VICTORIAN INSTITUTE OF FORENSIC MEDICINE

ETHICAL REVIEW MANAGER (ERM)

Submitting an online research application: A Guide for Researchers.

12 November 2018 ***Version 2***

VICTORIAN INSTITUTE OF FORENSIC MEDICINE

Contents

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

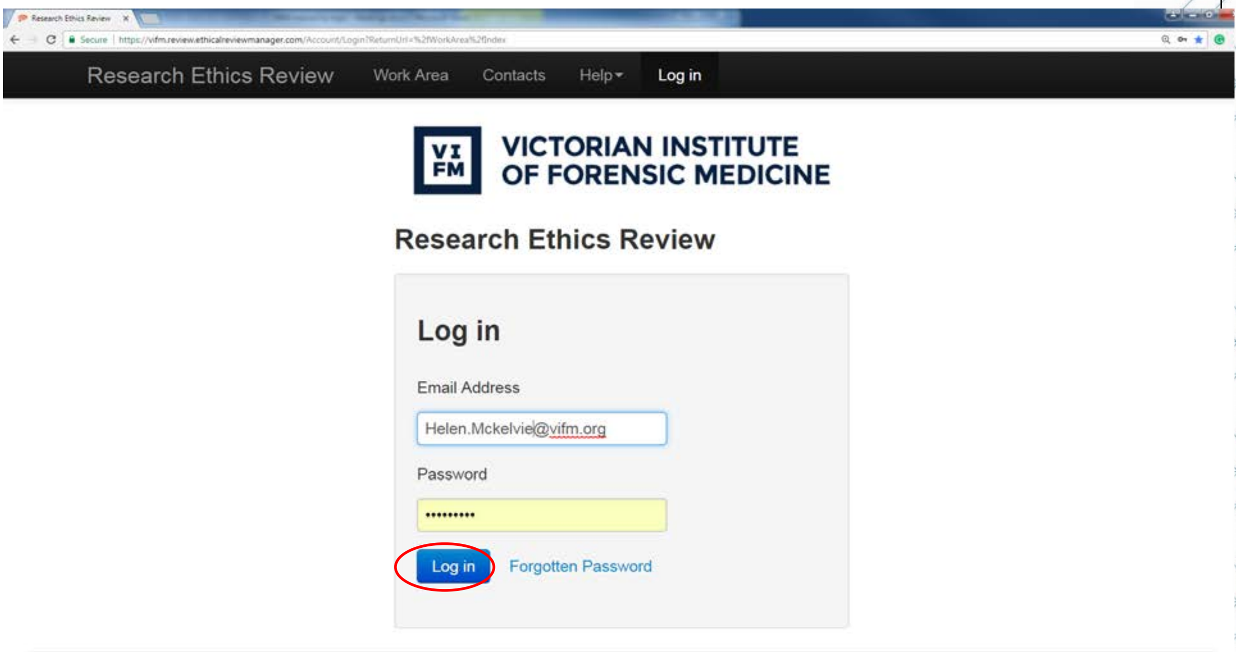
This is a step-by-step guide for the submission of a new research application to the Research Advisory Committee and the VIFM Ethics Committee.

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.

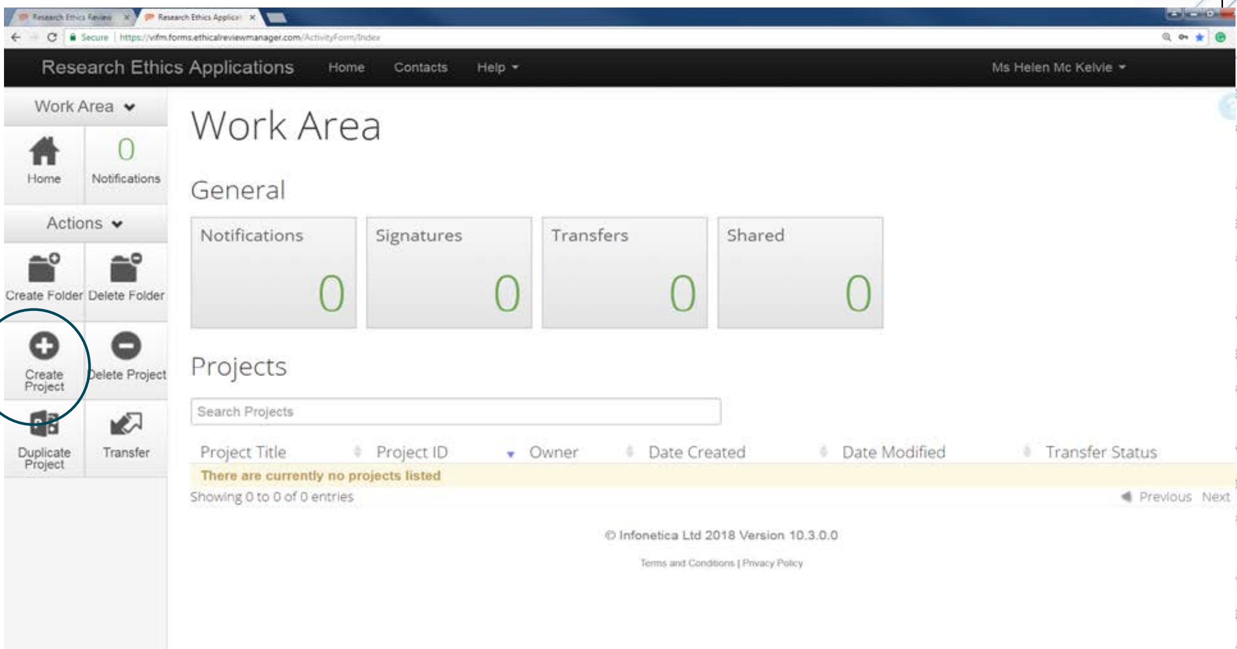
https://vifm.forms.ethicalreviewmanager.com/Account/Login

