



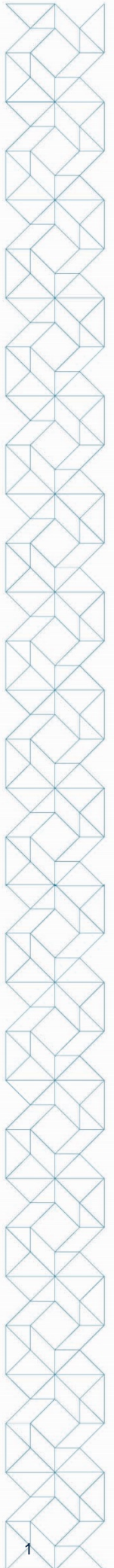
VICTORIAN INSTITUTE  
OF FORENSIC MEDICINE

# ETHICAL REVIEW MANAGER (ERM)

## Submitting an online research application: A Guide for Researchers.

*12 November 2018*

*Version 2*



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## Using the Ethical Review Manager (ERM) to submit a research application

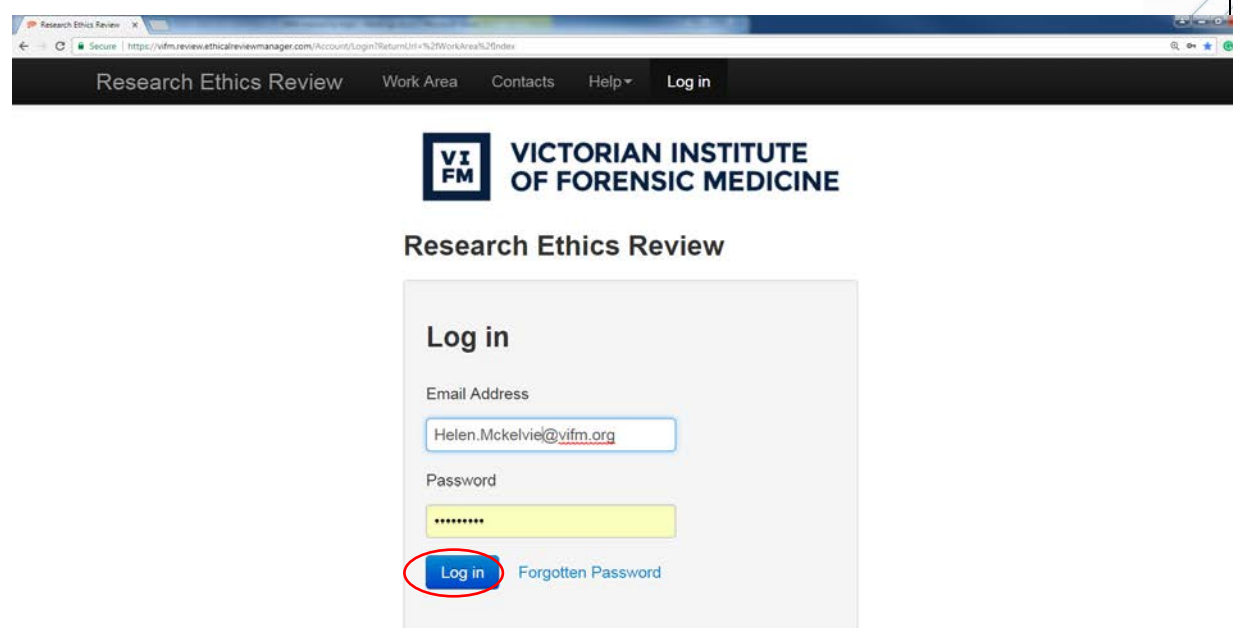
This is a step-by-step guide for the submission of a new research application to the Research Advisory Committee and the VIFM Ethics Committee.

### 1. Logging into the ERM system

To log into the ERM system, copy the following address into your browser and save it in your bookmark bar.

<https://vifm.forms.ethicalreviewmanager.com/Account/Login>

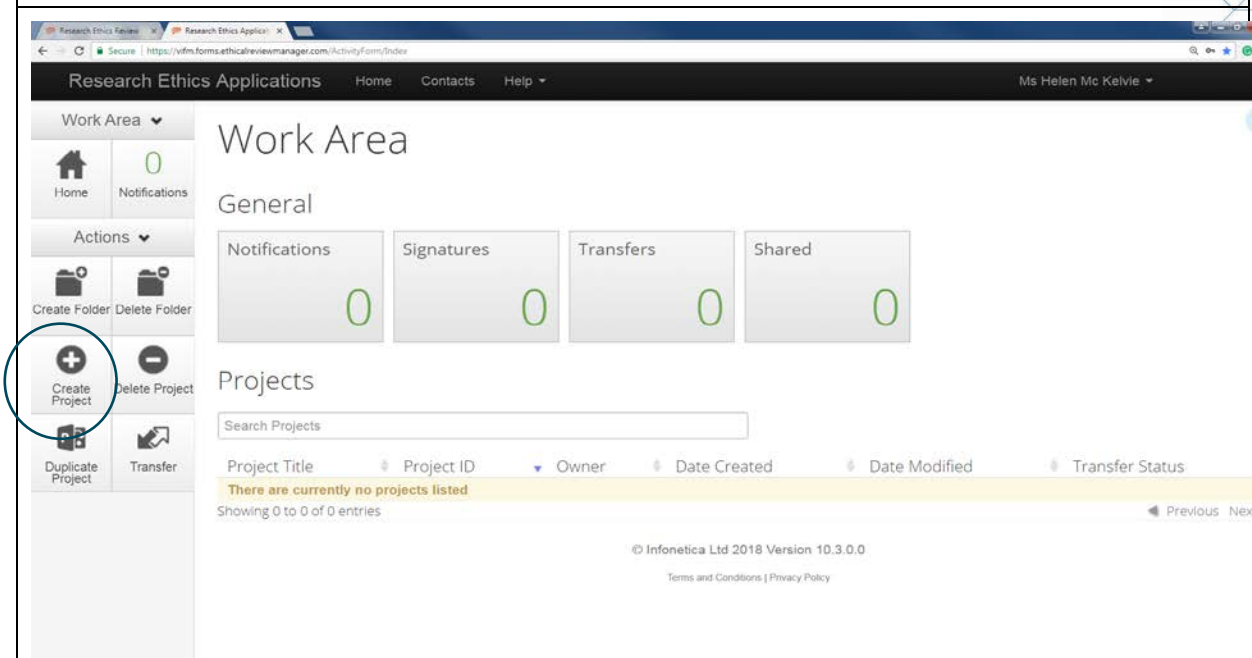
Insert your email address and password and click on “Log in”, or “Register” if you are logging into the system for the first time.



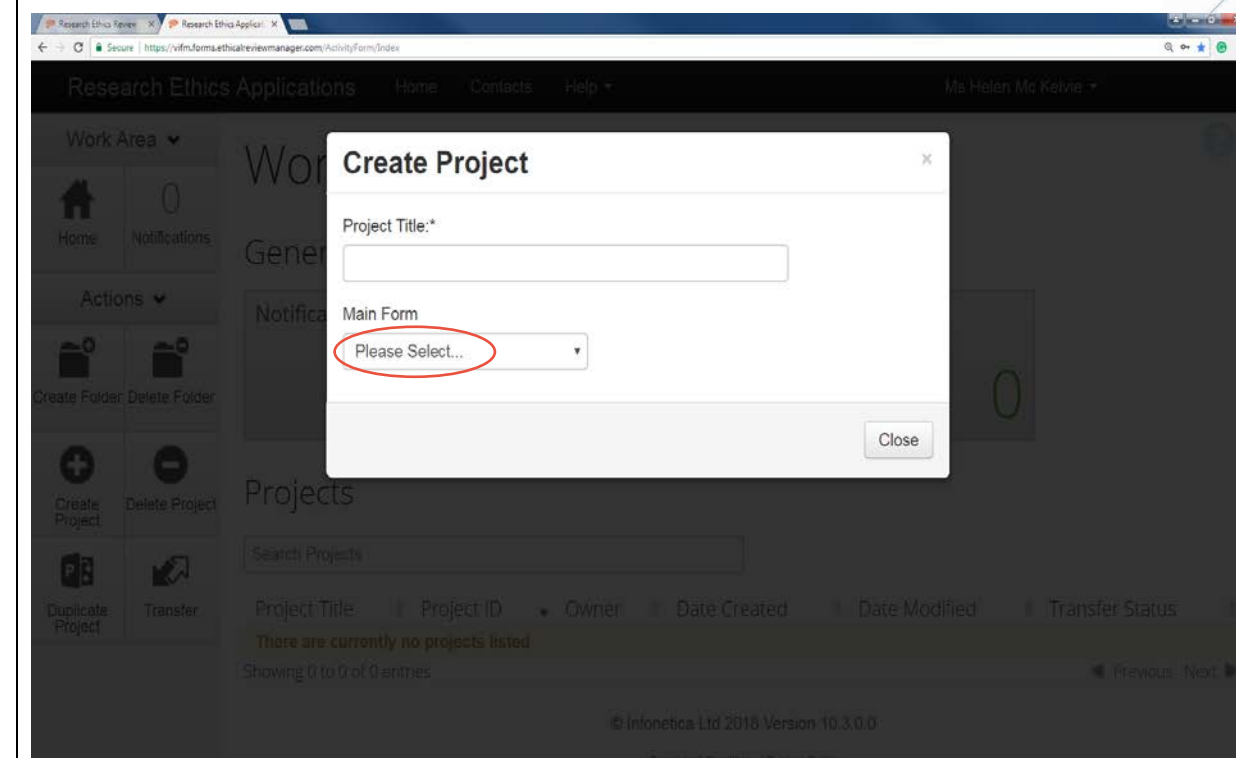
The screenshot shows a web browser window with the URL <https://vifm.review.ethicalreviewmanager.com/Account/Login?ReturnUrl=%2FWorkArea%2FIndex>. The page header includes "Research Ethics Review", "Work Area", "Contacts", "Help", and "Log in". The main content area features the VIFM logo and the text "Research Ethics Review". Below this is a "Log in" form with fields for "Email Address" (containing "Helen.Mckelvie@vifm.org") and "Password" (masked with asterisks). A red circle highlights the "Log in" button, and a link for "Forgotten Password" is visible next to it.

## 2. Creating a new application

When you have logged into the ERM, you will see your work area which looks like this screen. To start an application, click on the “Create Project” tile on the side navigation bar.



This will take you to the next screen. Click on “Please select” to reveal a drop-down menu of forms.

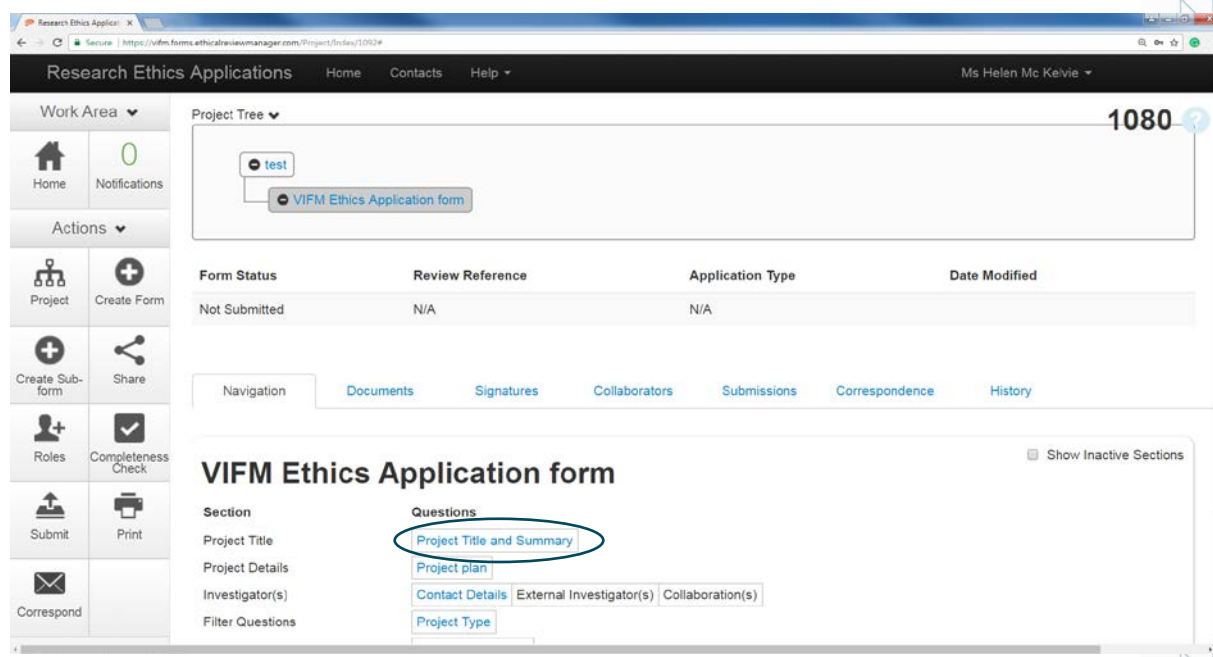


Select the “VIFM Ethics Application form” to create a new research application.

Enter the Project Title and click on “Create”.

