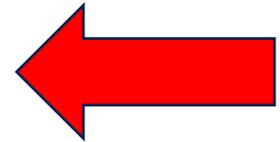
If a fellowship, please identify the Fellow:

For single proposals:
 Upload the following PDF documents pertaining to the PD/PI/Fellow:
 - Biosketch

*** Note: Other Support:**
 Not usually required.
 Please refer to the Funding Announcement to see if this is required.

COI Disclosure: [None]

Biosketch: [None]



Completion Instructions:

1.0

Congratulations! You have just finished Step 1 of the Click Grants Funding Proposal process. Select Finish to go back to the workspace. **To complete the process, follow instructions for Steps 2 - 4.**

Step 2: Budget Section

The budget section is located in the Budgets tab above the "Proposal Information" in the workspace; total direct and total indirect dollar amounts need to be entered in order for this form to be approved during the department review. Click [HERE](#) to watch a video on the budget section.

Step 3: Credit Distribution

The Credit Distribution is located on the left hand menu right above "My Current Actions". Click [HERE](#) to watch a video on the credit distribution.

NOTE: If you are using Safari you will need to switch to Internet Explorer, Firefox, or Chrome to complete this step.

Step 4: Submit for Routing

To submit your Funding Proposal for routing click "Submit for Individual or Department Review" located under the "My Current Actions" menu on the left hand side of the workspace.

 Exit

 Save

Finish

Edit Rights

Located at the bottom of the page (question 7.0) under **Proposal Access Rights Definition**

Users that can edit the Funding Proposal and Budget.

Typically, departmental staff/coordinators.

They will not receive any email notifications from the Grants module.

You are not required to add anyone to this section.

If you are filling out a Funding Proposal for the PI, add yourself to **EDIT** rights **before** changing the PI name or else you will be kicked out of the Smart Forms

If you are filling this out for a PI (not yourself) fill out this section with your name before changing the PI to the correct person in 2.0 Program (Director / Principal Investigator / Project Lead / Fellow)

Are there other personnel associated with this funding proposal (including its co-investigators and department staff) who will be included on the budget?
● Yes ○ No [Clear](#)

- General Information
- Proposal Description & Contacts**
- Additional Personnel
- General Proposal Information
- Research Department Determination
- Compliance Review
- Export Control
- Program Classification
- Non Federal Grant Information
- Submission Information

7.0 Proposal Access Rights Definition:

7.0

Select team members that have EDIT rights:



These users have READ and EDIT access to the funding proposal.

Last Name	First Name	Email
-----------	------------	-------

There are no items to display

8.0

Select team members that have READ only rights:

These users have READ access to the funding proposal.

Last Name	First Name	Email
-----------	------------	-------

There are no items to display

Exit Save Continue

IACUC Module

- Provides electronic system for management of the use of animal subjects in scientific and educational activities.
- Provides access to species, procedure, substance, training information and inspections
- Assists in the creation of reports
- The Institutional Animal Care and Use Committee (IACUC) reviews and approves all animal research to maintain nationally established standards to ensure that the University's research methods are ethical and compliant.





- ✓ Create a **Research Team**.
- ✓ Each **Research Team** will then have **Substances and Procedures** associated with it.
- ✓ Each **Research Team** will have its own **Protocols** with **Experiments, Substances and Procedures** associated with it.

Creating a Protocol

To begin the process of creating a **Protocol**, please complete the following steps:

1. Click the **IACUC** tab in the top navigation menu.
2. Select your desired **Research Team** from the **Research Teams** tab. Individuals listed in this **Research Team** will be imported into the personnel section of the **Protocol** you create.
3. Click the **Create Protocol** button.

My Current Actions

Edit Research Team

Create Protocol

Create Procedure

Create Substance

Create Building Blocks

Before you create a protocol, the **Building Blocks** for a protocol must be created in a specific order:

1. Create your **Research Team**
2. Create **Team Substances**
3. Create **Team Procedures**

If the system does not already contain the **Substance** or **Procedure** that you need for your protocol, you will need to create it yourself.

Once created, it will be saved and can be used again in any of your **Research Team's** future protocols. It will not be viewable or available to anyone who is not on the **Research Team**.