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

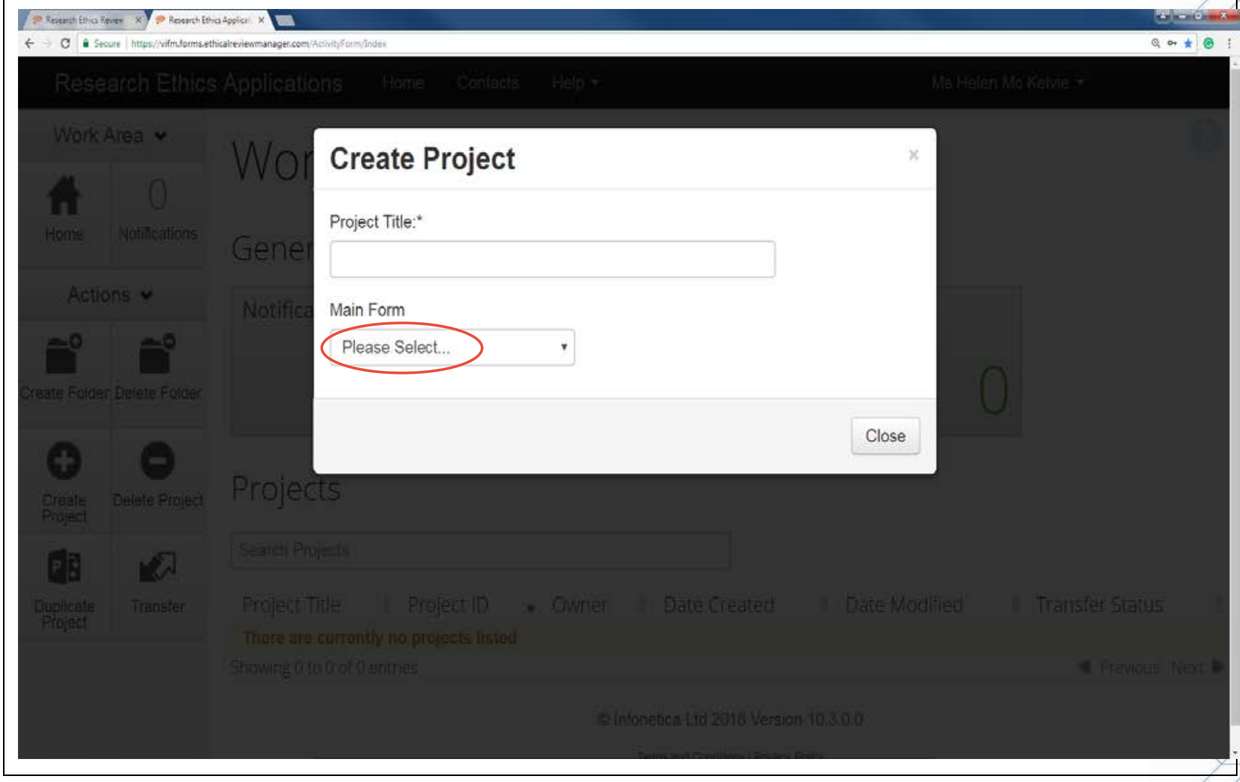


2. Creating a new application

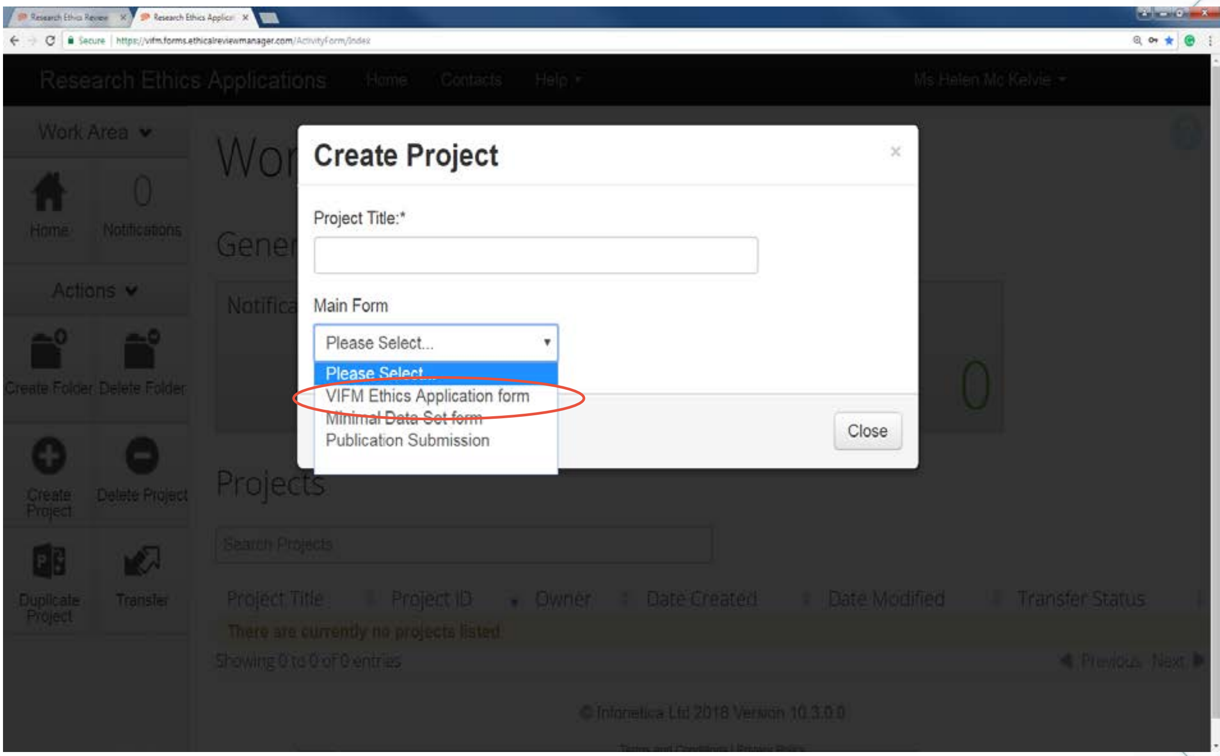
When you have logged into the ERM, you will see your work area which looks like this screen. To start an application, click on the “Create Project” tile on the side navigation bar.