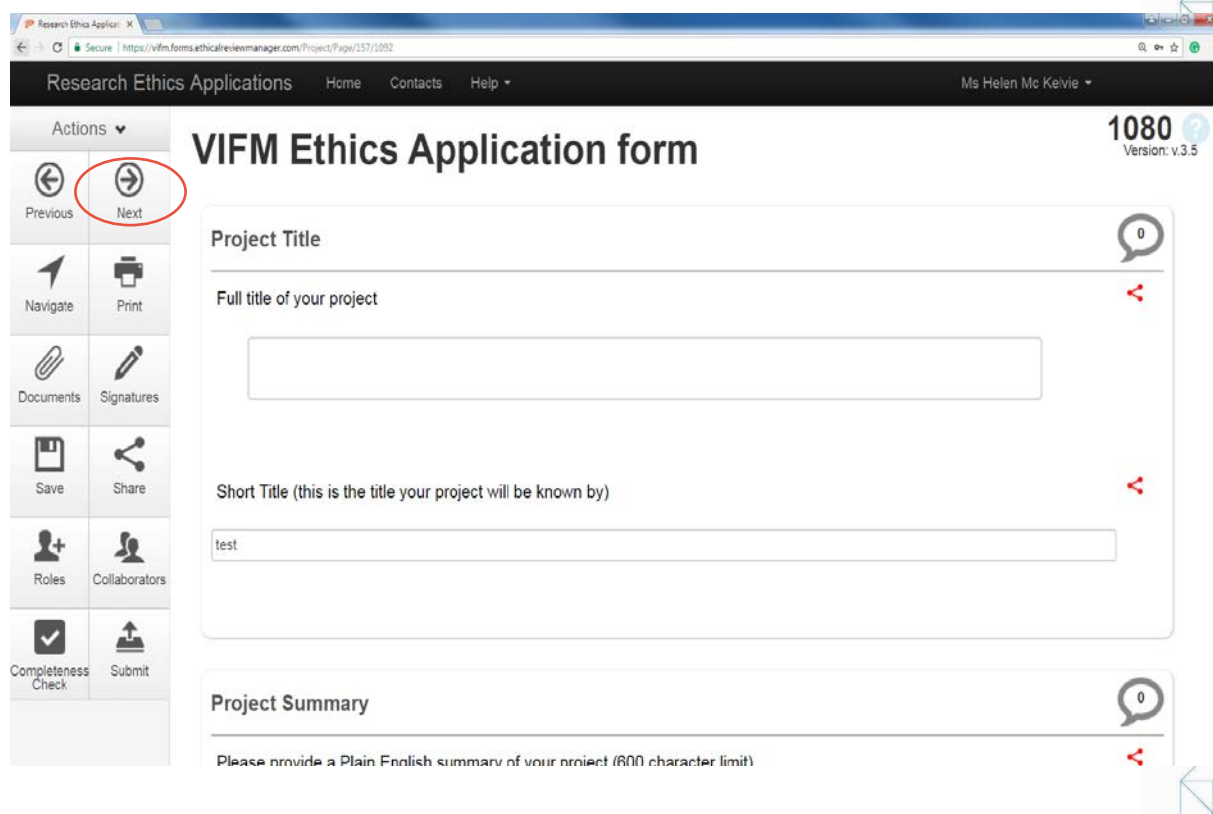


Click on “Project Title and Summary” to begin filling out the form.

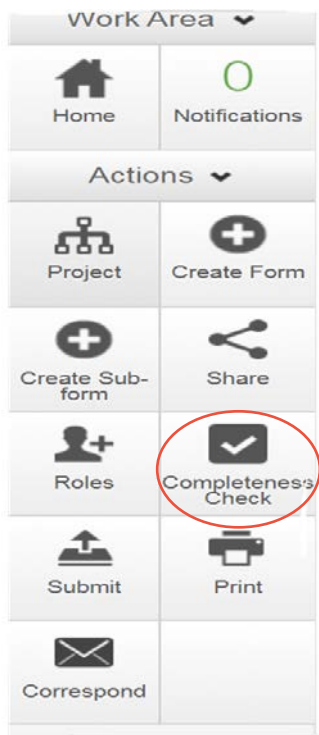


Click on “Next” tile in the navigation bar to go to the next page of the application form and on the “Previous” tile to go back a page. The “Navigate” tile can be used to bring you to particular sections of the form. To navigate the form simply click the name of the section listed in the index for the form and you will be redirected to that part of the application form.

If VIFM has updated the application form, you will see a yellow banner at the top of the browser. Simply click the “update text” highlighted in blue and the form will be updated.

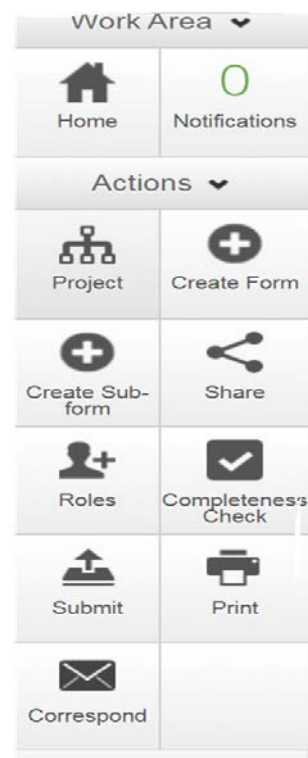


To check that you have completed the application form, click on “Completeness Check” to identify any incomplete sections. You will need to complete these sections before you can submit the form.



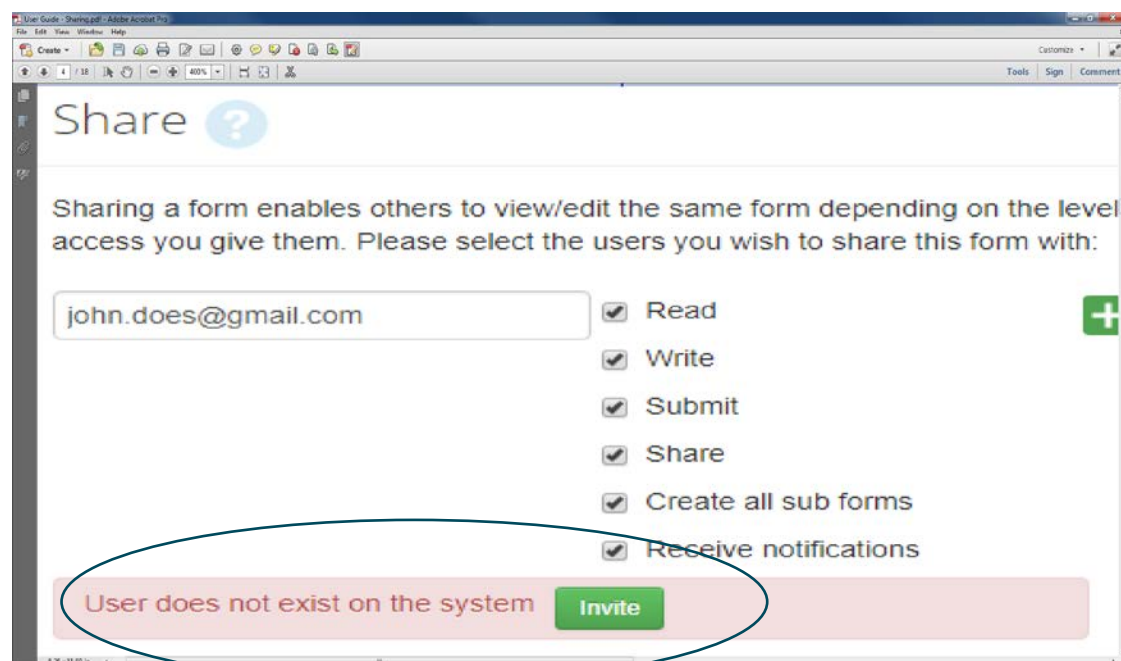
### 3. How to share your application form with others

If you wish to share your application form with co-investigators, managers, students or collaborators, click on the “Share” tile in the side navigation bar. By sharing your application form, the recipient is able to view and edit the form, depending on the level of access you have granted them. Clicking on “Share” will take you to the next screen.



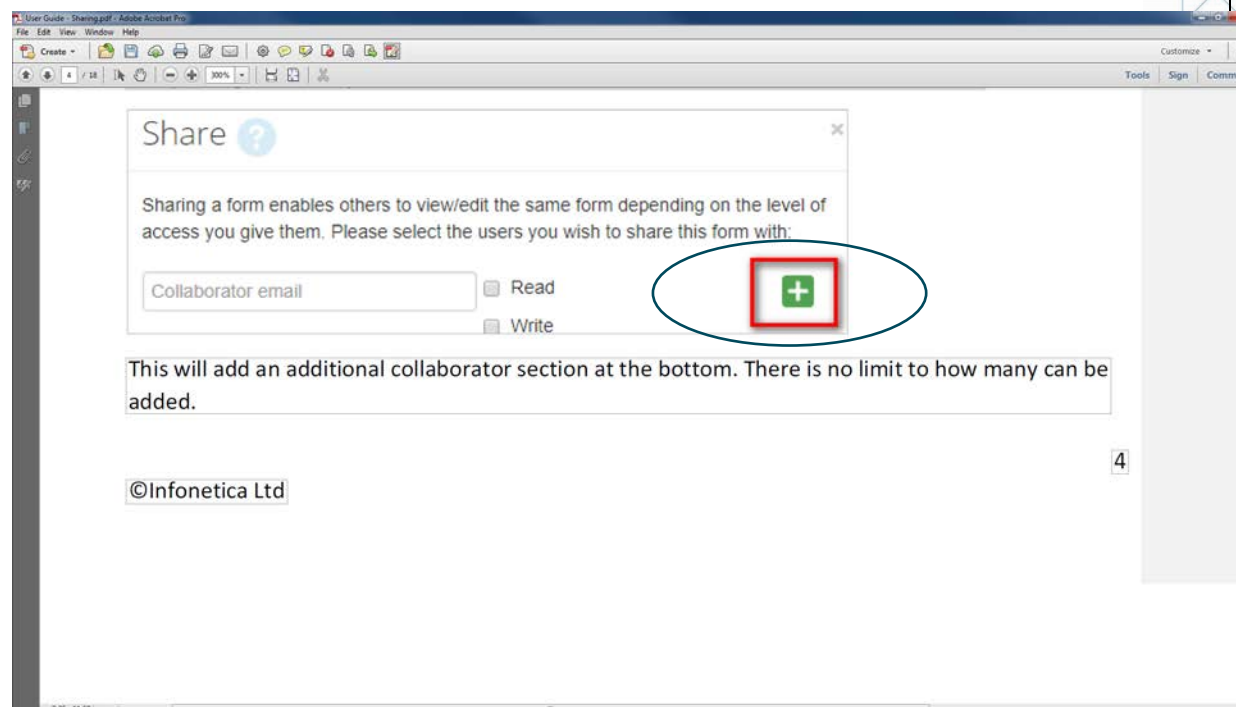
There are two ways you can select people to share the application with. You can enter the email address of the person you wish to share your form with.

If you insert an email address for a person who has not been registered on the ERM, a warning will be displayed with an option to invite the co-investigator to join the ERM – see below. You will need to click on the “invite” button to send the person you wish to share the form with an invitation to register on the ERM.

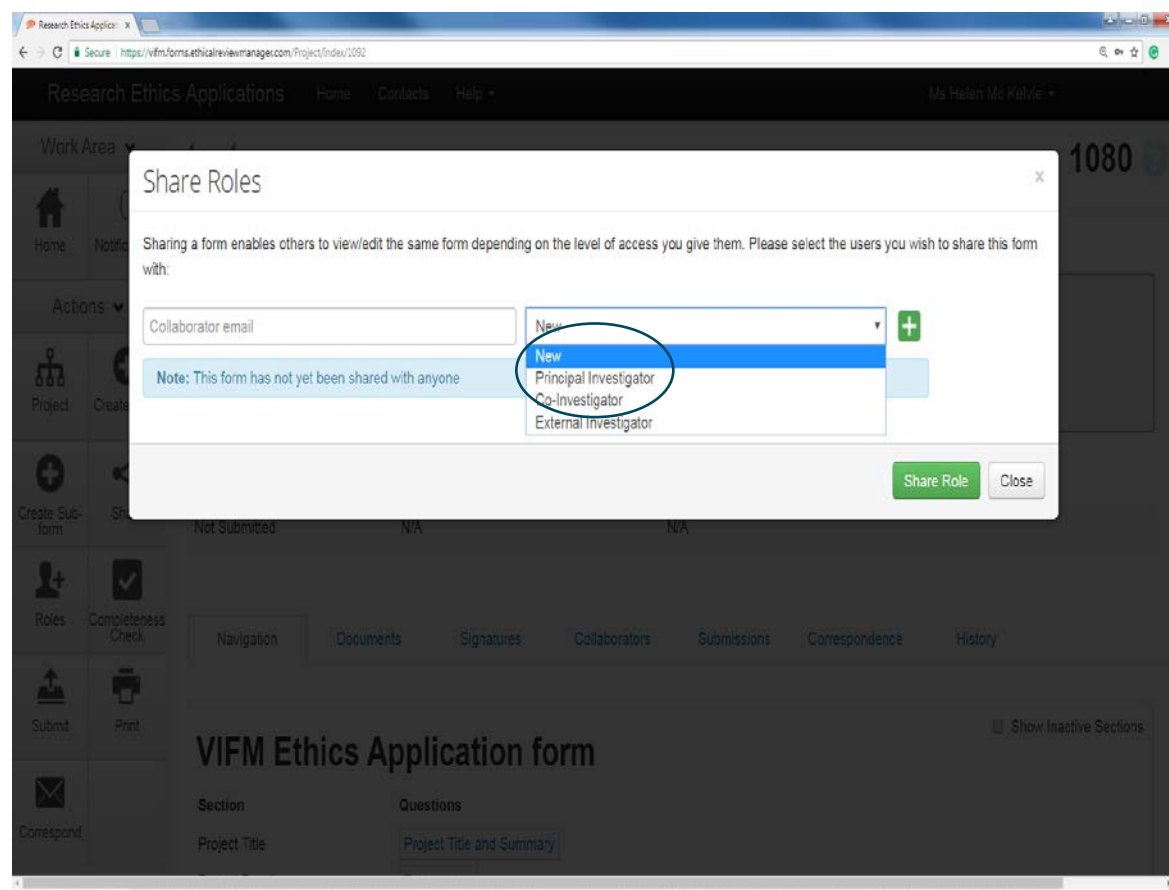




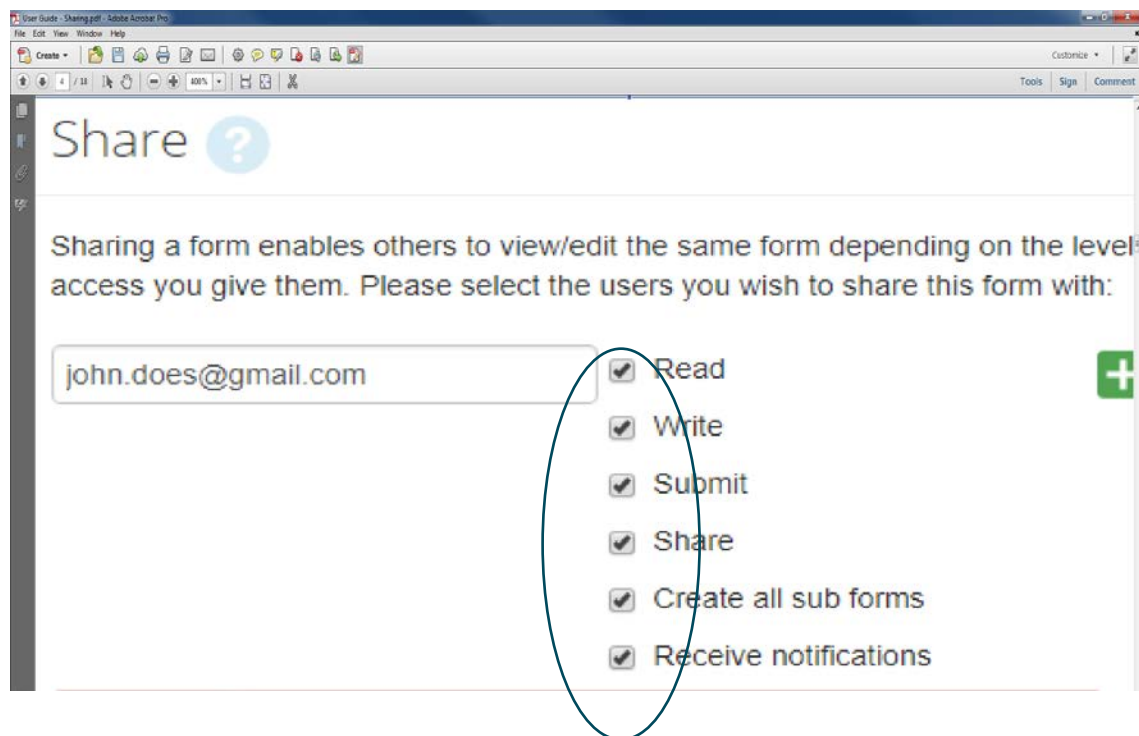
If the person with whom you wish to share the form is already registered on the ERM, you can also add them as a collaborator by clicking the “plus” sign shown below. Please note that all collaborators are added individually. This allows the permissions to be set individually.