Research Team Workspace

The screenshot shows the IACUC Research Team Workspace for the Embolization Research Team. The interface includes a navigation menu at the top with options like Home, Courses, Agreements, COI, Facilities, Grants, IACUC, IRB, and Safety. The user is logged in as Rebecca Simms (pi)(030). The main content area is titled "Embolization Research Team" and shows the Principal Investigator's details: Rebecca Simms (pi)(030), Phone: 716-645-5000, and E-mail: ovpr.clicktesting@buffalo.edu. A sidebar on the left lists "My Current Actions" (Edit Research Team, Create Protocol, Create Procedure, Create Substance) and "My Inbox" (Help Center, Submissions, Concerns, Reports, Library). A table of submissions is displayed, with columns for ID, Name, Date Modified, State, and Submission Type. The table shows two items: PROTO201600042 (Sample IACUC Protocol, Post-Review, New Protocol Application) and PROTO201700010 (TD - Test Protocol - Ancillary Review, Pre-Review, New Protocol Application). The page shows 2 items on page 1 of 1. Numbered callouts indicate: 1. The "Submissions" tab; 2. The "Advanced" filter options; 3. The Principal Investigator's name; 4. The "My Current Actions" sidebar.

Rebecca Simms (pi)(030) | My Inbox | Logoff

Home Courses Agreements COI Facilities Grants IACUC IRB Safety

IACUC > Embolization Research Team Components

Active

Embolization Research Team

Principal Investigator: Rebecca Simms (pi)(030)
Phone: 716-645-5000
E-mail: ovpr.clicktesting@buffalo.edu

My Current Actions

- Edit Research Team
- Create Protocol
- Create Procedure
- Create Substance

My Inbox

- Help Center
- Submissions
- Concerns
- Reports
- Library

Submissions Procedures Substances History Research Team Contacts Archived Procedures Archived Substances Training

Filter by ID [] Go Clear Advanced

ID	Name	Date Modified	State	Submission Type
PROTO201600042	Sample IACUC Protocol	1/6/2017 12:45 PM	Post-Review	New Protocol Application
PROTO201700010	TD - Test Protocol - Ancillary Review	1/6/2017 12:17 PM	Pre-Review	New Protocol Application

2 items page 1 of 1 25 / page

From the Research Team workspace, you will see:

1. All submissions to the IACUC module
2. State in the review process
3. Team PI
4. Actions that can be performed by the research team

