1. Verify **Core Committee Staff** is displayed on the home workspace.
2. Note that the **Inbox** is active.
3. Click the **Name** of the Registration to be reviewed.

4. The following actions can be performed from the **IBC Staff Review** screen:
   - **View IBC Registration** – Opens a read-only view of the IBC Registration and allows for the insertion of notes.
   - **Printer Friendly Version** – Opens a printer friendly version of the Registration.
   - **View Differences** – Shows all changes to the Registration between versions. (See the View Differences section at the end of this document for additional information.) If no previous versions are found, no changes will be displayed.

5. Multiple functions can be performed from the **My Activities** area:
   - **Edit Contingencies** – Used to add, edit, or delete contingencies for the registration. Contingencies are published to the PI by using the Approve with Contingencies activity.
   - **Assign for Review** – Form used to add the registration to the agenda for committee review.
   - **Summarize Reviews** – Returns the Registration to the staff for processing. (No notification is sent to the PI.)
   - **Request Changes** – Area where comments and documents can be added and be posted to the Study Workspace where they can be viewed.
and/or downloaded by the PI and Registration editors, all Committee Members and IBC Office Staff.

- **For Reviewers and IBC Staff Only** – This activity posts comments and documents to the Study Workspace. Comments and documents are visible only to IBC Reviewers and Staff and cannot be deleted.

- **Staff Note** – Used to post notes that are only visible to the IBC Office staff.

- **Post Correspondence** – Used to add comments and documents to the Study Workspace. They are visible to anyone with access to the study, including Study Team Members, Committee Staff, Committee Members, Technical Staff and Regulatory parties, and cannot be deleted.

6. Click **View IBC Registration**.

### Adding Reviewer Notes

1. The IBC rDNA Registration Form displays.
2. Click **Add** to open the Reviewer Note function.
3. Choose the **Note Type** from the pull down menu. The following **Note Types** can be created:
   - **IBC Staff Note** – Used by the Staff reviewer to create notes. IBC Staff notes are only visible to the Staff and can be deleted.
   - **Draft Review Note** – Creates a note for the Reviewer and is visible when published. Draft Review Notes cannot be deleted once the Registration is submitted to Reviewers. Once submitted, it becomes a Reviewer Note.
   - **Draft Change** – Creates a note for the PI and is only published to the PI. Draft Change Notes cannot be deleted once the Registration is sent back to the PI. Once submitted, it becomes a Request for Change.
4. Enter the Note.
5. Click **OK**.
Deleting Reviewer Notes

6. Click Continue to go to the next page of the registration.

7. Click Delete to open the Delete Reviewer Notes window.

8. Choose the Filter Type from the pull down menu. The following Filter Types can be used:
   - **Type** – Sorts by the type of note, IBC Staff, Draft Reviewer and Draft Change.
   - **Author Last** – Sorts by the authors’ last name.
   - **Author First** – Sorts by the authors’ first name.

9. Select the checkbox by the Note to be deleted or click Select All to select all notes.

   **Note:** The note can be viewed by clicking the note title. Click the Jump To link to go to the section of the Registration that pertains to the note.

10. Click Delete.

11. Click Cancel to close the Delete Reviewer Notes window.

12. Click Continue to go to the next page of the Registration.
Reviewer Note Functions

13. The **Previous** and **Next** buttons can be used to navigate to the previous or next Registration page with notes.

14. **Filter by** sorts the notes by the note Type, Reviewer last name or Reviewer First name.

15. Click **Continue** to go to the next page of the Registration.

Continue Review

16. Continue reviewing the Registration

17. **Add** and **Delete** Reviewer Notes, as needed.

18. Click **Continue** to advance to the next page of the application.

**Note:** Continue the above steps to review the remaining pages of the Registration.
19. After completing the Registration review, click on **Finish**.

20. Verify **IBC Staff Review** is displayed on the home workspace.

21. Click **Assign for Review** to assign the Registration to Committee Member Review.
22. Select the Agenda Item Type.
23. Enter **Staff Notes**, if applicable.
24. Add **Documents**, if applicable.
25. **Select Meeting** date by choosing the appropriate meeting option.
26. Click **Add** to add Reviewers to the Registration.