You will need to select the role of the person that you wish to add as a collaborator.



You can set the level of access that a collaborator has by ticking the boxes in the Share screen shown below. “Read” only access will only allow the collaborator to read the form. “Read and Write” access allows the collaborator to read and edit the form. Full access allows the collaborator to read, write, share and submit the form, giving the same permissions for form held by the original owner.



Share ?

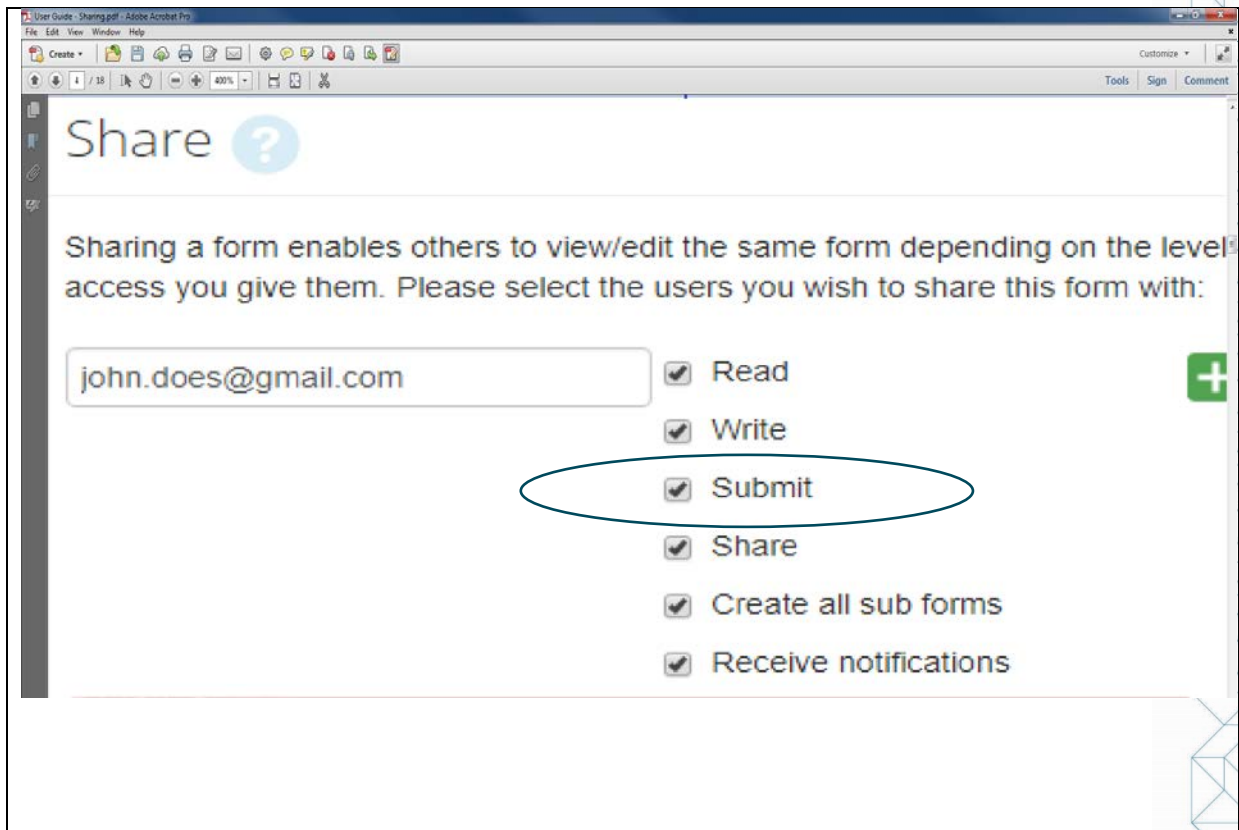
Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

john.does@gmail.com

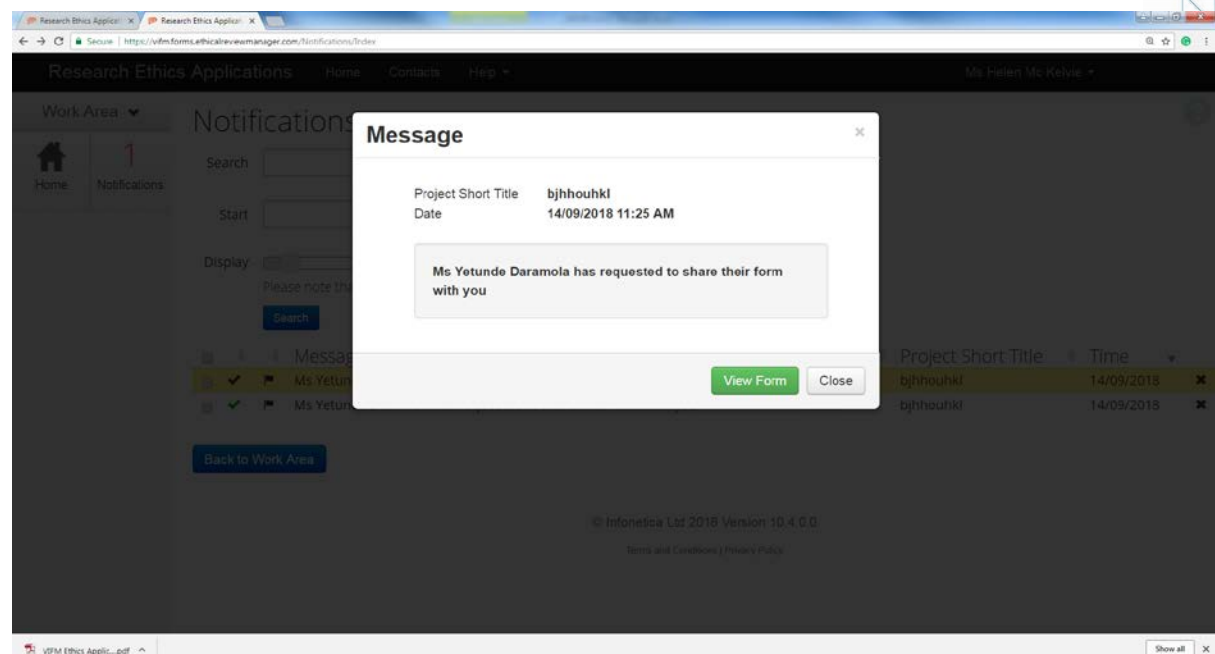
- ☒ Read
- ☒ Write
- ☒ Submit
- ☒ Share
- ☒ Create all sub forms
- ☒ Receive notifications

If the application is shared as “Write” it is possible that two or more collaborators will be editing the same panel. A warning will be displayed, but note that the application changes will be saved by whoever saves them last. It is advised that you restrict the “write” access to the key investigators, so that you can track changes to the form more easily.

If you have prepared the application form as a co-investigator, and would like the principal investigator to submit the form, share it with the principal investigator and select “Submit” in the menu below.



Once you have shared the application the person will receive the following message in their ERM.



Once added, the collaborators are visible by clicking on the “Collaborators” tile.

Research Ethics Applications | Home | Contacts | Help | Ms Helen Mc Kelvie

1080 Version: v.3.5

## VIFM Ethics Application form

**Project Title**

Full title of your project

Short Title (this is the title your project will be known by)

test

**Project Summary**

Please provide a Plain English summary of your project (800 character limit)

**Actions:** Previous, Next, Navigate, Print, Documents, Signatures, Save, Share, Roles, Collaborators (circled), Completeness Check, Submit

You can edit the level of access given to each collaborator by clicking on the “Edit Permissions” button.

Research Ethics Applications | Home | Contacts | Help | Ms Yetunde Daramola

### Collaborators

A list of the current collaborators for this form:

Name	Access	Edit Permissions
Ms Fiona Leahy	Read, Write, Submit, Share, Create all sub forms, Receive notifications	<b>Edit Permissions</b> (circled)
Ms Yetunde Daramola	Project Owner and Form Owner	Edit Permissions
Ms Helen Mc Kelvie	Read, Write	Edit Permissions

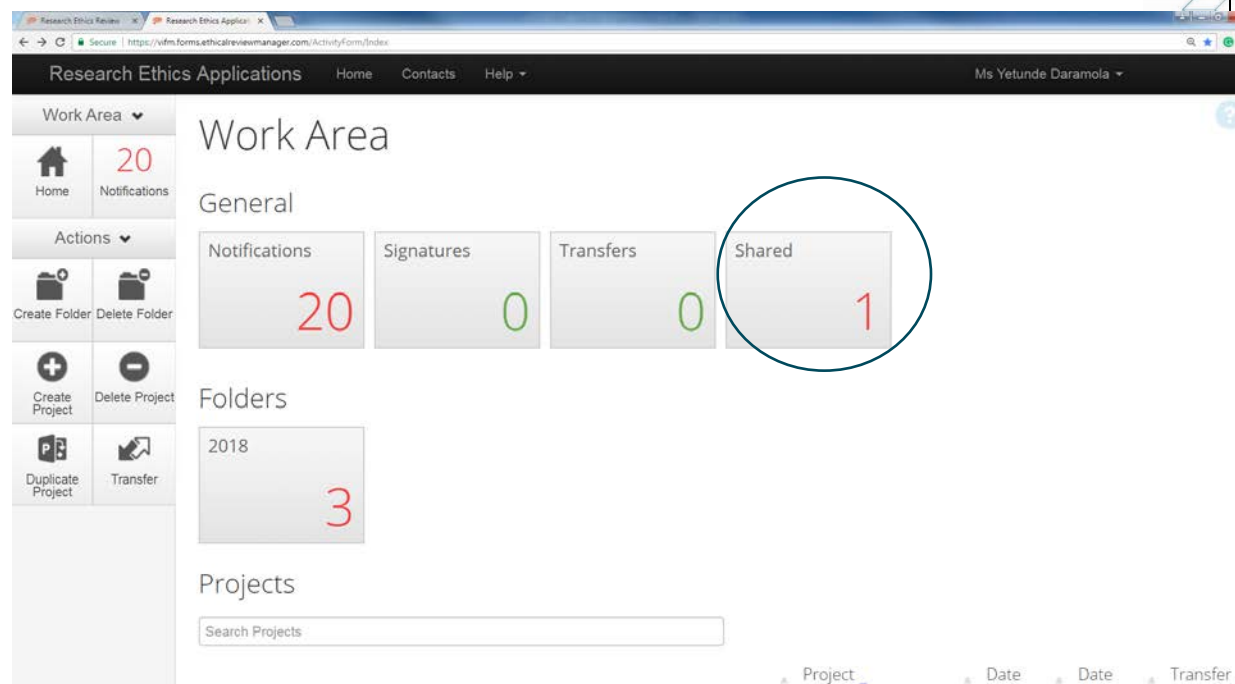
Close

Percentage contribution on project: 80

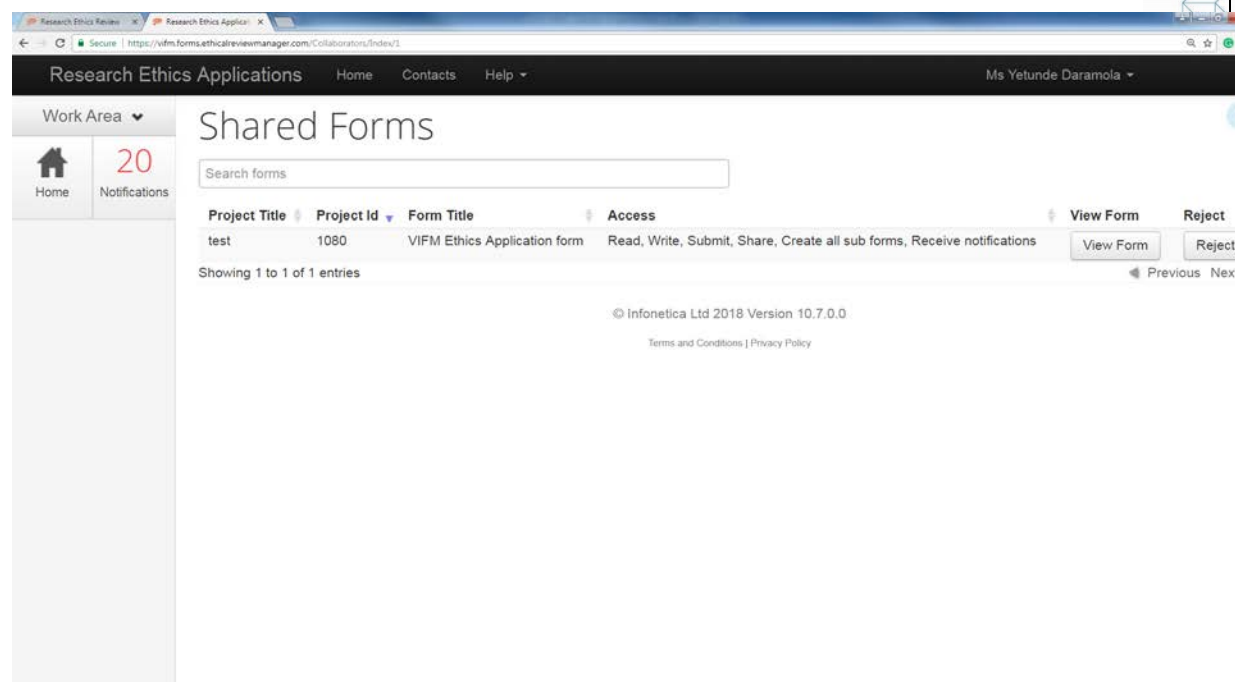
Are there any others involved in the project? (please tick all that apply)



The “Share” tile will signify how many share requests you have, these can be accessed by clicking on the tile and clicking on the share table.



