RAPPORT

CPHS Reviewers Guide

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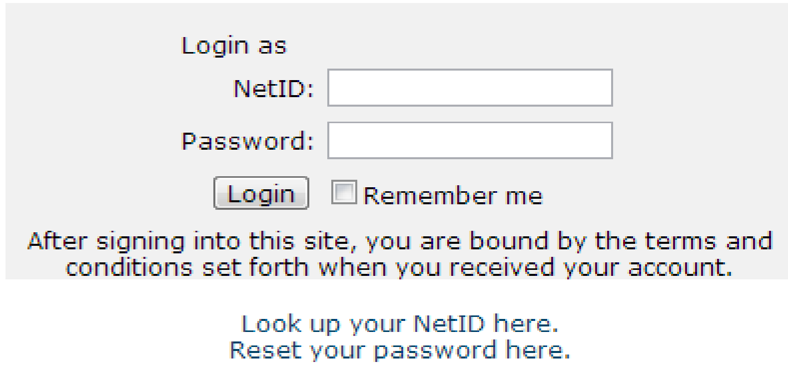
Logging In

RAPPORT is secure, which means only authorized individuals have access to it. When you log in to RAPPORT, you get a personalized view of the information and possible actions pertinent to you.

To log in:

1. If you do not see the form shown to the right, click the **Login** link located at the top right corner of your screen.
2. Type your NetID and Dartmouth password into the boxes.



Tips: Press the Tab key after typing your user name to move to the Password box.

If you do not know your NetID or password, look them up using the links below the login form or contact the CPHS office for assistance. (See Contacting Support on page 8.)

3. Click **Login** (or press Enter).

Locating Your To-Do List

CPHS studies that are assigned to you for review will appear in My Inbox with a link to the study. You will also receive an e-mail with a link to the study.

The list called My Inbox contains studies or other submissions that require you to take action. See the examples below to understand what you should and should not expect to appear in My Inbox.

Your Role	**In My Inbox**		**Not in My Inbox**
	State	**Explanation**	
CPHS committee member	Non-Committee Review	You have been designated as the reviewer for this exempt or expedited study. You must submit your final review before the CPHS decision can be communicated to the study team. If you request clarifications, the study comes back to you to finish the review after the clarifications are made.	Studies assigned to other reviewers
	Committee Review	You are the committee member assigned to review this study. If so, review the study details in advance. You can request clarifications. Record your notes and recommendations in RAPPORT before the meeting as described in Preparing Comments for a Meeting on page 6.	Studies for which you are not the reviewer.

Note: A continuing review, review of a modification, or RNI (reportable new information) submission can be handled similarly to review of a new study.

Note: You can view the list of all submissions to be reviewed for a committee meeting as described in Navigating the Meeting Workspace on page 4.

To access studies or other submissions assigned to you:

1. Click the **My Inbox** link in the top right navigation header.
2. Identify the reason the study appears in My Inbox by looking at the State column.

3. Open the study by clicking the link in the Name column. This opens the Study Workspace.

To view the details of the study, click **View Study** on the left. For details, see Viewing the Study Details on page 5.

Accessing the Agenda

As a committee member, you will get a meeting agenda listing the studies and other submissions to be reviewed in an upcoming meeting. You can get the agenda in two forms:

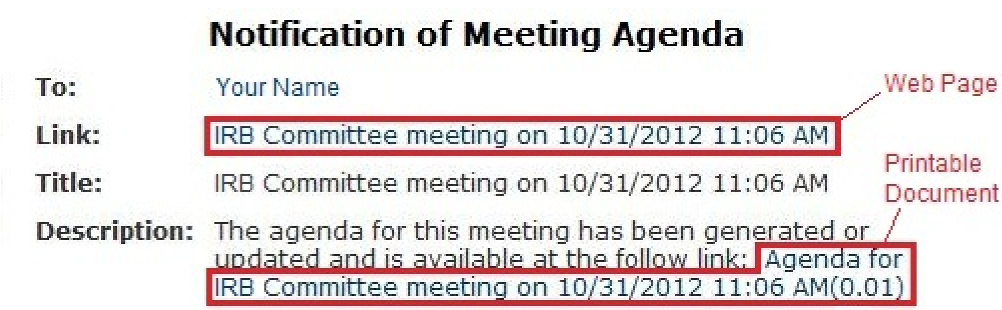
- As a web page with links to the studies
- As a printable document