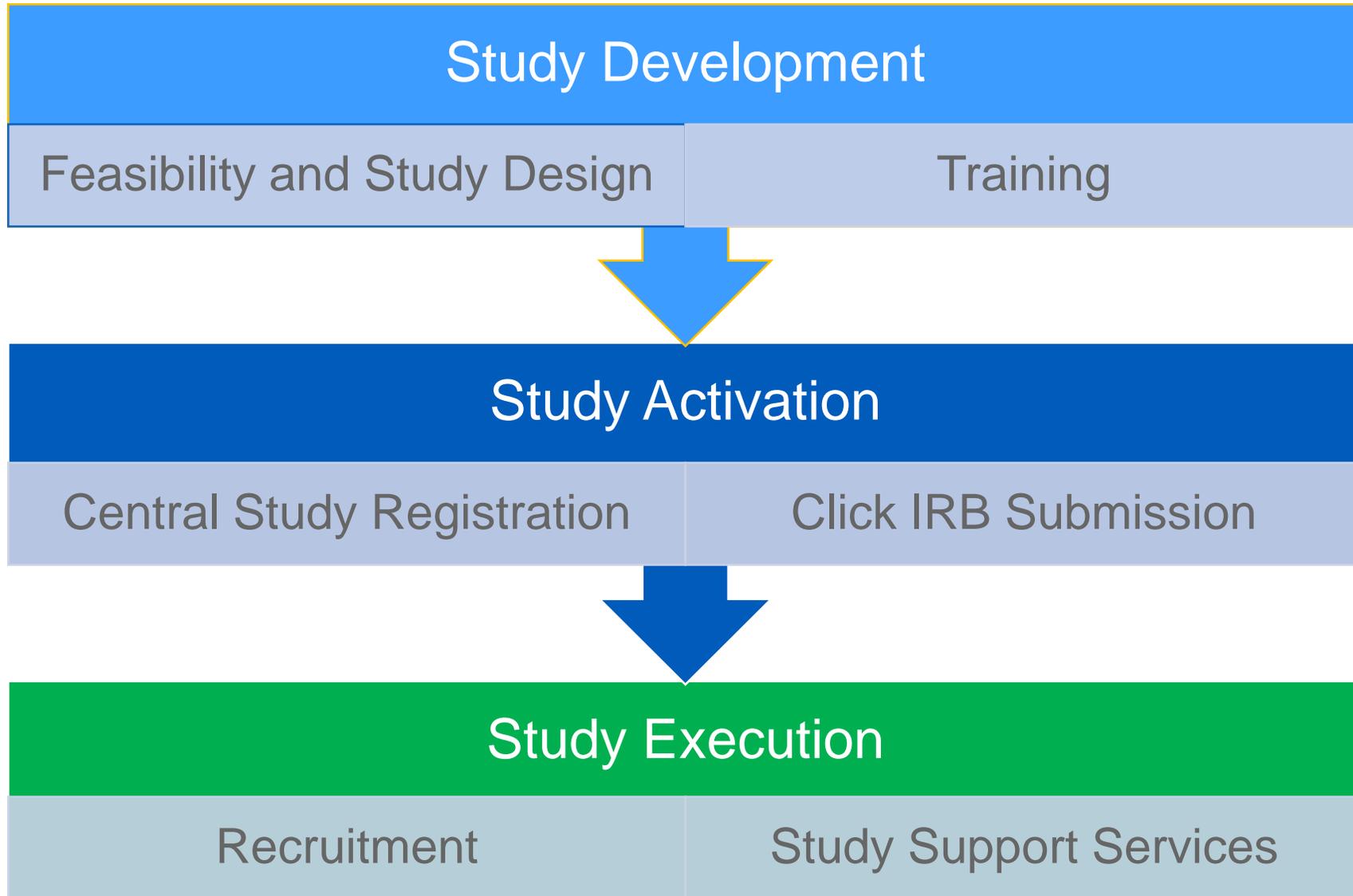
IRB

- Provides a streamlined way for researchers to create and submit protocols for studies involving human subjects.
- Initiates and provides support for New Studies, Modifications/Continuing Reviews, and Reportable New Information
- The Institutional Review Board (IRB) approves, modifies, or rejects proposed research based on its perceived risks and benefits to prospective subjects.

Benefits:

- Ensures compliance standards
- Reduces approval turnaround times





Central Study Registration CSR:

This is the place to enter your study from any of the Health Sciences Schools, or if your study is deemed a clinical trial.

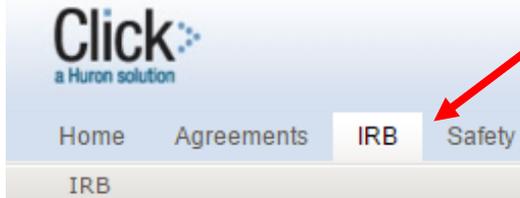
From the information you provide in CSR, the Clinical Research Office (CRO) will create your IRB submission in CLICK IRB.

It is important to note that CRO will never SUBMIT your study for you, they create it and then turn it over to you to add any outstanding documents that the IRB will need to review (data collection forms, surveys, consent forms and the like...) and submit the study for review when ready.

For help with CSR: contact Kim Brunton
716-888-4840, kbrunton@buffalo.edu

From **IRB Tab**, you will see:

1. Active, Archived, or All submissions (regardless of status) to the IRB module
2. Reporting features
3. State of the review process
4. Shortcuts to available actions, and resource documents



IRB

Create New Study
Report New Information

Submissions
Meetings
Reports
Library
Help Center

In-Review				
Active				
Archived				
New Information Reports				
All Submissions				
Filter by ID				
Go Clear Advanced				
ID	Name	Date Modified	State	
STUDY00000102	MLW Test Study	3/30/2016 3:00 AM	Pre-Review	
STUDY00000113	MLW Manual 3.28.16	3/29/2016 1:18 PM	Pre-Submission	
STUDY00000108			Pre-Submission	
STUDY00000104			Pre-Review	
STUDY00000086			Pre-Submission	
STUDY00000085	;kfd;kg;glk;	2/2/2016 2:06 PM	Pre-Review	

6 items

page 1 of 1

To open a study that you are associated with, click on the hyperlinked ID. This will take you to the study workspace.