The screenshot shows the 'Research Ethics Applications' dashboard. The 'Work Area' section displays four tiles: Notifications (20), Signatures (0), Transfers (0), and Shared (1). The 'Shared' tile is circled in blue. Below the tiles, there is a 'Folders' section with a '2018' folder containing 3 items. The 'Projects' section has a search bar and a table with columns: Project, Date, Date, and Transfer.



The screenshot shows the 'Shared Forms' section of the dashboard. It includes a search bar and a table with the following data:

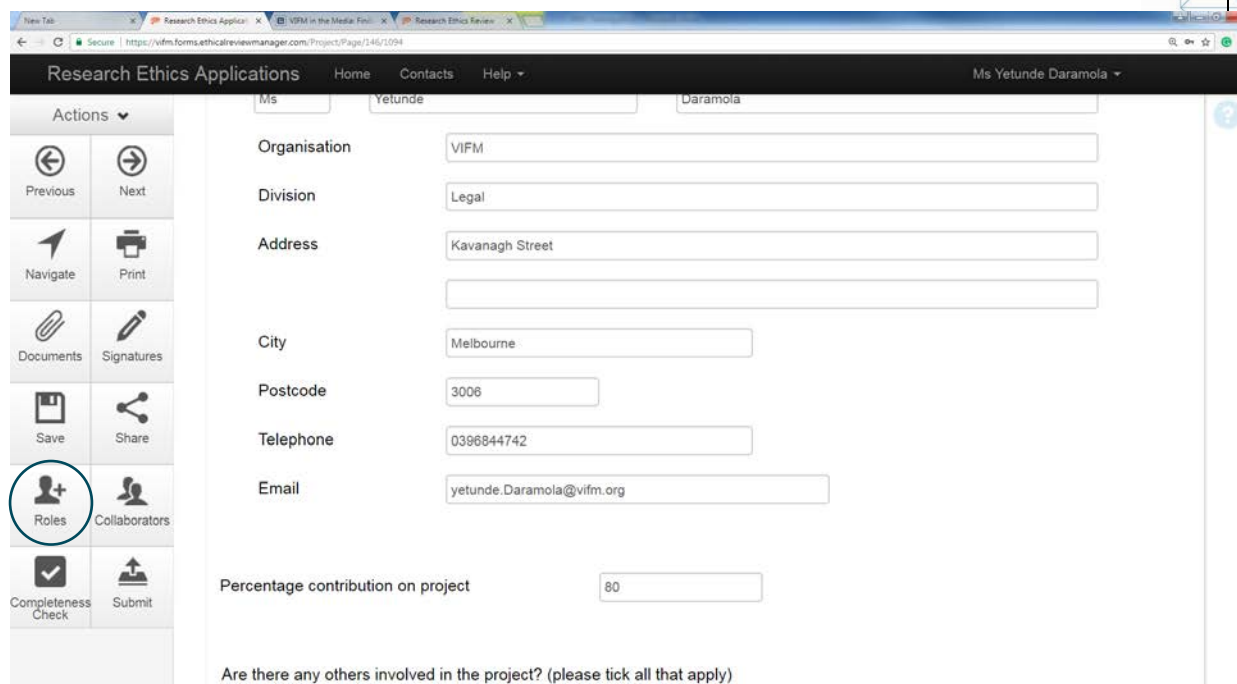
Project Title	Project Id	Form Title	Access	View Form	Reject
test	1080	VIFM Ethics Application form	Read, Write, Submit, Share, Create all sub forms, Receive notifications	<a href="#">View Form</a>	<a href="#">Reject</a>

Showing 1 to 1 of 1 entries

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Clicking on “Role” enables the same function as the “Share button”. You can specify the level of access for each collaborator. Permissions and access can also be given using applicant roles.



Research Ethics Applications

Ms Yetunde Daramola

Ms Yetunde Daramola

Organisation: VIFM

Division: Legal

Address: Kavanagh Street

City: Melbourne

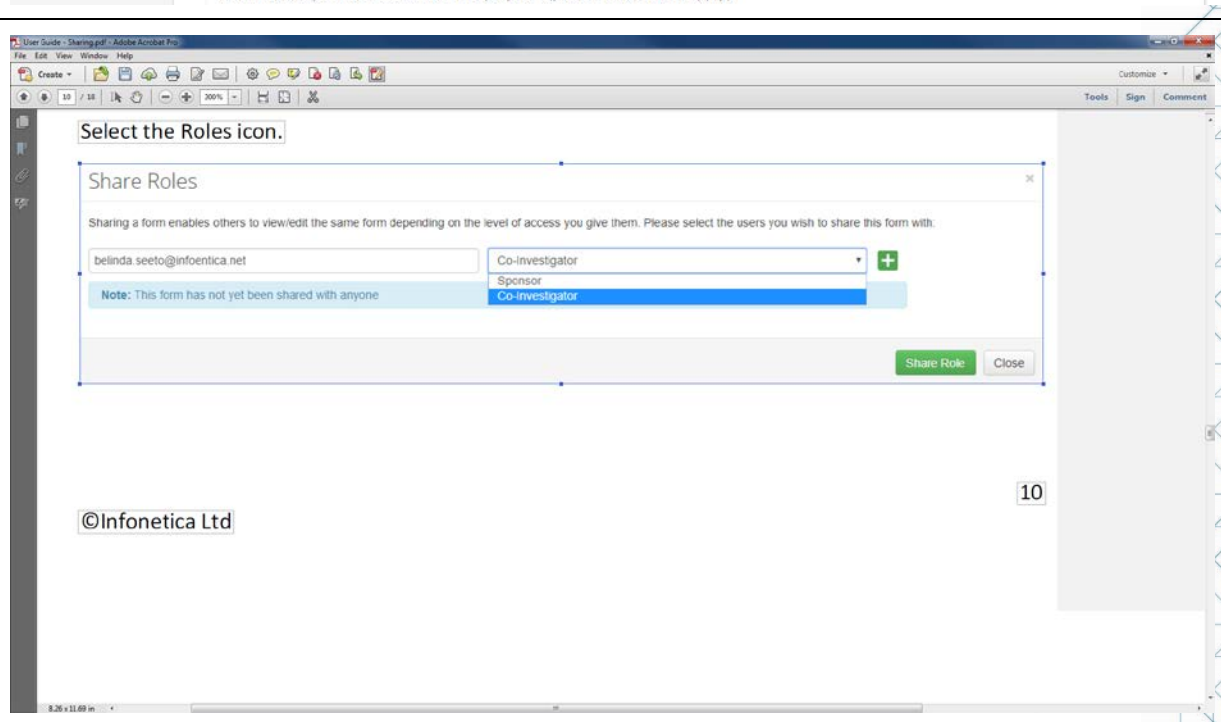
Postcode: 3006

Telephone: 0396844742

Email: yetunde.Daramola@vifm.org

Percentage contribution on project: 80

Are there any others involved in the project? (please tick all that apply)



Select the Roles icon.

Share Roles

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with.

belinda.seeto@infoetica.net

Note: This form has not yet been shared with anyone

Co-investigator

Sponsor

Co-investigator

Share Role

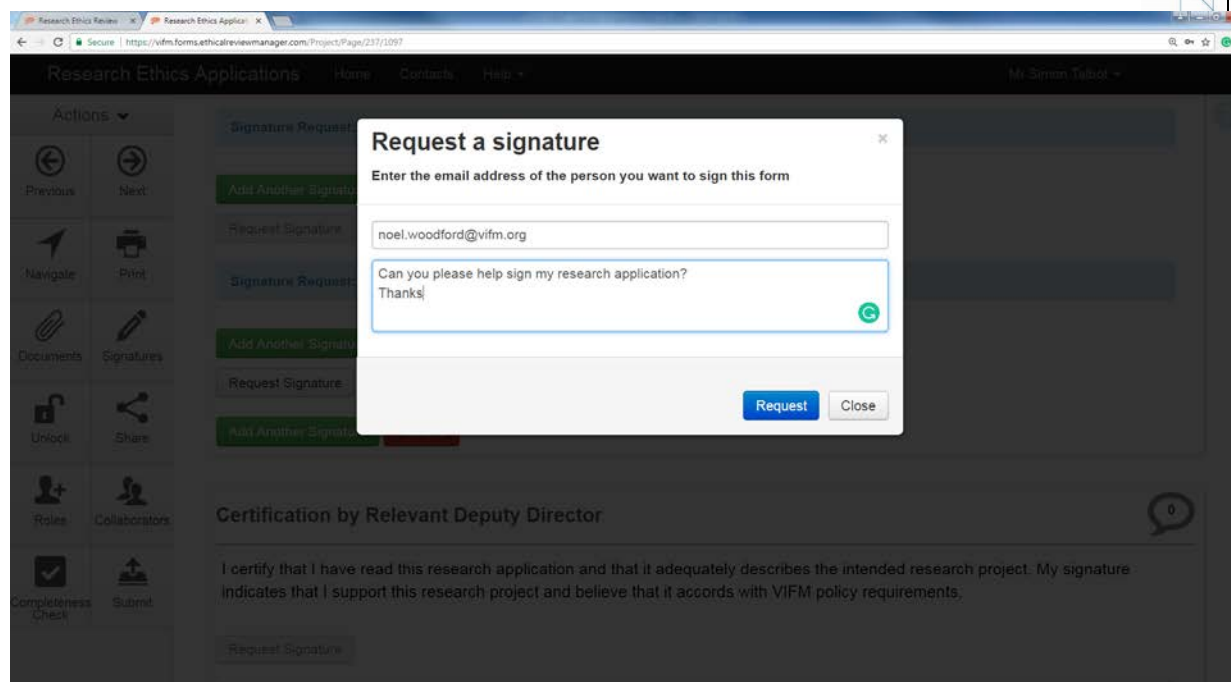
Close

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## 4. How to sign your application form

You sign your form by typing in your email address and clicking on sign.

You seek the signatures of the Head of Service and Head of Institution by clicking on request signature which takes you to the screen below, then you type in the email address and message and click on request to send your request.

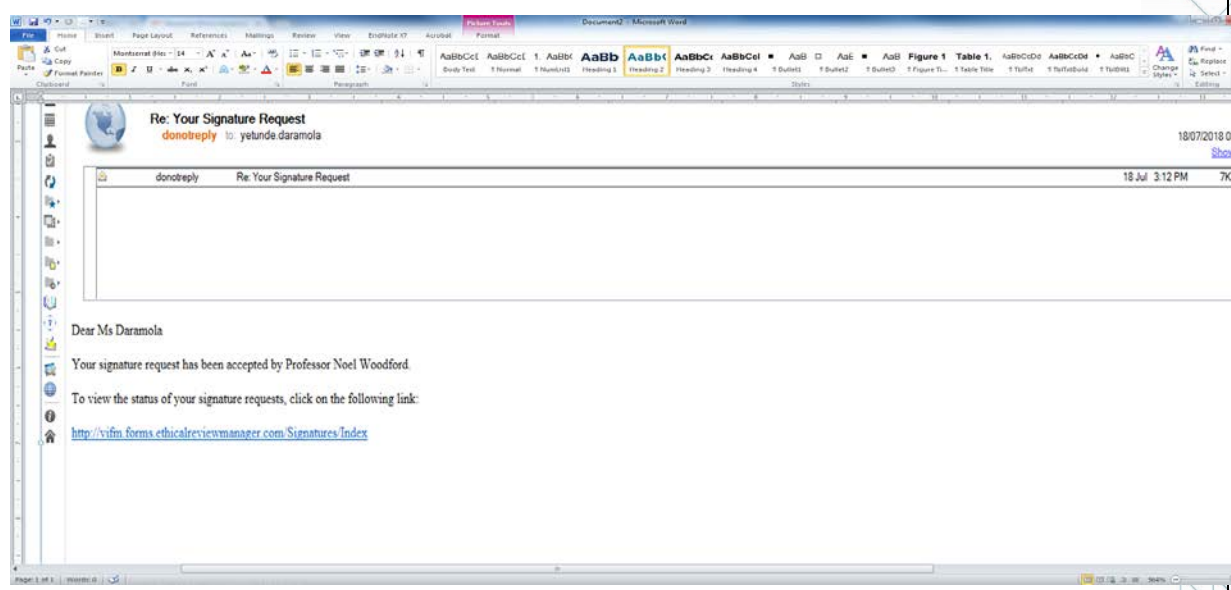


The screenshot shows a web browser window with the URL <https://vfm.forms.ethicalreviewmanager.com/Project/217/1097>. The page title is "Research Ethics Applications". A modal dialog box titled "Request a signature" is open. It contains the following text and fields:

- Enter the email address of the person you want to sign this form
- Text input field containing: noel.woodford@vifm.org
- Text input field containing: Can you please help sign my research application? Thanks
- Buttons: Request, Close

The background page shows a sidebar with navigation options: Previous, Next, Navigate, Print, Documents, Signatures, Unlock, Share, Roles, Collaborators, Completeness Check, and Submit. The main content area is titled "Certification by Relevant Deputy Director" and contains a certification statement: "I certify that I have read this research application and that it adequately describes the intended research project. My signature indicates that I support this research project and believe that it accords with VIFM policy requirements."

You will receive notification in your registered email when a task such as a signature request is completed.