The procedures below describe how to access both forms of the agenda in two alternative ways:

- From an agenda notification e-mail you receive
- By navigating to the agenda within RAPPORT, via the Meeting Workspace

To access the agenda from an e-mail you receive:

1. Open the e-mail informing you about a CPHS meeting agenda.
   The notification content will resemble this:



2. Click the appropriate link:
   - To access the Meeting Workspace web page containing links to the studies, click the link next to **Link** (shown above). The Meeting Workspace and its important links are shown below.
   - To open or save the printable document, click the link next to **Description** (shown above).

   Note: The most up-to-date agenda is in the web page format.
3. If prompted, log in to RAPPORT.

To navigate to the agenda within RAPPORT: follow the directions below for 'Navigating to the Meeting Workspace'

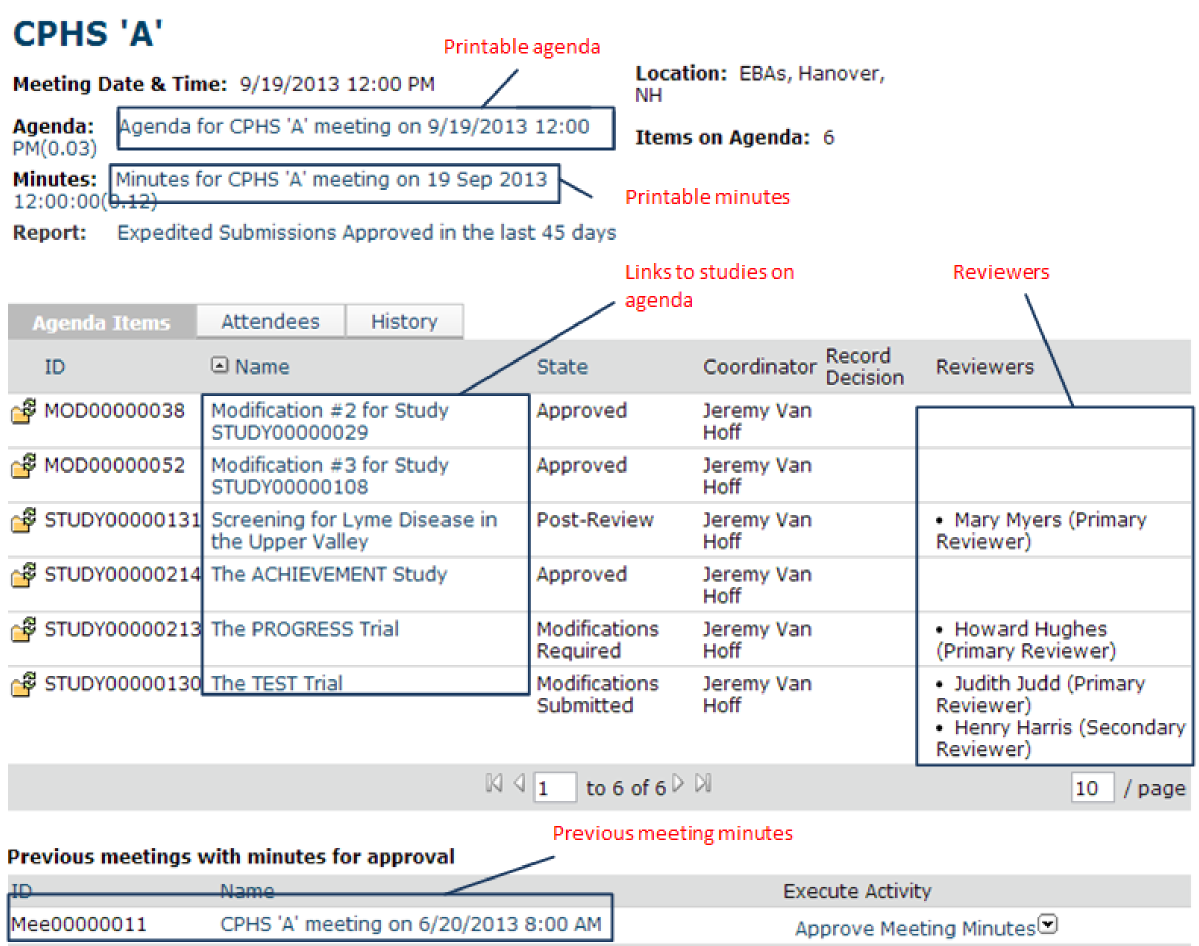
Navigating the Meeting Workspace

To access the Meeting Workspace:

1. Click **IRB** and then **IRB Meetings** in the upper left corner.

2. From the list of meetings shown in the center of the page, click the name of the meeting to view.

The Meeting Workspace displays the list of agenda items in the center of the page, resembling this:

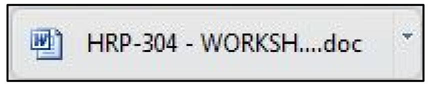


3. Click the appropriate link:

- To access a study directly from the agenda items list, click the link to the study (shown above).
- To open or save the printable agenda document, click the link in the page header next to **Agenda** (shown above). The agenda is in Microsoft Word format.
- To view minutes for approval, link the under **Previous meetings with minutes for approval**.

Tip: Documents open differently in different web browsers. If the document does not open promptly:

- o Click the Word icon if it is flashing at the bottom of your screen, and then click one of your open Word documents.
- o Check the bottom of the browser window to see if the document icon and name is shown there. If so, click the name to open it.



Viewing the Study Details

As a CPHS member, you will need to view all the information submitted as part of the study.

Note: If you are on the study team for a study, your permissions for that study will overrule your general permissions as a reviewer and limit what you can access.

To view the details of a study:

1. From My Inbox or the Meeting Workspace, click the name of the study to open it..
2. Click **View Study** on the left. You can also see all of the pages in the study workflow on a single screen by clicking **Printer Version**. The **Printer Version** view allows you to save the pages of the study workflow in a PDF for offline access. Any additional documents, such as the protocol or consent form, would need to be downloaded separately (see below).

Tips:

- For a continuing review or modification, click **View Modification / CR** instead.
- For a new information report, click **View RNI** instead.

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3. Use the Continue and Back buttons to view all of the forms.

To view the documents submitted as part of the study, you have these options:

- While viewing the details of the study, click the name of each document when you encounter it while scrolling down the page. Documents are listed in tables throughout the forms.
- While still in the Study Workspace (as in step 1 above), you can view a list of all the attached documents in one place by clicking the **Documents** tab.

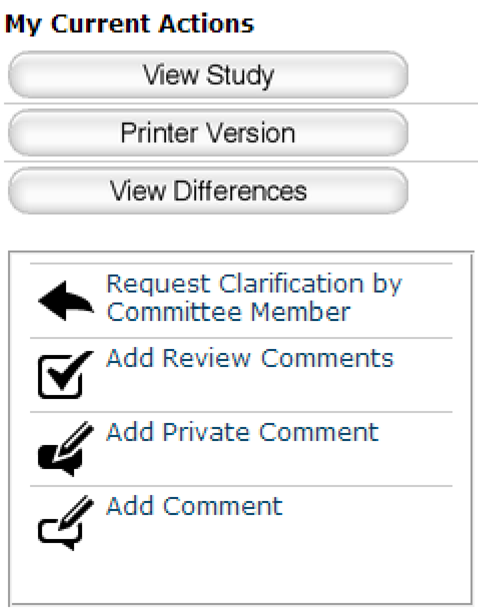
To view the information entered by the CPHS Office staff during pre-review, as well as any Ancillary reviews and previous Committee reviews:

1. Open the study as instructed in step 1 above.
2. Click the **Reviews** tab.

Tip: If the information entered for pre-review is inaccurate, contact the study's CPHS analyst or coordinator to request a change. They can change the pre-review information until the decision from designated or committee review is submitted.

Preparing Comments for a Meeting

While reviewing a study, you can record your review comments within RAPPORT. You can also upload checklists, notes and any other review-related documents. This lets committee members view each other's comments before and during the meeting. You can also continue to use the purple sheets and hand them to someone from the CPHS office after the meeting.



Once you access a study, you will see four actions you can take under the **View Differences** button.

1. **Request Clarification by Committee Member**. See Requesting Clarifications to a Study on page 6 for more details.

2. Add Review Comment. Type in notes, and upload any relevant reviewer checklists and other related documents, then click **OK**.

Before and during the committee meeting, you can go to the study's **Reviews** tab to view your comments and comments from other reviewers.

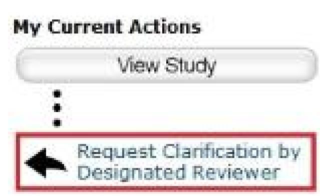
Note: All of your comments and the files you attach will be purged from RAPPORT when the approval letter is sent. **Your comments here are never visible to the study team members.**

3. **Add Private Comment.** This will put a permanent comment on the study visible only to the CPHS office and committee members who are not on the study team. You are also able to attach documents here.

4. **Add Comment**. This will add a permanent comment on the study visible to everyone on the study team, CPHS office, and committee members. You are also able to attach documents here. **CPHS discourages you from using this activity.**

Requesting Clarifications to a Study

In the Committee Review state, but before the committee meeting is in progress, you and other Committee reviewers can submit requests for clarification. Requesting clarifications allows the study team to respond to your comment, but please note that the study and its materials, cannot be *edited*—only commented on—by the study team until the full committee makes a determination.



To request clarifications to a study:

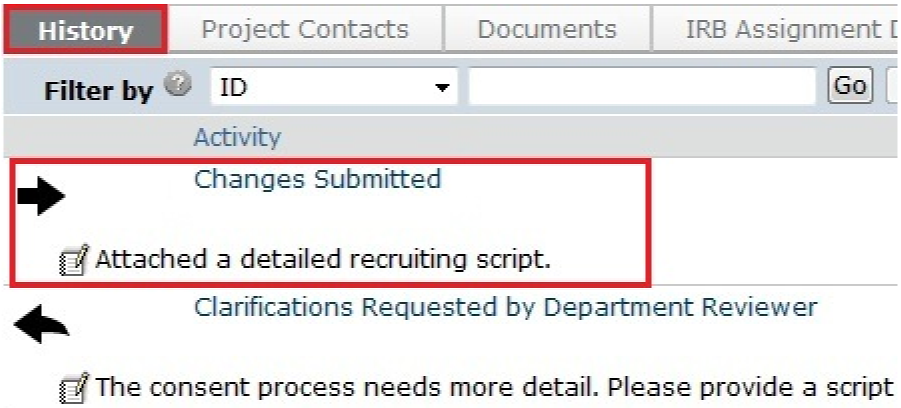
1. From My Inbox, click the name of the study to open it.
2. Click **Request Clarification...** on the left.
3. In the Request Clarification window, provide detailed

questions or requests for changes.

Note: You can also attach documents that explain your comments, show the study text, show screen captures of the problematic areas, or show suggestions for resolving the problems.