Study Workspace



Pre-Review

Entered IRB: 6/9/2015 3:01 AM
Initial approval:
Effective:
Approval end:
Modified: 6/9/2015 3:05 AM

STUDY00000005 : Study on Improving a condition

Principal investigator: Rebecca Simms (pi)(demo) ← 1
Submission type: Initial Study
Primary contact: Rebecca Simms (pi)(demo)
IRB coordinator: Orlando Max (irbc)(demo)

IRB office: IRB 1

Pre-Submission → Pre-Review → IRB Review → Post-Review → Review Complete ← 2

Clarification Requested (between Pre-Review and IRB Review)
Clarification Requested (between IRB Review and Post-Review)
Modifications Required (between Post-Review and Review Complete)

My Current Actions

- View Study
- Printer Version
- View Differences
- Add Related Grant
- Withdraw
- Discard

History Funding Project Contacts Documents Reviews Snapshots ← 4

Filter by Activity Go Clear Advanced

Activity	Author	Activity Date
Response Submitted	Simms (pi)(demo), Rebecca	6/9/2015 3:05 AM
Clarification Requested	Max (irbc)(demo), Orlando	6/9/2015 3:02 AM
IRB Coordinator Assigned	Max (irbc)(demo), Orlando	6/9/2015 3:02 AM

Assigned to Orlando Max (irbc)(demo)

1. Study details
2. The state in the review process
3. Actions you can take
4. Tabs with information about the study and the review process

Protocol Form and Supporting Documents

You will need a protocol form to upload into the system, along with any other supporting documents you want to upload.

If you don't have documents readily available on your computer:

- Navigate to <http://www.buffalo.edu/research>
- Click on *Office of Research Compliance (ORC)*
- Click on *Institutional Review Boards (IRB) Toolkit*
- Click on *Templates*
- Download:
 - [HRP-503-Template Protocol](#)

Final Page

You Are Here: Diabetes and Cinnamon

Editing: STUDY00005492 [Go to forms menu](#) [Print](#) [Help](#)

Final Page

You have reached the end of the IRB submission forms. Please read the next steps carefully in order to submit your submission for IRB review:

1. Click the "**Finish**" button on this page to exit the submission forms and be redirected to the workspace.
2. **Important!** When you are ready to submit the submission for IRB review, you will then need to click the "Submit" activity from the left-hand navigation of the workspace page.
3. Read and attest to the content of the pop-up window and click "Ok" which will execute the "Submit" activity.
4. Provided that all required information has been completed, the status of the submission will change and the submitted activity will be tracked in the history.

[Exit](#) [Save](#) [Finish](#)

1. On the **Final Page**, click the **Finish** button to go to the **Study Workspace**.
2. Clicking **Finish** **DOES NOT** submit your protocol for review. You must use the **Submit** option in the **Study Workspace** to submit your protocol for review.
3. In order to send the submission for review, the **PI** must click **Submit**, read the statement and then click **OK** to submit the study for review

My Current Actions

[Edit Study](#)

[Printer Version](#)

[View Differences](#)

[Submit](#)

Roles during PRE-Submission

1. The research team will complete the SmartForm pages
2. The PI will then submit the study for review

Create New Study
Report New Information

Submissions
Meetings
Reports
Library
Help Center

In-Review	Active	Archived	New Infor
Filter by ?	ID		
ID			Na
STUDY00000102			MLV
STUDY00000113			MLV
STUDY00000108			MLV
STUDY00000104			MLV
STUDY00000086			NE
STUDY00000085			;kf
6 items			

My Current Actions

Edit Study
Printer Version
View Differences
Submit



There **Click Portal** and **CITI** will automatically add course information for study team members.

In order to ensure that your protocol is not delayed, you should verify that all study personnel have completed the appropriate **CITI Training**.