The screenshot shows an email interface with the following details:

- From: donotreply
- To: yetunde daramola
- Subject: Re: Your Signature Request
- Date: 18 Jul 3:12 PM
- Body:
 

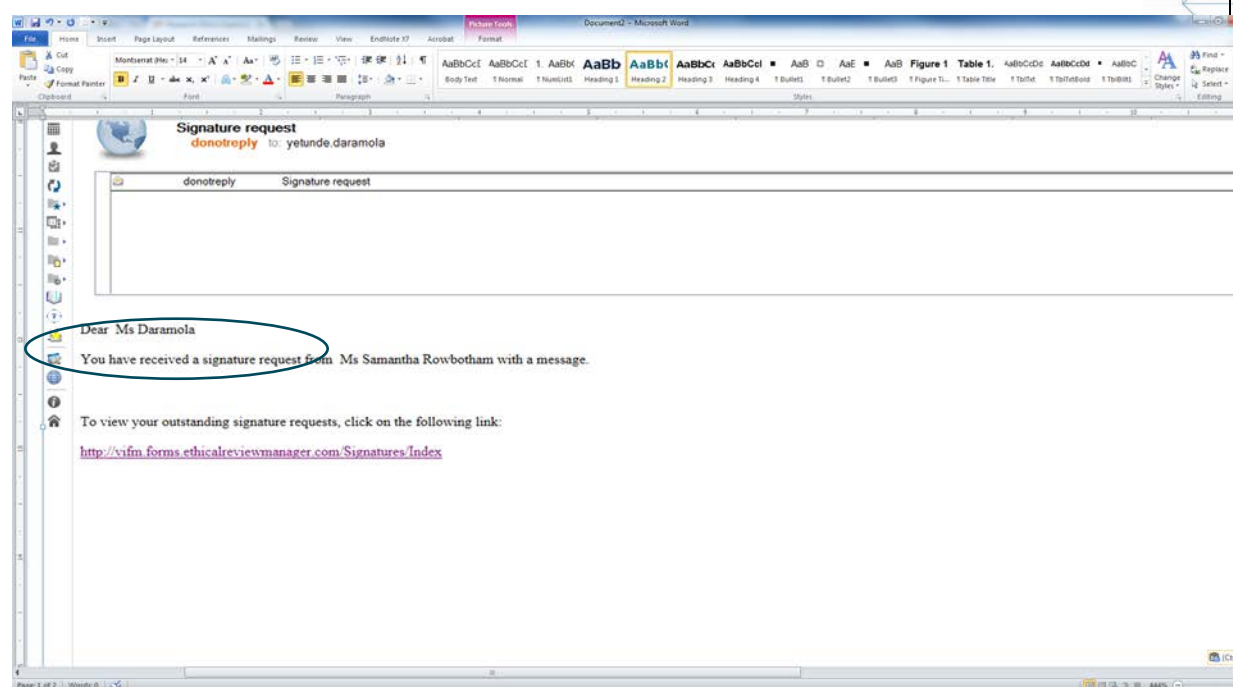
Dear Ms Daramola

Your signature request has been accepted by Professor Noel Woodford.

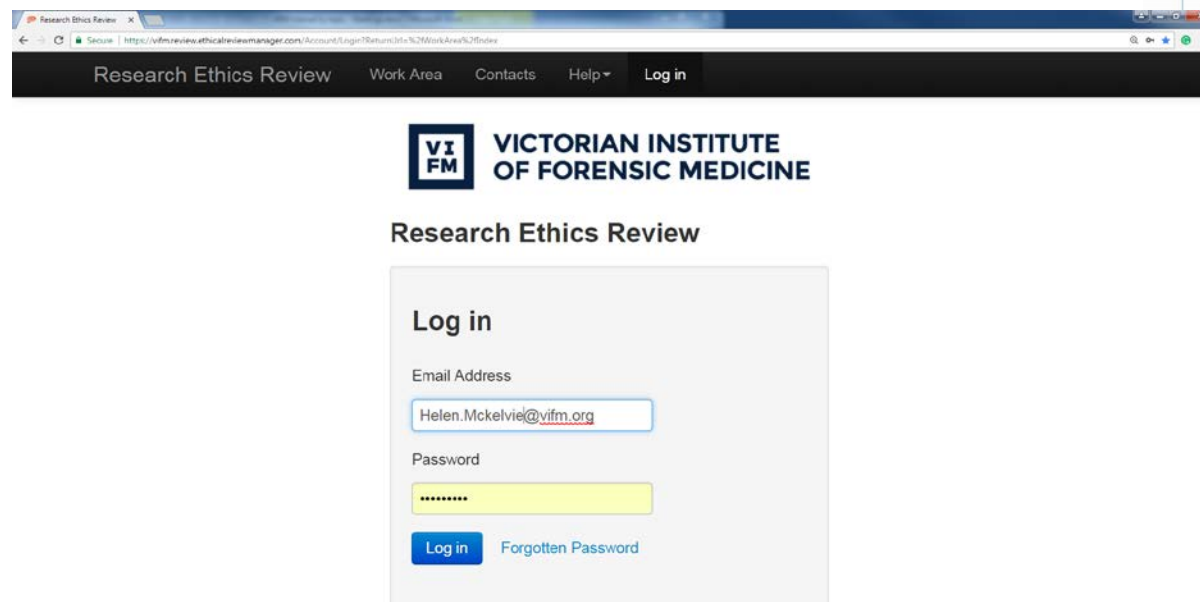
To view the status of your signature requests, click on the following link:

<http://vfm.forms.ethicalreviewmanager.com/Signatures/Index>

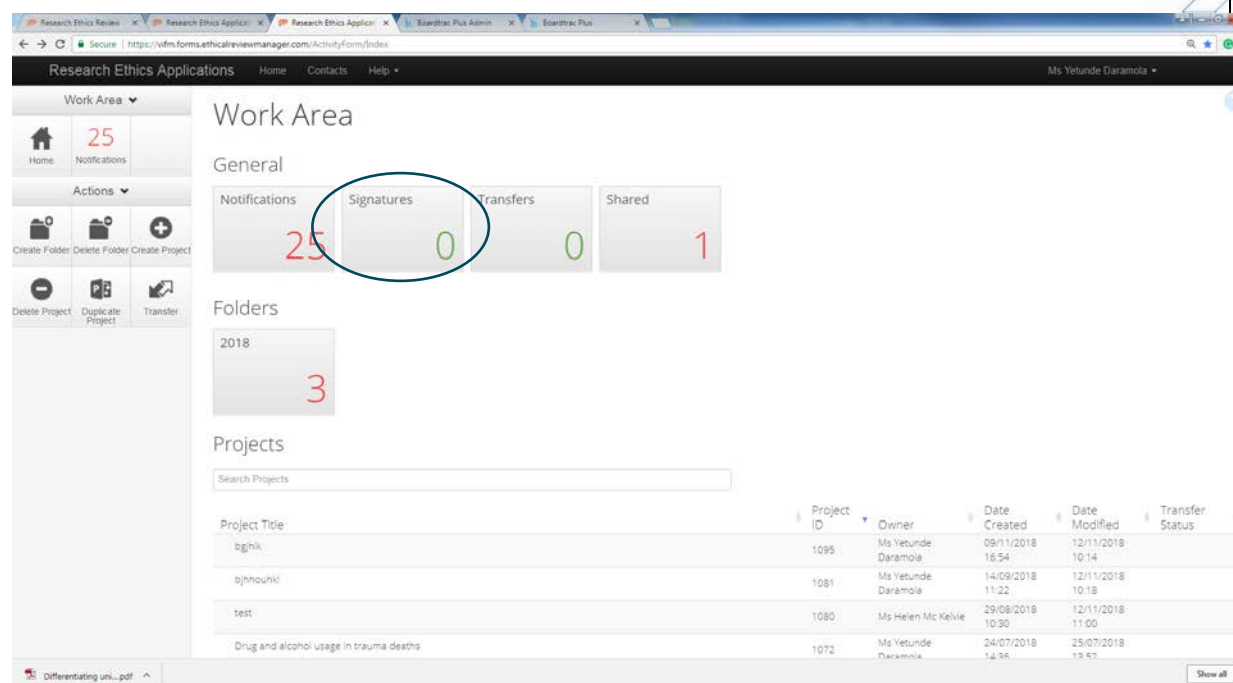
If you receive a request from a co-investigator for your signature on an application, you will receive an email as set out below. To sign a form, just click on the link in the email notifying you of the signature request.



This will take you to the home page, where you log in and view the form. To sign, you need to enter your registered email address and click “Sign”. You will not be able to sign a form if you do not view it or if you are not a registered user.

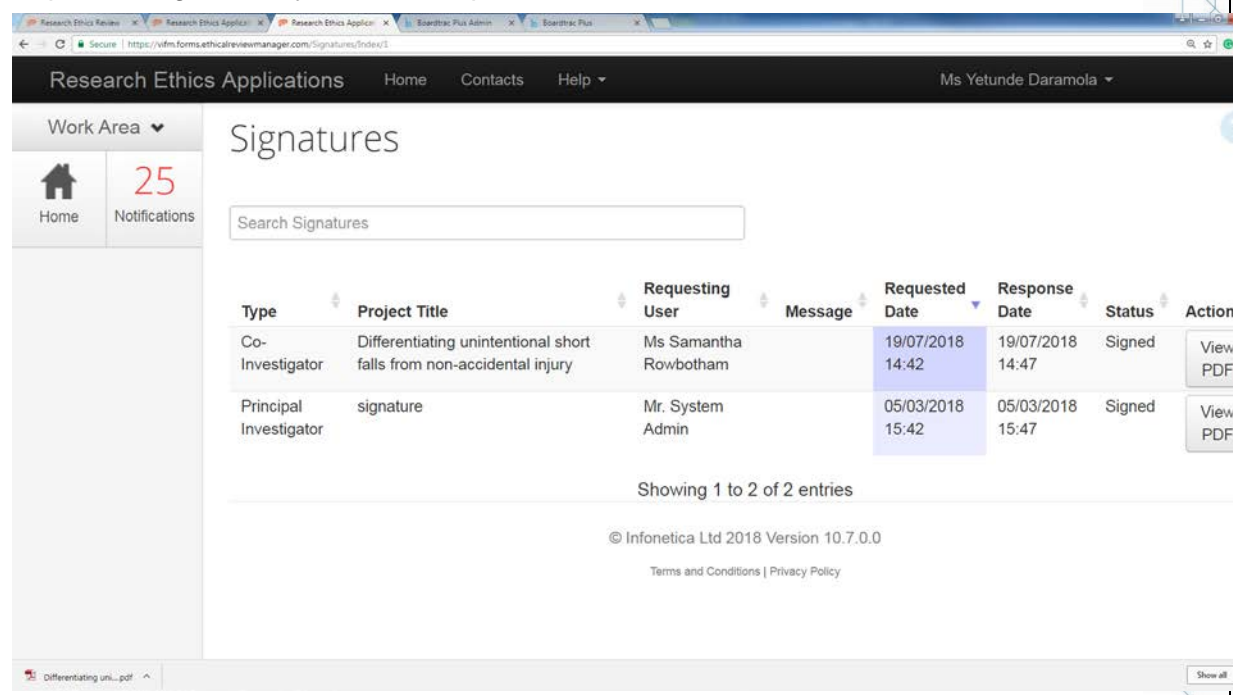


You can view all of the signatures and requests for signatures by clicking on the “Signatures” tile located in your “Work Area”.



Project Title	Project ID	Owner	Date Created	Date Modified	Transfer Status
bgjhik	1095	Ms Yetunde Daramola	09/11/2018 16:54	12/11/2018 10:14	
bjhhouhki	1081	Ms Yetunde Daramola	14/09/2018 11:22	12/11/2018 10:18	
test	1080	Ms Helen Mc Kevie	29/08/2018 10:30	12/11/2018 11:00	
Drug and alcohol usage in trauma deaths	1072	Ms Yetunde Daramola	24/07/2018 14:34	25/07/2018 13:47	

A box will appear displaying both the signatures that are on the form along with the requested signatures yet to be completed – see screen below.



Type	Project Title	Requesting User	Message	Requested Date	Response Date	Status	Action
Co-Investigator	Differentiating unintentional short falls from non-accidental injury	Ms Samantha Rowbotham		19/07/2018 14:42	19/07/2018 14:47	Signed	<a href="#">View PDF</a>
Principal Investigator	signature	Mr. System Admin		05/03/2018 15:42	05/03/2018 15:47	Signed	<a href="#">View PDF</a>

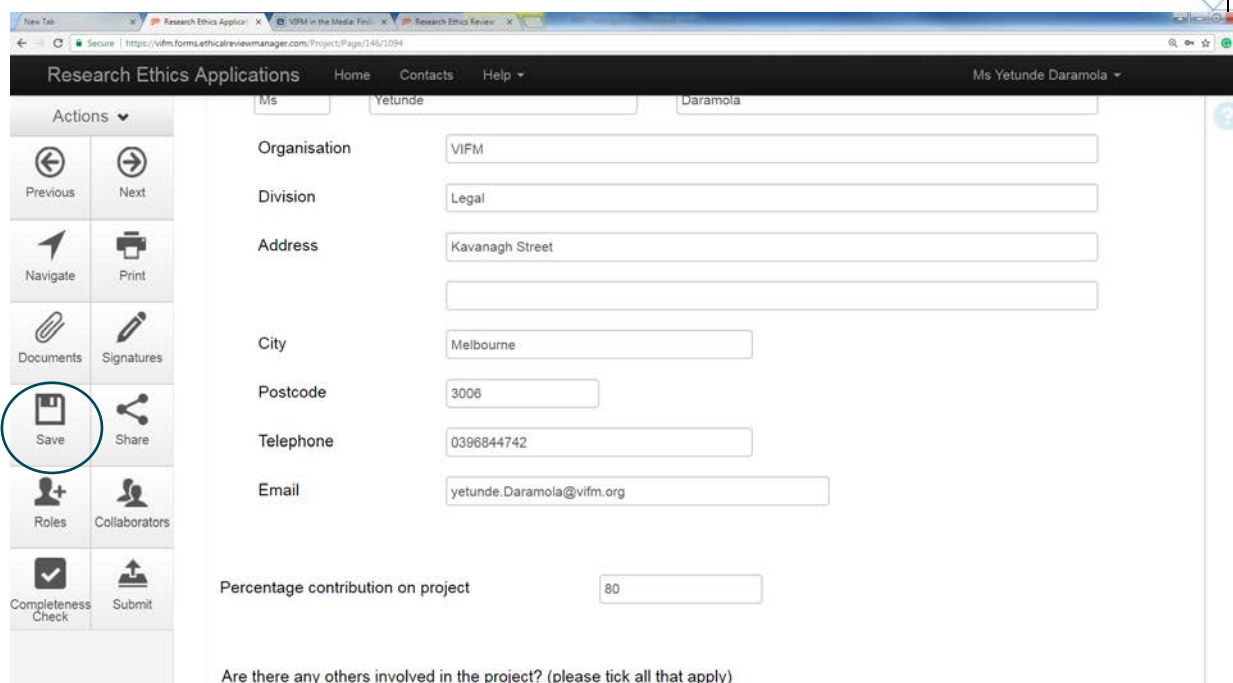
Showing 1 to 2 of 2 entries

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## 5. How to save and submit your application form

To save changes to the form simply click the “Save” tile located on the side navigation bar.