4. Click **OK** to send the request to the study team.

The study's history log will identify when clarifications have been made, as shown here.

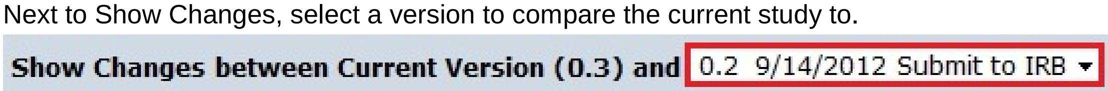


Viewing Changes to a Study

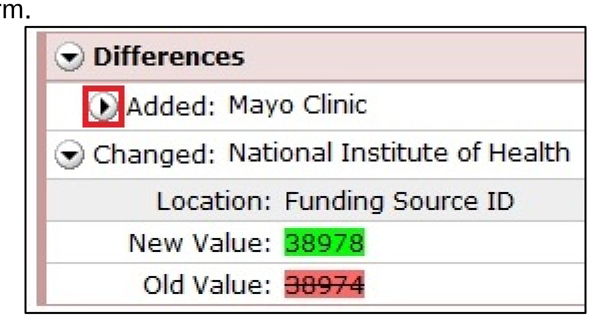
When a study changes based on reviewer requests, you may want to review just the specific changes. You can use the **View Differences** feature to identify all of the changes between two versions of a study.

To view the changes made to a study:

1. From My Inbox, click the name of the study to open it.
2. Click **View Differences** on the left.
3. Next to Show Changes, select a version to compare the current study to.



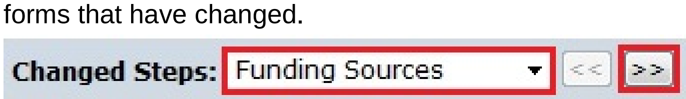
4. Look for red and green changes in the current form.



Click the arrow to show the details. The changes since the version you selected appear as follows:

- Additions to text since that version are shown with green highlighting.
- Deletions to text show in a light red box below the current text.
- Additions and deletions of selectable items show the changes (such as old values) in a light red box after the current values that appear normally.

5. Next to Changed Steps, click the >> arrow (or use the drop-down list) to view each of the other forms that have changed.



6. Exit the View Differences screen by clicking **Close** on the right.

You can also use the **Snapshots** tab to compare versions of the study.

Checklists and Worksheets

RAPPORT includes a series of comprehensive checklists and worksheets to assist in the review of a project. As we utilize the full functionality of the program, the CPHS office may encourage the use of these lists. At this time, CPHS members are welcome to:

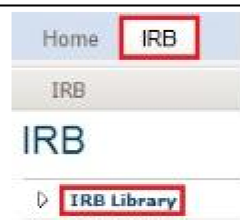
- Utilize the lists or;
- Continue to use the purple sheet or;
- Use the 'Add Review Comment' (second on list) activity within the study to manage reviews.
- Important: 'Add Comment' (last on list) comments and attached documents will be visible to the research team in the History of the study.

Note: See the **IRB Library** for a complete listing of checklists and worksheets.

Finding More Information

For information on designated reviews, see the Designated Reviewer Guide.

For information on conducting an 'Ancillary review', see the Ancillary Reviews Guide.

To find this...	...look for this...	...and click...
More information about a question or form.		Click the question mark icon next to the question or form title.
The full online help system, with search and table of contents. The online help contains additional procedures and information for all users.		Click the **Help** link in the Shortcuts area on the left.
Document templates, checklists, and IRB procedures.		Click **IRB** and then **IRB library** in the upper left corner.

Contacting Support

For additional answers to your questions, feel free to use the following resources:

Resource	How to access it
Training materials on the web site	http://www.dartmouth.edu/~cphs/tosubmit/rapporteducation.html
CPHS support staff	E-mail: CPHS.Tasks@dartmouth.edu Phone: 603-646-6482