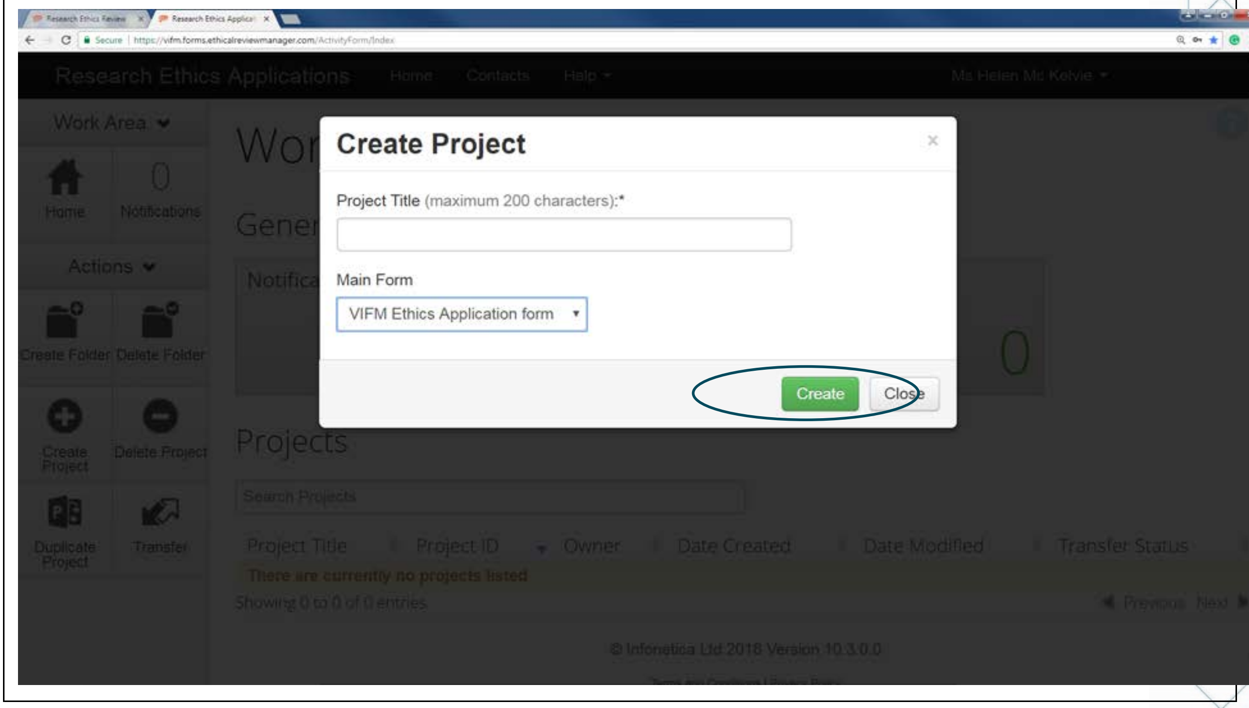
This will take you to the next screen. Click on “Please select” to reveal a drop-down menu of forms.



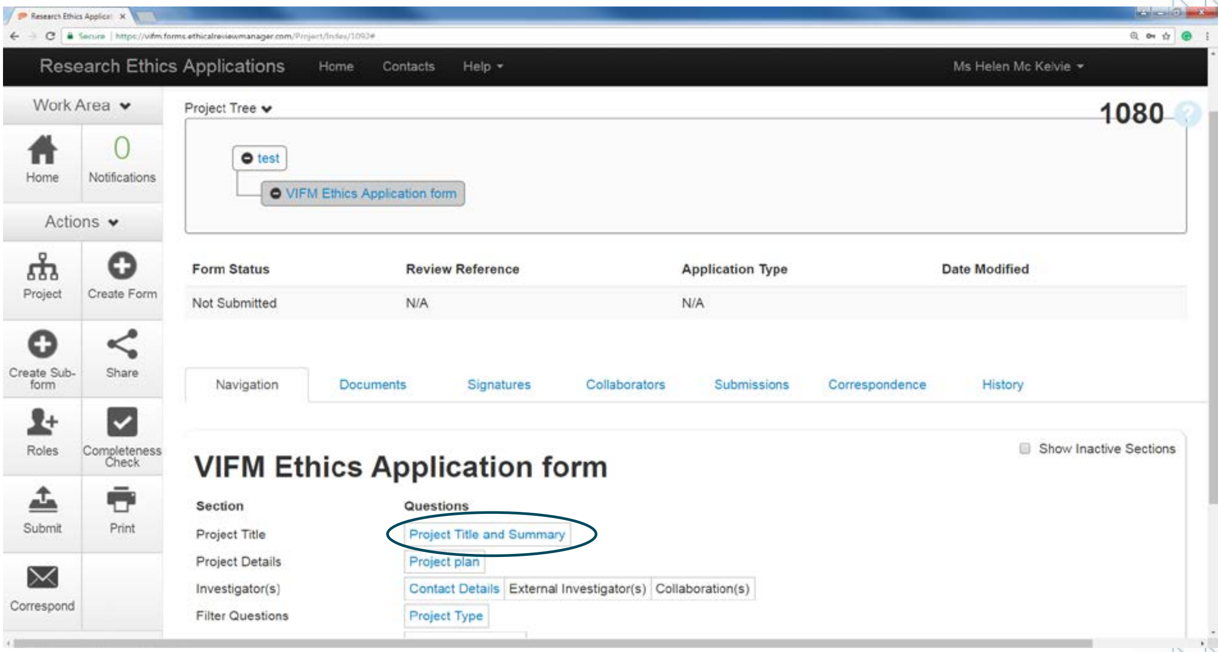
Select the “VIFM Ethics Application form” to create a new research application.



Enter the Project Title and click on “Create”.