The screenshot shows a web browser window with the URL <https://vfm.forms.ethicalreviewmanager.com/Project/Page/146/1094>. The page title is "Research Ethics Applications". The user is logged in as "Ms Yetunde Daramola". The form contains the following fields:

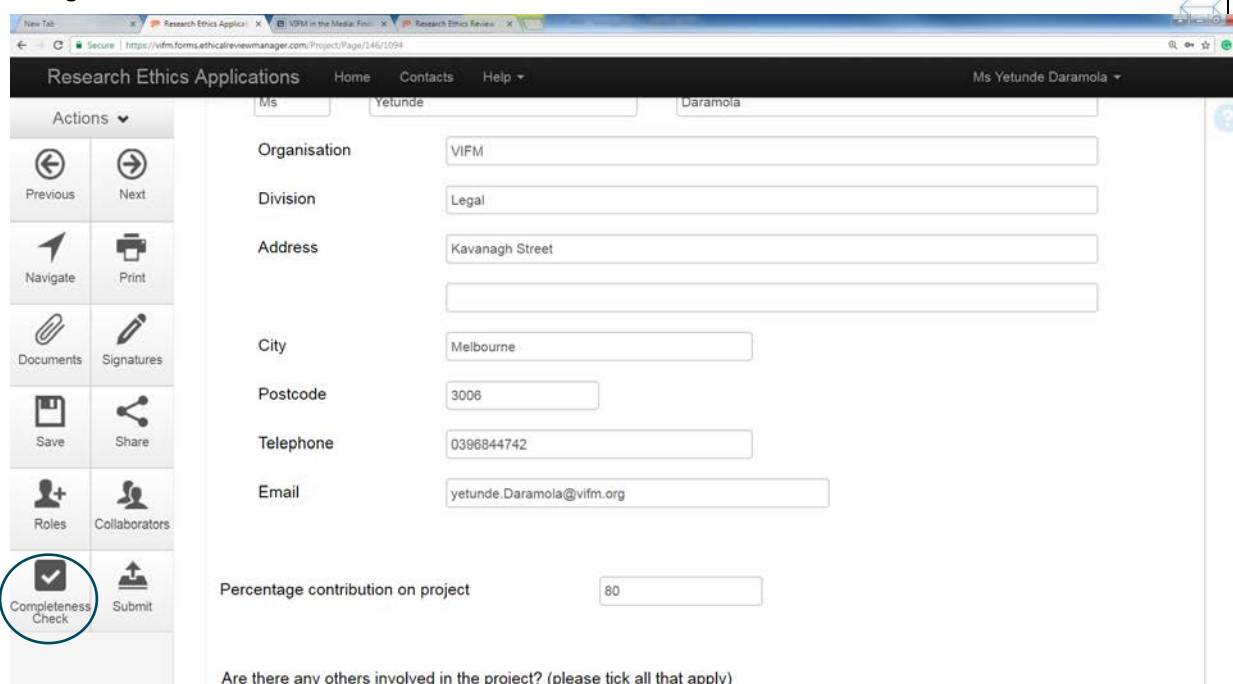
- Organisation: VIFM
- Division: Legal
- Address: Kavanagh Street
- City: Melbourne
- Postcode: 3006
- Telephone: 0396844742
- Email: yetunde.Daramola@vifm.org
- Percentage contribution on project: 80

The side navigation bar on the left contains the following tiles:

- Previous
- Next
- Navigate
- Print
- Documents
- Signatures
- Save** (highlighted with a red circle)
- Share
- Roles
- Collaborators
- Completeness Check
- Submit

At the bottom of the form, there is a question: "Are there any others involved in the project? (please tick all that apply)".

You can only submit a form if all of the relevant questions have been answered. You may conduct a completeness check by clicking on the “Completeness Check” tile in the side navigation bar.

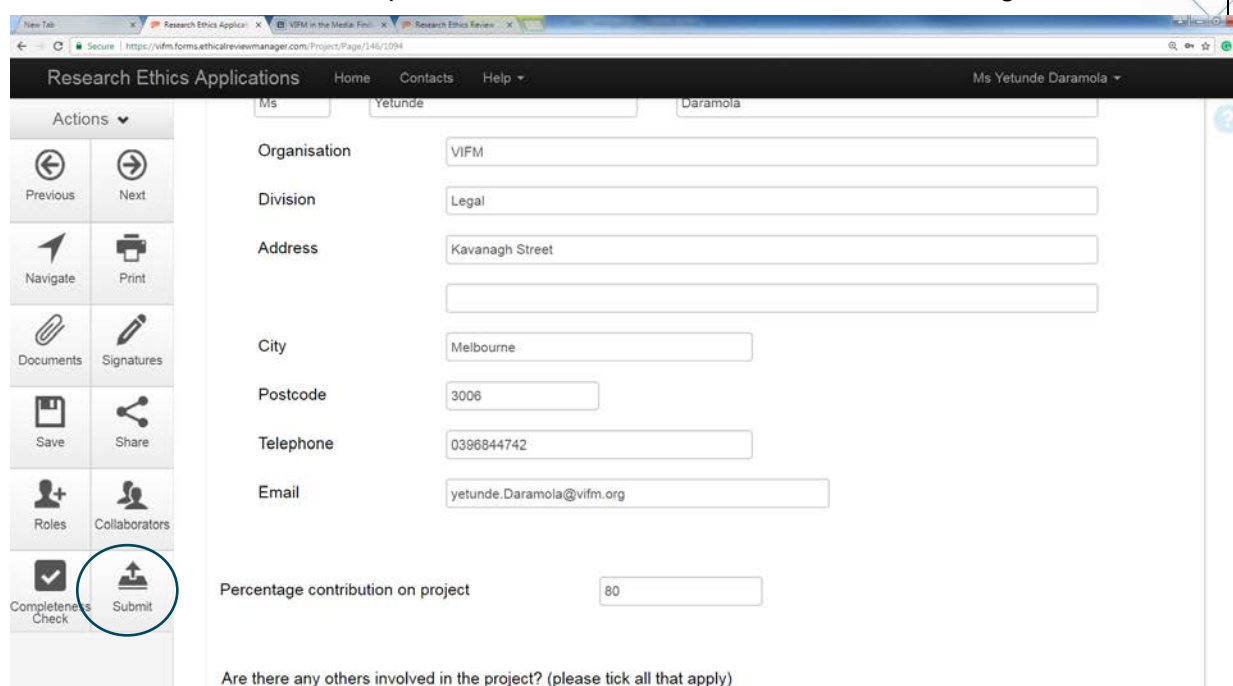


The screenshot shows the same web browser window as the previous one. The form content is identical. The side navigation bar on the left contains the same tiles as before, but the "Completeness Check" tile is now highlighted with a red circle.

At the bottom of the form, there is a question: "Are there any others involved in the project? (please tick all that apply)".



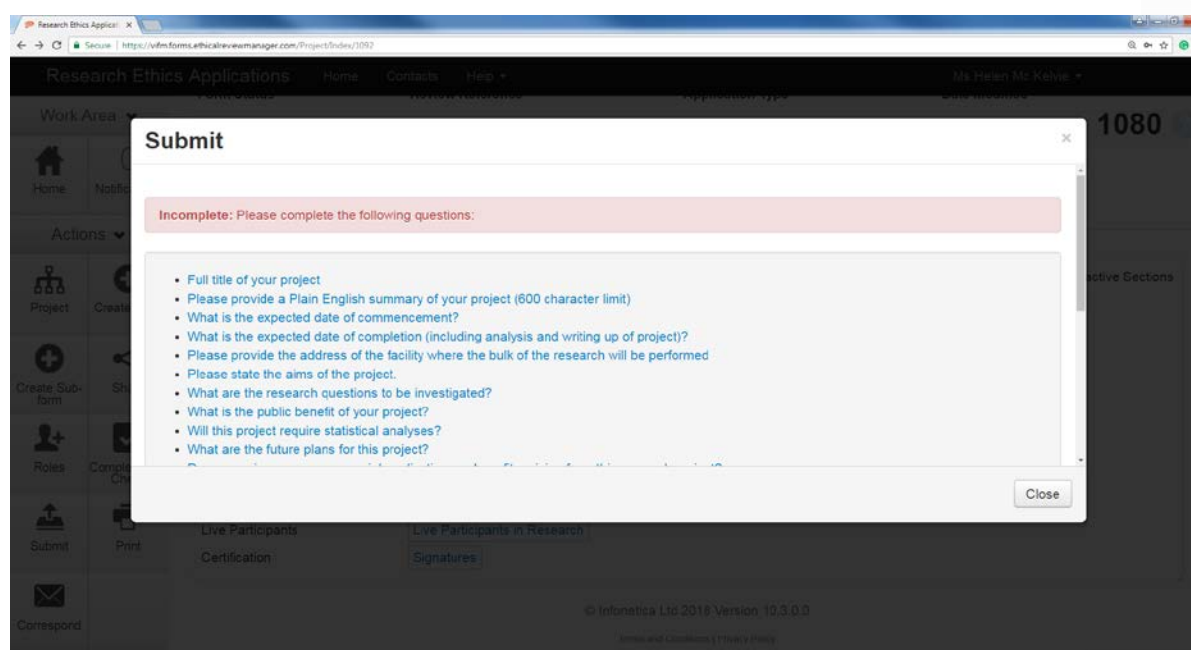
Once the form has been completed, click on the “Submit” tile in the side navigation bar.



The screenshot shows the 'Research Ethics Applications' form. The side navigation bar on the left contains several icons, with the 'Submit' icon (a document with an upward arrow) circled in blue. The main form area contains fields for: Organisation (VIFM), Division (Legal), Address (Kavanagh Street), City (Melbourne), Postcode (3006), Telephone (0396844742), Email (yetunde.Daramola@vifm.org), and Percentage contribution on project (80). At the bottom, there is a question: 'Are there any others involved in the project? (please tick all that apply)'.

When you have clicked on the “Submit” tile, there will be two automatic completeness checks: the first to check that all relevant questions have been answered, and the second to ensure that any “parent” forms have been submitted before a “sub-form” is submitted.

If all the sections have not been completed, you will get the following message and you will not be able to submit your form. A list of all incomplete items will be displayed in a box. You can click on each item to take you to the question that needs to be completed.



The screenshot shows a 'Submit' dialog box with a red header bar that says 'Incomplete: Please complete the following questions:'. Below this, there is a list of incomplete items:

- Full title of your project
- Please provide a Plain English summary of your project (600 character limit)
- What is the expected date of commencement?
- What is the expected date of completion (including analysis and writing up of project)?
- Please provide the address of the facility where the bulk of the research will be performed
- Please state the aims of the project.
- What are the research questions to be investigated?
- What is the public benefit of your project?
- Will this project require statistical analyses?
- What are the future plans for this project?

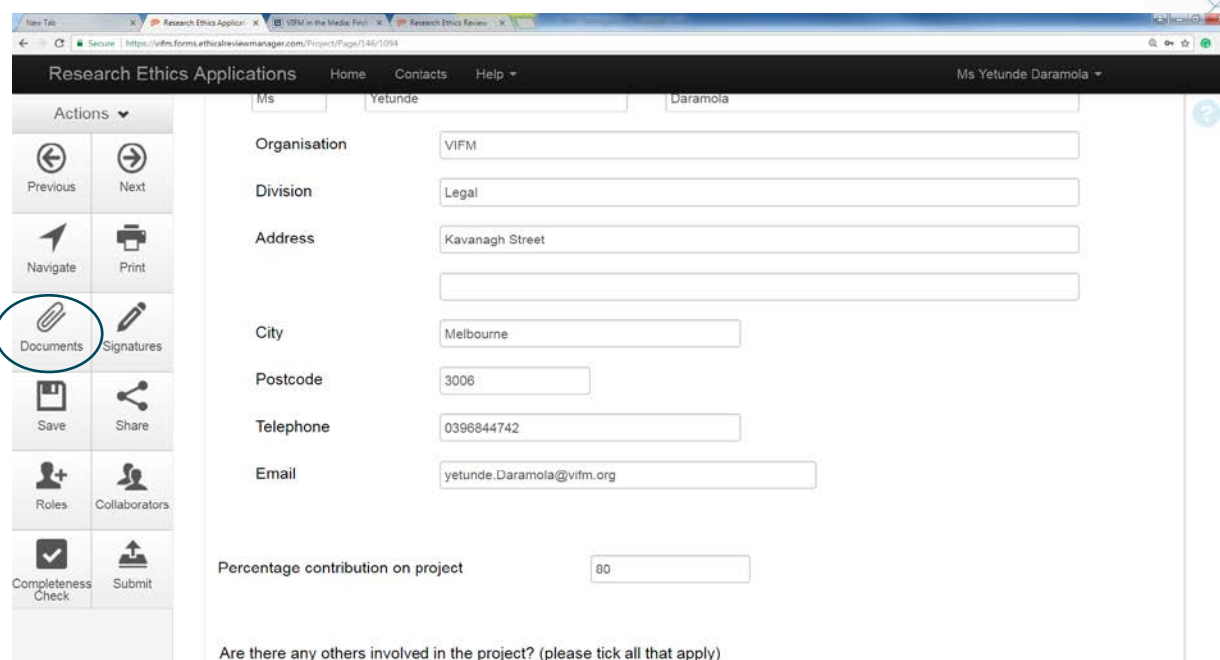
At the bottom right of the dialog box is a 'Close' button. The background shows the 'Research Ethics Applications' form with the 'Submit' button highlighted.



If the form is complete, click the Submit tile to submit the form and on successful submission you will be re-directed to a page congratulating you on your submission.

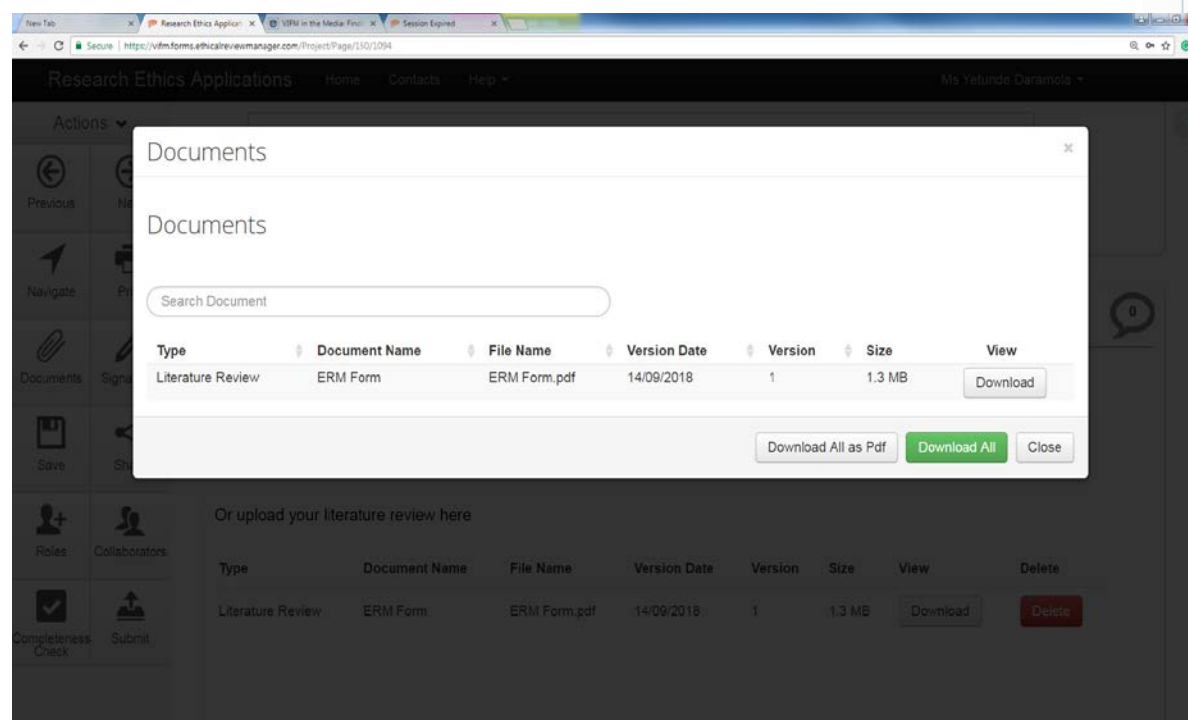
## 6. How to download or view documents attached to a research application

To download or view an attachment to a research form (such a uploaded literature review), click on the “ Documents” tile in the side navigation bar. This will display a table with all of the form documents.



