Create an Action Item

Overview

Action Items are created within animal use forms, amendments and protocols to notify a person or group of a related task. If the Action Item requires an amendment, the Action Item and amendment need to be associated with each other.

When working with Action Items, there are activities specific to the assigner and the assignee, as well as activities that can be taken by both. When following the steps in this document, note the role(s) of the individual who can or must perform each activity.

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Creating an Action Item (Assigner)

Protocol Workspace

1. Click [Create Action Item] on the approved Protocol Workspace.

Note: This process works similarly if done from the Amendment Workspace or the Animal Use Workspace.
2. Select the appropriate Action Item from the Action Item Type menu. Available options include:
- Add Authorized Animals
- Amendment Needed
- Funding Amendment Needed
- Funding Amendment Needed per Annual Review
- Funding Amendment Needed per Post Approval
- General Action Item for Lab
- General Action Item for UCUCA
- General Action Item for ULAM
- General Action Item needed per Post Approval
- Personnel Amendment Needed
- Personnel Amendment needed per Annual Review
- Personnel Amendment needed per Post Approval
- Scientific Amendment Needed
- Scientific Amendment needed per Annual Review
- Scientific Amendment Needed per Post Approval
- Submit a New Purchase Request
- Submit a Non Trad. Aqu. Form (D Form)
- Submit a U of M Transfer Request (C Form)

This Action Item should not be used to notify someone that you have started a transfer form and need them to fill in their portion. In this case, they will receive an email when you submit your form so the Action Item is unnecessary.

Note: This list may change over time.

3. Describe the Action Item in the field provided. This description becomes the title of the Action Item and will be included in the notification email.

4. Indicate the deadline for completing the Action Item in the field provided. This is also included in the email notification.
5. Select the person(s) to whom the Action Item is assigned from the **Assigned To** drop-down list.

**Note:** The assignee can be an individual, a group or an office. The Action Item will display in the user(s)’s Action Item tab on the Home Workspace. Anyone associated with the Action Item can add comments to it.

6. If **Individual Person** was selected in step 5, click [Select...] in the **Select Assignee** field and locate the individual.

7. Select the person, group or office assigning the Action Item from the **Assigned by** field.

**Notes:**
- The Assigner does not have to be the person creating the Action Item. For example, an administrative assistant may create the Action Item in the system, but it is being assigned by a ULAM office.
- The Assigner has the ability to close and reopen the Action Item.

8. Click **Finish** to save the Action Item.

The system will send an email to the Assignee(s) to notify them of the Action Item and outlines how to complete the Action Item in eResearch Animal Management (eRAM).
Associating an Amendment (Assigner or Assignee)

Before associating an Action Item with an amendment, the amendment needs to be created. See Create Amendments – Step-by-Step Procedure. Note that this applies only to some of the Action Item types.

Action Item Workspace

1. Click Manage Amendment Association from the Activities menu in the Action Item Workspace.

Manage Amendment Association page

2. Click Add.
Select Amendment page

3. Check the box next to all applicable amendments.

Notes:
- Use the Filter By options to narrow the list of amendments.

Manage Amendment Association page

4. Click OK.

5. Click OK.
Managing an Assignment (Assigner)
The person(s) assigned to the Action Item can be changed using the Manage Assignment function.

Action Item Workspace

1. Click **Manage Assignment** from the Activities menu in the Action Item Workspace.

Manage Assignment page

2. Select the person(s) to whom the Action Item is being reassigned from the **Assign to** drop-down list.

3. If **Individual Person** is selected in step 2, click **Select...** in the **Assignee name** field and locate the individual.

4. Enter any comments about the assignment change in the **Comments** field.

5. Click the appropriate **Yes** or **No** radio buttons next to the individuals to whom you want to email comments in the **Email comments to** field.

6. Click **OK**.
Adding a Comment (Assigner or Assignee)

Comments can be added to Action Items by anyone associated with the Action Item.

Action Item Workspace

1. Click Add Comment from the Activities menu in the Action Item Workspace.

Add Comments page

2. Enter Comments about the Action Item in the field provided.

3. Click the appropriate Yes or No radio buttons next to the individuals to whom you want to email comments in the Email comments to field.

4. Click OK.
Managing Assignee Notes (Assignee)
The Assignee(s) can add notes regarding the Action Item.

Action Item Workspace

1. Click **Manage Assignee Notes** from the Activities menu in the Action Item Workspace.

Manage Assignee Notes page

2. Enter **Assignee Notes** in the field provided.

3. Click **OK**.
Adding Documents (Assigner or Assignee)
Documents related to the Action Item can be uploaded and attached to that Action Item.

Action Item Workspace

1. Click Add Documents from the Activities menu in the Action Item Workspace.

Add Documents page

2. Click Add.

Submit a Document page

3. (Optional) Enter a Title for the document in the field provided. If no title is entered, the document file name is automatically used as the title.
4. Click Browse, then navigate to and select the document.
5. Click OK.

Note: If more than one document needs to be attached to the application, click OK and Add Another and repeat steps 3-4.
Add Documents page

6. Click OK

Completing the Action Item (Assignee)

Action Item Workspace

1. If the Action Item is complete, click Complete Action Item from the Activities menu in the Action Item Workspace.

Complete Action Item page

2. Enter any Comments about the Action Item in the field provided.
3. Click the appropriate Yes or No radio buttons next to the individuals to whom you want to email comments in the Email comments to field.
4. Click OK
Closing or Reopening the Action Item (Assigner)
When the Action Item is complete or no longer needed, it needs to be closed by the assigner. If the Action Item is not completed based on the assigner’s review, it can be sent back to the assignee(s).

Closing the Action Item

Action Item Workspace

1. Click Close Action Item from the Activities menu in the Action Item Workspace.

Close Action Item page

2. Enter a Reason for closing the Action Item in the field provided.

3. Click the appropriate Yes or No radio buttons next to the individuals to whom you want to email the close notification and reason in the Email reason to field.

4. Click OK.
Reopening the Action Item

**Action Item Workspace**

1. Click **Reopen Action Item** from the Activities menu in the Action Item Workspace.

**Reopen Action Item page**

2. Enter an explanation for reopening the Action Item in the **Reason** field.

3. Click the appropriate **Yes** or **No** radio buttons next to the individuals to whom you want to email the reopen notification and reason in the **Email reason to** field.

4. Click **OK**.