27. Type the first three letters of the last name of the Reviewer and click **Go**.
28. Select the Reviewer.
29. Click **OK**.

**Note:** Multiple reviewers can be added by selecting the checkbox next to their name and then clicking OK.
30. Enter **Notes to Reviewers**, if applicable.

31. Click **OK**.

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32. The Registration is now assigned for review.

**Note:** After the Committee Member reviews the Registration, you will use the Summarize Reviews activity to route the Registration back to your workspace.
Post Committee Member Approval

1. Log into your home workspace and verify Core Committee Staff is displayed.

2. Click IBC.

3. The All Registrations tab is displayed.

4. Click the name of the Registration.
5. Verify the current role is **IBC Committee Review**.

6. Click the **Reviews** tab.

7. Verify that at least two Reviewer’s most recent reviews agree on a decision.

8. Click **Summarize Reviews**.

9. Enter the Registration **Approval Date**.

10. Enter the **Animal Containment Level**, if applicable.

11. Click **OK**.
Validate Committee Decision

1. Verify the current state is **Validate Committee Decision**.

2. Multiple functions can be performed from the **My Activities** area:

   - **Edit Contingencies** – Used to add, edit or delete contingencies for the Registration. Contingencies are published to the PI by using the Approve with Contingencies activity.

   - **Edit Approval Period** – Used to change the approval and expiration dates of the Registration.

   - **Prepare Letter** – Used to prepare the Registration outcome letter. This letter is saved for future use and completing the activity does not send the letter to the PI.

   - **Action Deferred Pending Committee** – Sends the study back to the IBC Staff Reviewer.

   - **Approve** – Opens the Approval letter form for editing. Completing the Approve activity sends the Approval letter to the PI.

   - **Approve with Contingencies** – Opens the Approve with Contingencies letter form for editing. Completing the Approve with Contingencies activity sends the Approve with Contingencies letter to the PI and publishes all contingencies.

   - **Disapprove** – Opens the Disapproval letter form for editing. Completing the Disapprove activity sends the Disapproval letter to the PI.

   - **Disapprove (Final)** – Opens the final Disapproval letter form for editing. Completing the Disapprove (Final) activity sends the Final Disapproval
• **Action Deferred Pending PI** – Sends the Registration back to the PI and Registration editors listing all contingencies required for approval.

• **For Reviewers and IBC Staff Only** – This activity posts comments and documents to the Study Workspace. Comments and documents are visible only to IBC Reviewers and Staff and cannot be deleted.

• **Staff Note** – Area to add notes that are only viewable by IBC Staff.

• **Post Correspondence** – This activity posts comments and documents to the Study Workspace. They are visible to anyone with access to the study, including the PI, Registration Editors, Committee Staff, Committee Members, Technical Staff, and Regulatory Parties and cannot be deleted.

3. If approving the Registration, click **Approve**.

4. Review **Exempt** information, animal or trangenics, viral vectors, and animal Biosafety level, and edit the letter as necessary.

5. Delete the summary information at the top of the letter.

**Note:** Any information displayed in the letter editor when the activity is completed is sent as part of the Approval letter and cannot be edited at a later time. If multiple changes are needed to the letter prior to sending, use the **Prepare Letter** activity.

6. Click **OK**.
7. Verify the current state is **Approved**.

8. The **Dates** area displays the initial approval, last approval and expiration information for the Registration.

9. The **Correspondence** tab displays all activities on the Registration, including the final Approve status.

   **Note:** The Registration is complete and approved for study by the PI.

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**View Differences**

1. Verify the current state is **Approved**.

2. To view the differences between the original Registration and the amended Registration, click **View Differences**.
View Differences

Differences are displayed between the current version and previous versions.

4. Use the **Show Changes** drop-down menu to choose the previous version with which to compare the current version.

   **Note:** Changes are highlighted on the page in red; deleted items are crossed out; additions are highlighted in yellow.

5. Use the **Changed Steps** drop-down menu to jump to sections of the Registration that have changes.

6. Use the **Forward** and **Back** buttons to go to the next and previous pages with changes in the Registration.

7. Click **Close** after reviewing the differences in the Registration to go back to the Registration workspace.