The screenshot shows the 'Research Ethics Applications' form. The side navigation bar on the left has a 'Documents' tile highlighted with a red circle. The main form area displays fields for Organisation (VIFM), Division (Legal), Address (Kavanagh Street), City (Melbourne), Postcode (3006), Telephone (0396844742), and Email (yetunde.Daramola@vifm.org). The 'Percentage contribution on project' is set to 80. At the bottom, there is a question: 'Are there any others involved in the project? (please tick all that apply)'.

You are able to download the document as a PDF and print as per normal.



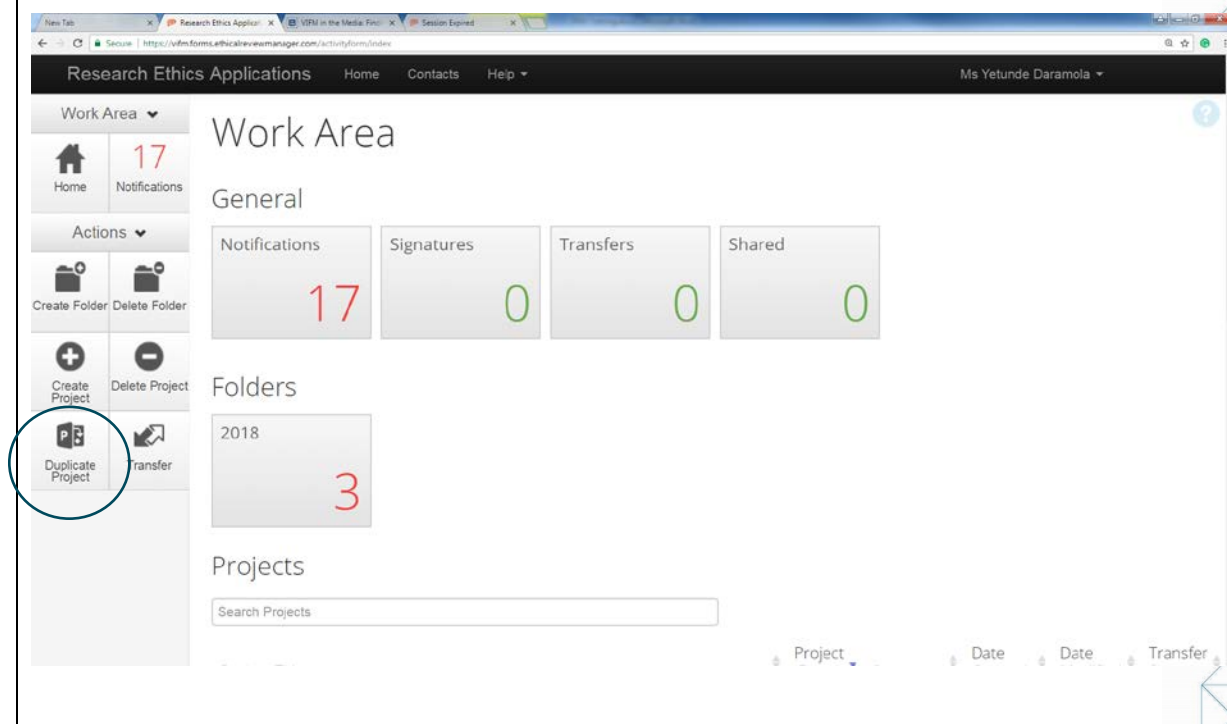
The screenshot shows the 'Research Ethics Applications' form with the 'Documents' modal window open. The modal window has a search bar and a table of documents. The table has columns: Type, Document Name, File Name, Version Date, Version, Size, and View. The table contains one row: Literature Review, ERM Form, ERM Form.pdf, 14/09/2018, 1, 1.3 MB, and a 'Download' button. Below the table are buttons for 'Download All as Pdf', 'Download All', and 'Close'. The background form is dimmed.

Type	Document Name	File Name	Version Date	Version	Size	View
Literature Review	ERM Form	ERM Form.pdf	14/09/2018	1	1.3 MB	Download

## 7. How to duplicate an application form

If you wish to create a similar project to one that you have already completed, you can save time by duplicating an existing project and then editing the new application.

Click on the “Duplicate Project” tile in the side navigation bar, select the project you wish to duplicate from the dropdown menu and click the “Duplicate” button.



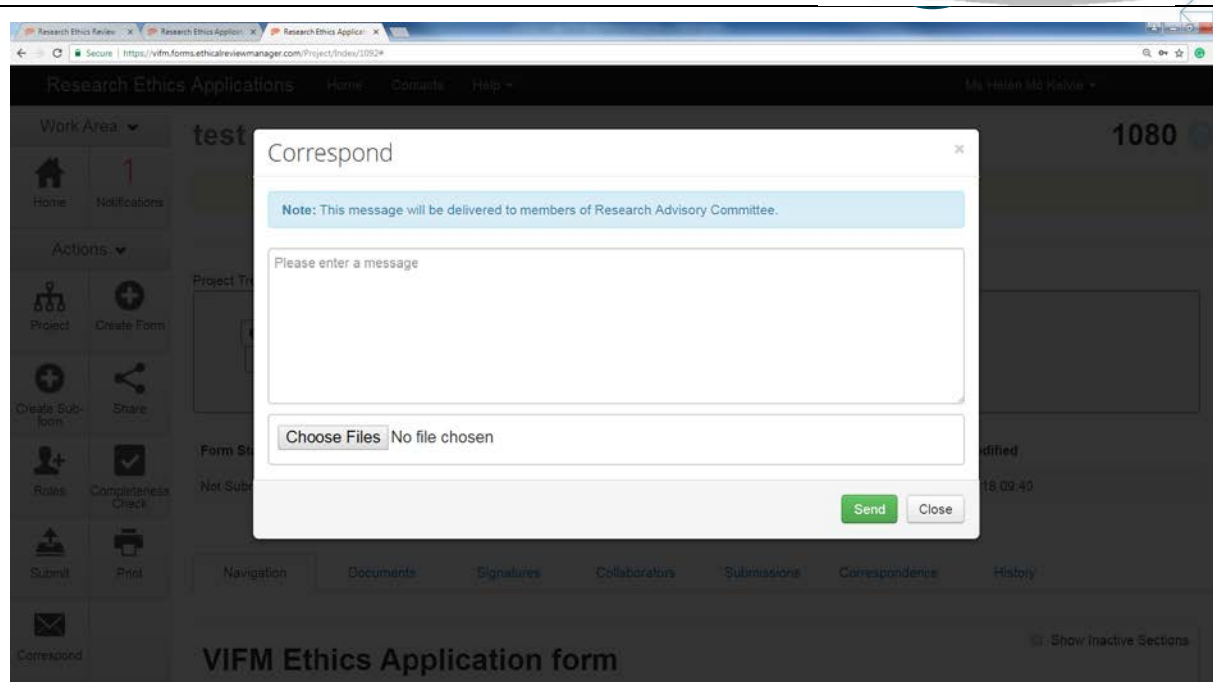
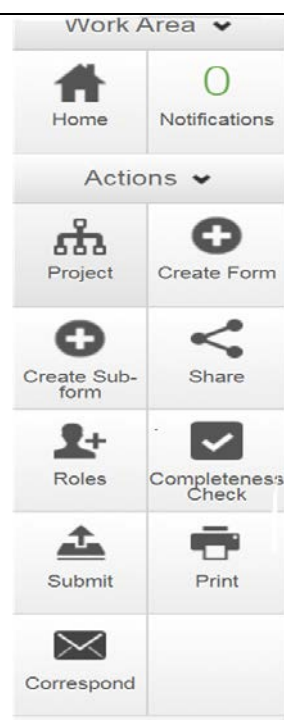
## 8. How to correspond through the ERM system

Applicants and collaborators can send messages to the Research Advisory Committee through the ERM system. It is also possible to send documents attached to a message.

Applicants will also receive notifications from reviewers and administrators.

Correspondence can be initiated before and after submission.

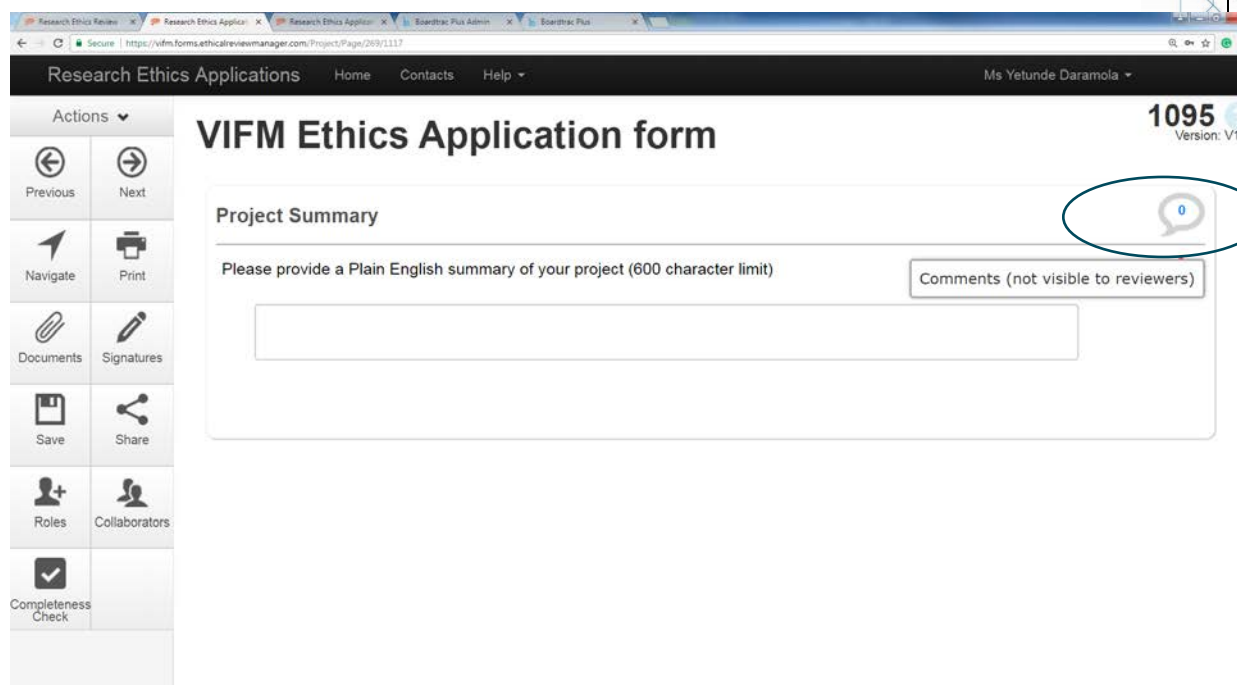
Click on the “Correspond” tile to send a message to the Research Advisory Committee.