A screenshot of the Click Portal interface. The top left shows the "Click a Huron solution" logo. Below it is a breadcrumb "You Are Here: [oinj]". A navigation bar contains a "<< Back" button and a "Jump To: CITI Training" dropdown menu. The main content area is titled "CITI Training" and is divided into two sections. The first section, "1. PI Completed CITI Coursework:", lists a user "THOMAS WENDT" with a table of course details. The second section, "2. Study Team Members Completed CITI Coursework:", shows "There are no items to display" under the heading "Training Details". A second navigation bar at the bottom of the content area is identical to the one above.

Curriculum	Group	Stage	Expire
View CITI Conflicts of Interest	Conflicts of Interest	Stage 1	8/27/2016

To log in to Citi trainings, navigate to <http://www.citiprogram.org>, enter your **UBIT name** and **Password**.

Safety Module

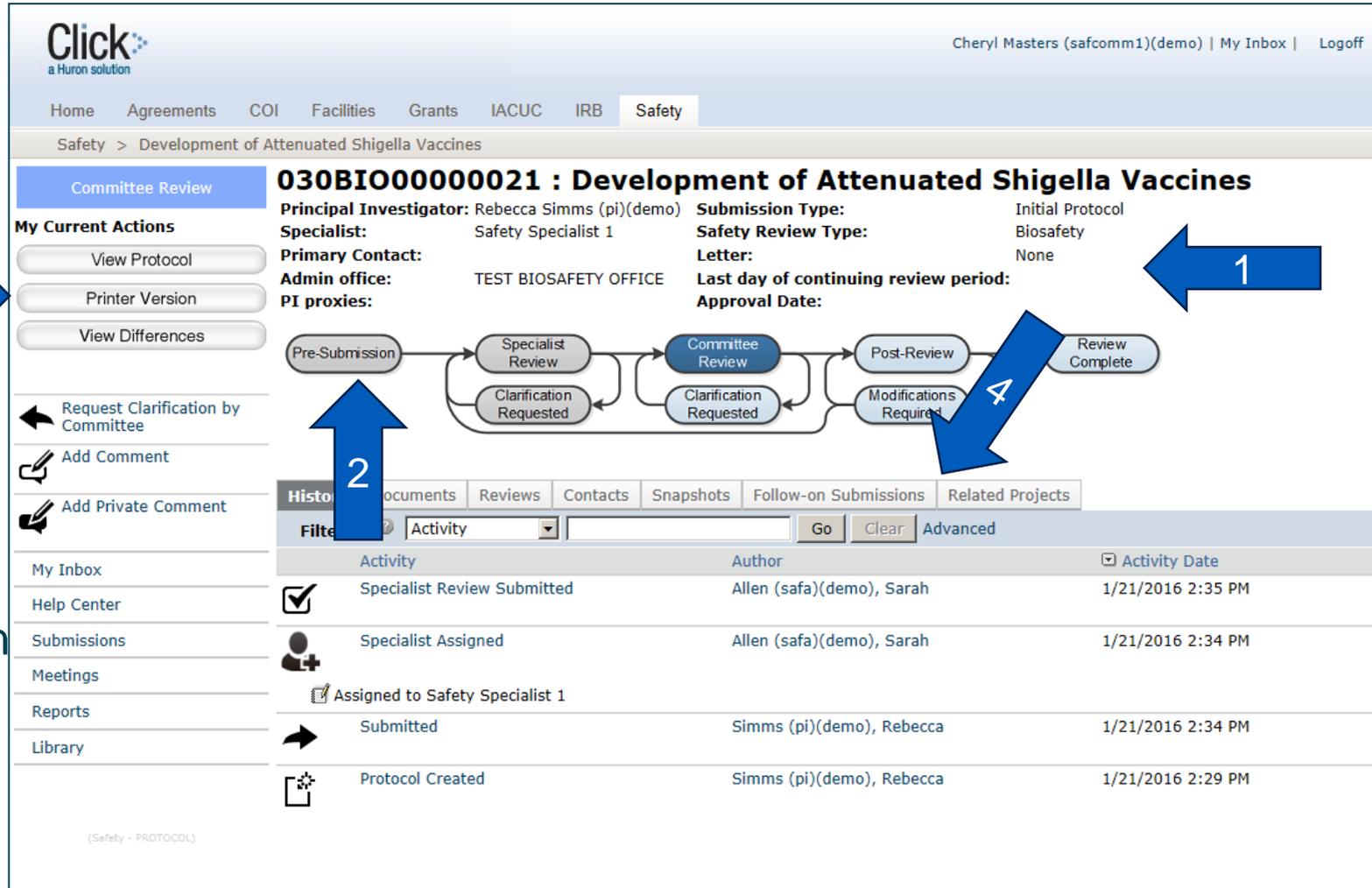
- Provides way for researchers to identify any hazardous materials that will be part of an experimental protocol:
 - Biosafety Hazards
 - Radiation
 - Chemicals
 - Stem Cells
- The Environment, Health and Safety (EHS) department anticipates, recognizes, evaluates, and controls all safety hazards at the University while striving to protect human health and the environment.

Benefits:

- Ensures adherence to NIH and other federal, state, and local regulations
- Allows the tracking of Safety protocols in parallel with IRB and IACUC protocols
- Contains full review, committee, and meeting management functionality

Clicking on the protocol from the **Safety Tab** you show you

- 1) Protocol details and information
- 2) The state in the review process
- 3) Actions you can take in the protocol's state
- 4) Tabs with history of the submission and relevant documents



Click
 a Huron solution

Cheryl Masters (safcomm1)(demo) | My Inbox | Logout

Home | Agreements | COI | Facilities | Grants | IACUC | IRB | **Safety**

Safety > Development of Attenuated Shigella Vaccines

Committee Review

030BIO0000021 : Development of Attenuated Shigella Vaccines

Principal Investigator: Rebecca Simms (pi)(demo) **Submission Type:** Initial Protocol
Specialist: Safety Specialist 1 **Safety Review Type:** Biosafety
Primary Contact: **Letter:** None
Admin office: TEST BIOSAFETY OFFICE **Last day of continuing review period:**
PI proxies: **Approval Date:**

My Current Actions
 View Protocol
 Printer Version
 View Differences

Request Clarification by Committee
 Add Comment
 Add Private Comment

My Inbox
 Help Center
 Submissions
 Meetings
 Reports
 Library

Pre-Submission → Specialist Review → Committee Review → Post-Review → Review Complete
 Clarification Requested (between Specialist Review and Committee Review)
 Clarification Requested (between Committee Review and Post-Review)
 Modifications Required (between Post-Review and Review Complete)

History | Documents | Reviews | Contacts | Snapshots | Follow-on Submissions | Related Projects

Filter: Activity [dropdown] [Go] [Clear] Advanced

Activity	Author	Activity Date
Specialist Review Submitted	Allen (safa)(demo), Sarah	1/21/2016 2:35 PM
Specialist Assigned	Allen (safa)(demo), Sarah	1/21/2016 2:34 PM
Assigned to Safety Specialist 1		
Submitted	Simms (pi)(demo), Rebecca	1/21/2016 2:34 PM
Protocol Created	Simms (pi)(demo), Rebecca	1/21/2016 2:29 PM

(Safety - PROTOCOL)

1. Navigate to <http://www.buffalo.edu/research>
2. Locate the QUICK LINKS section of the page:



A screenshot of a web browser displaying the University at Buffalo research website. The browser's address bar shows "buffalo.edu/research.html". The page features a header with a news article titled "UB launches artificial intelligence institute". Below the header, there are several sections: "HOW UB SOLVES PROBLEMS" with a photo of Christina Orsi and her article "Christina Orsi: Innovation Hub to spin inventions into startups"; "NEED TO KNOW" with three news items; "QUICK LINKS" which is circled in red and contains a list of links including "Participate in Research", "UB Rates and Facts for Researchers", "Limited Submission Opportunities", "Forms Catalog", "CLICK Portal Login" (highlighted in yellow), "OnCore Login", "Training Workshops", and "RF SUNY Funding Resources"; and "HIGHLIGHTED EVENT" with a "Covid-19: Research Guidance" button. The browser's taskbar at the bottom shows various application icons and the system tray with the date and time "3:46 PM 2/16/2023".

3. Click on the [Click Portal Login](#) link
4. Enter your UBITName and Password and click the Log In button.

Questions?

- For technical questions regarding Click:
 - Tracie Groves, traciegr@buffalo.edu
- For assistance with UBITNames and Passwords:
 - Electronic Research Administration, support@research.buffalo.edu