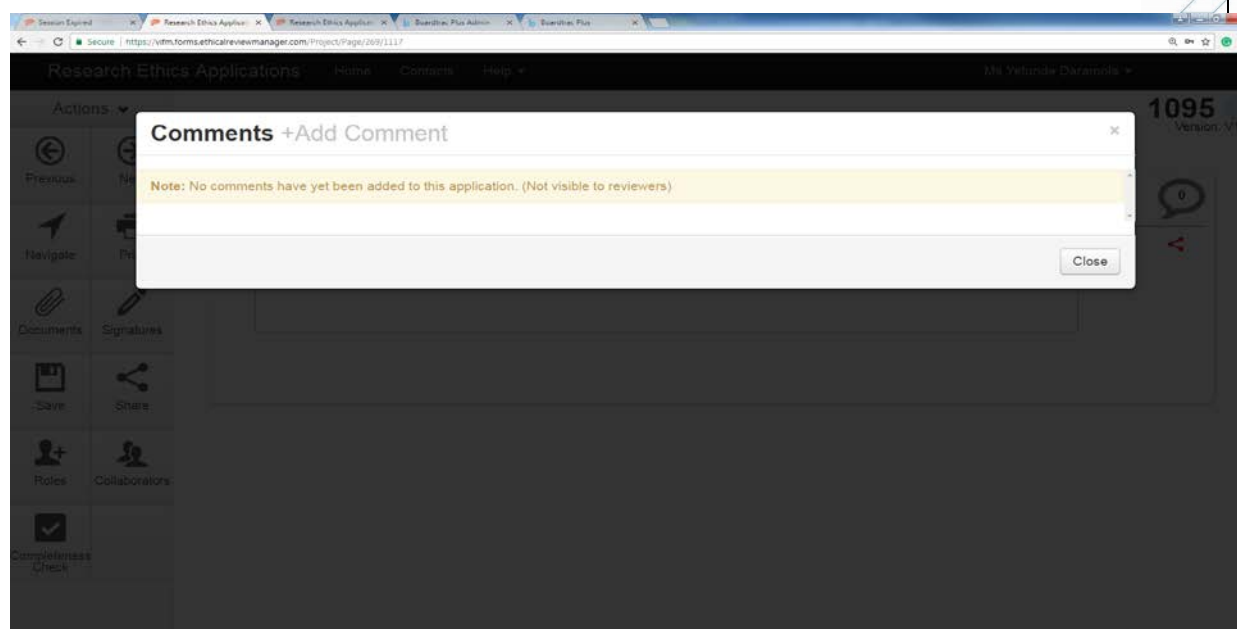


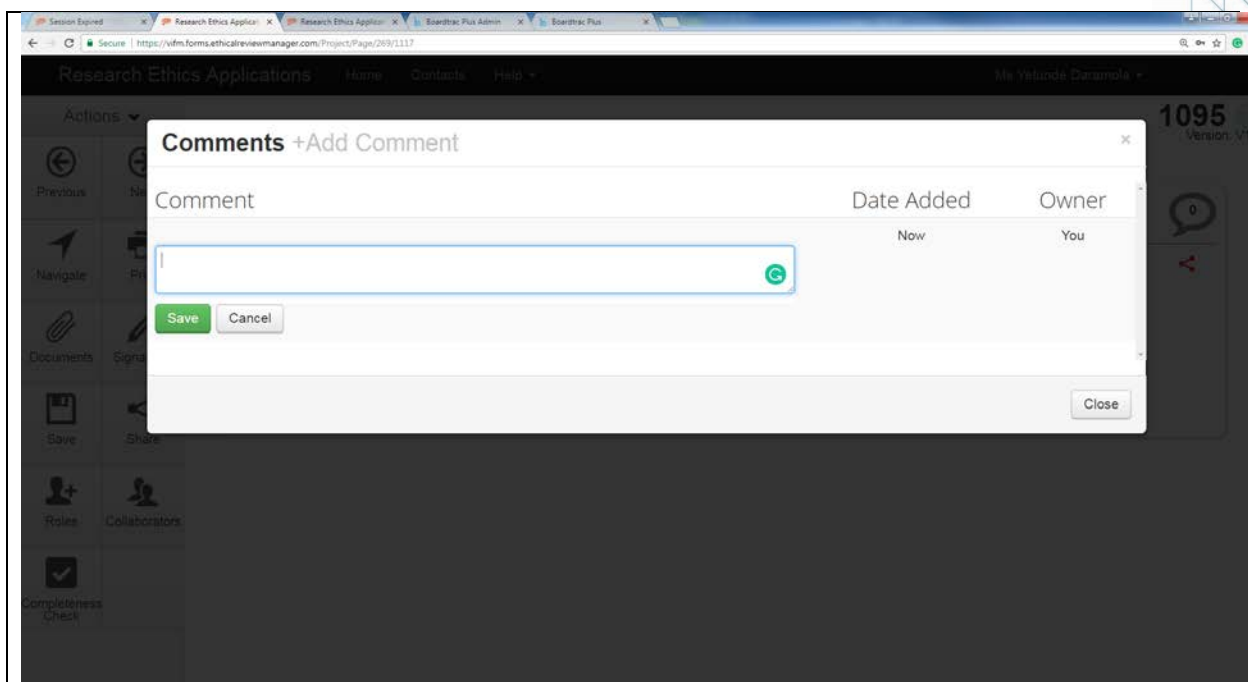
To communicate with your collaborators, click on the speech bubble in the application form and insert your message. Please note that these comments are not visible to reviewers.

It is recommended that the form owner seek comments from collaborators by using the comment speech bubble. This is because if you grant “write” access to all of the collaborators, there is the possibility that a collaborator’s comment will not be saved, if two people are writing at the same time. The last person to save the changes, overwrites any changes being made by a collaborator who is editing at the same time.



Clicking on the speech bubble take you to the next screen where you can add comment.





The screenshot shows a web browser window with the URL <https://vfm.ethicalreviewmanager.com/Project/209/1117>. The page title is "Research Ethics Applications". A modal window titled "Comments +Add Comment" is open, displaying a form with the following fields:

Comment	Date Added	Owner
<input type="text"/>	Now	You

Below the form are "Save" and "Cancel" buttons. A "Close" button is located at the bottom right of the modal. The background interface includes a sidebar with icons for "Previous", "Navigate", "Documents", "Save", "Roles", "Collaborators", and "Completeness Check". The top right corner shows "Me Yalında Durumda" and a version number "1095".

Type in your comment, click save and close when you have finished.

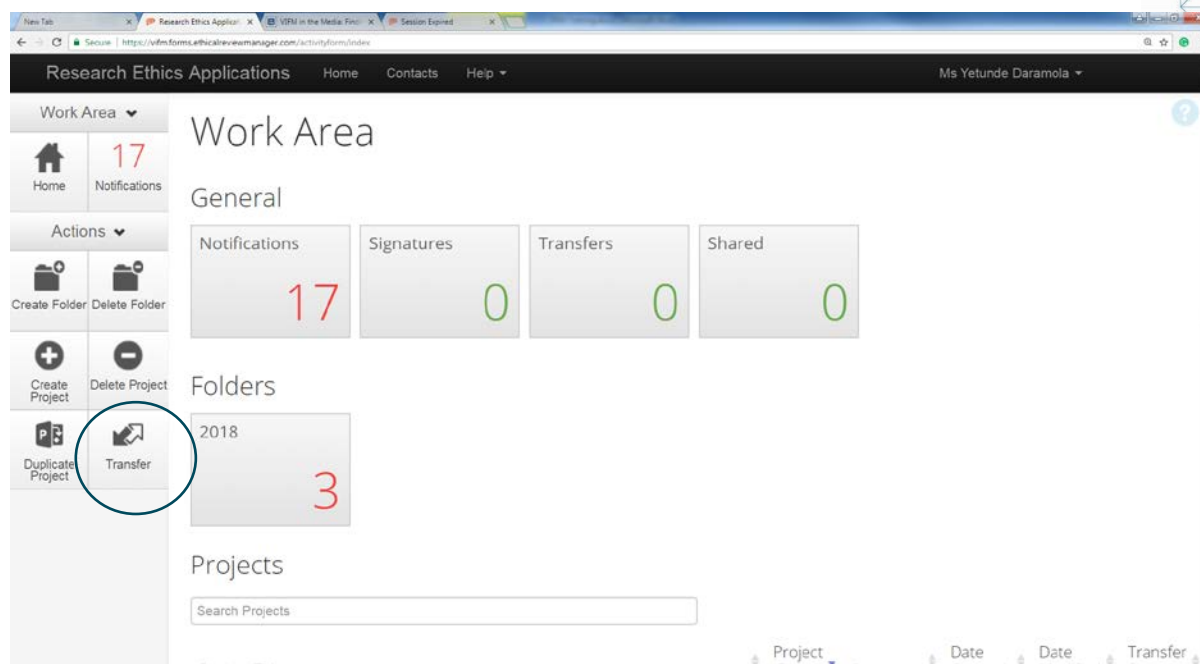
## 9. How to print an application form

To print a form, simply click on the “Print” tile located on the side navigation bar. You will be redirected to the browsers print options where you must specify the formatting and click Print.



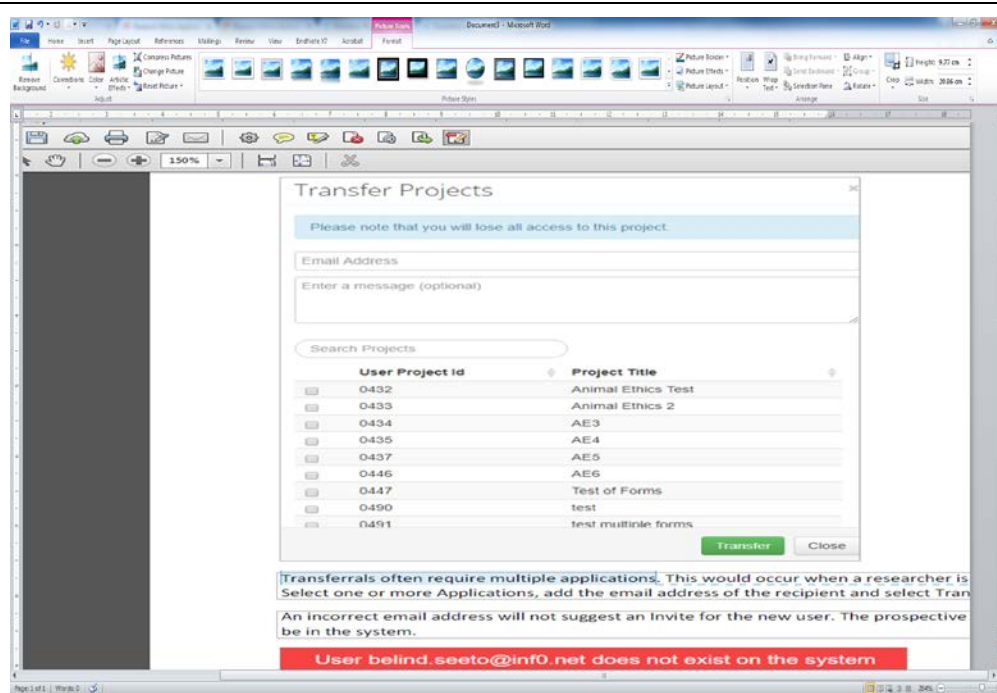
## 10. How to transfer ownership of an application to another person.

If you are no longer involved in a research project you can transfer the ownership of that form to another person by clicking on the “Transfer” tile.



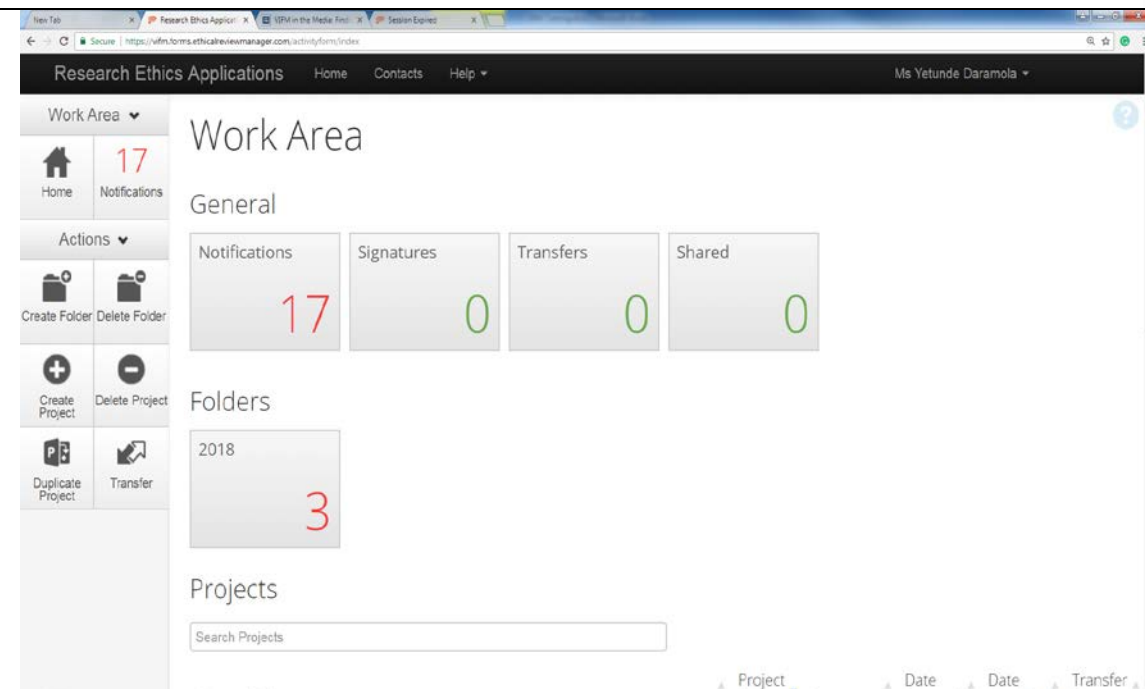
This will take you to the next screen.

Select the project which you intend to transfer and enter the email address and message to the prospective owner of the project. The prospective owner needs to be registered on the ERM system in order for the project to be transferred to him or her.

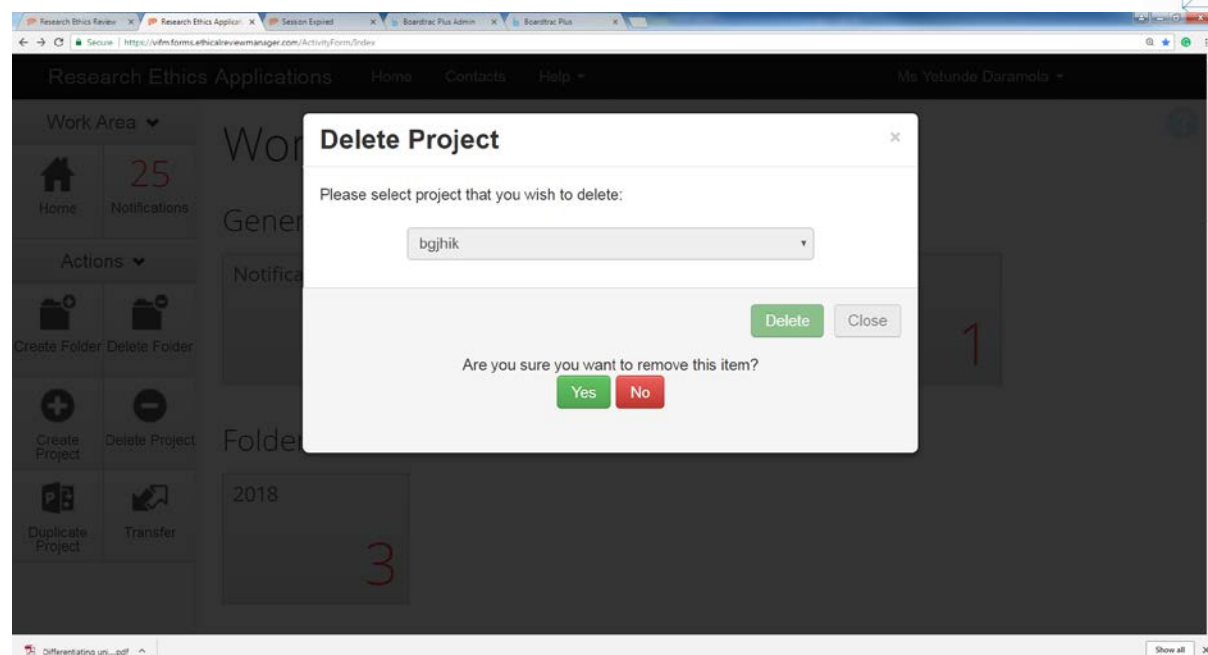


## 11. How to delete an application form

To delete a project, click on the “Delete Project” tile in the side navigation bar.



Then select the project you wish to delete from the dropdown menu. Click the Delete button.





## 12. How to submit a sub-form

There are a number of sub-forms in the ERM system for researchers to use. These are the Annual Report, Final Report, Amendment to an Approved Project and Publication Approval form.

To access these forms, click on the “Create Sub-form” tile in the side navigation bar.



Select the sub-form that you need from the drop down menu – see below. This will open the form so that you can complete it and submit.