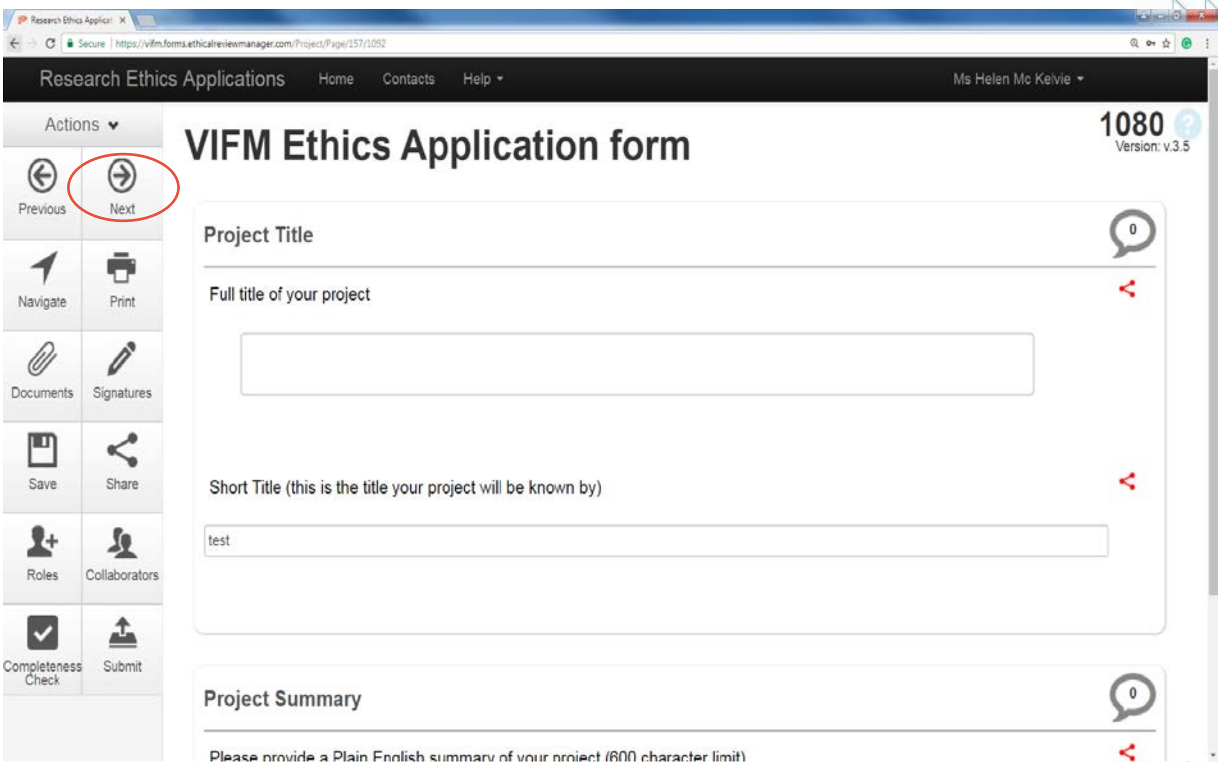


Click on “Project Title and Summary” to begin filling out the form.



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.



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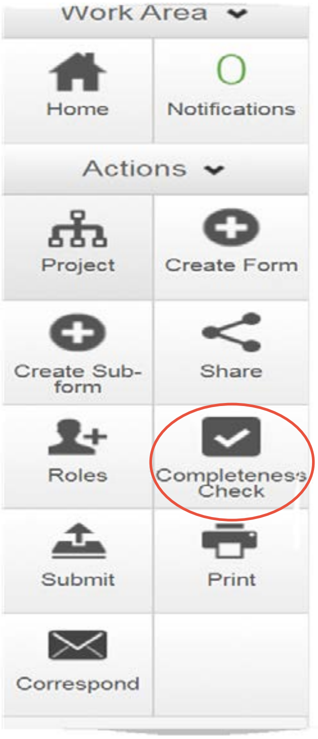
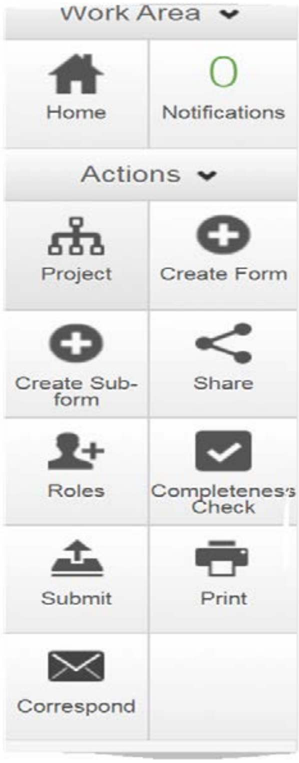
To check that you have completed the application form, click on “Completeness Check” to identify any incomplete sections. You will need to complete these sections before you can submit the form.



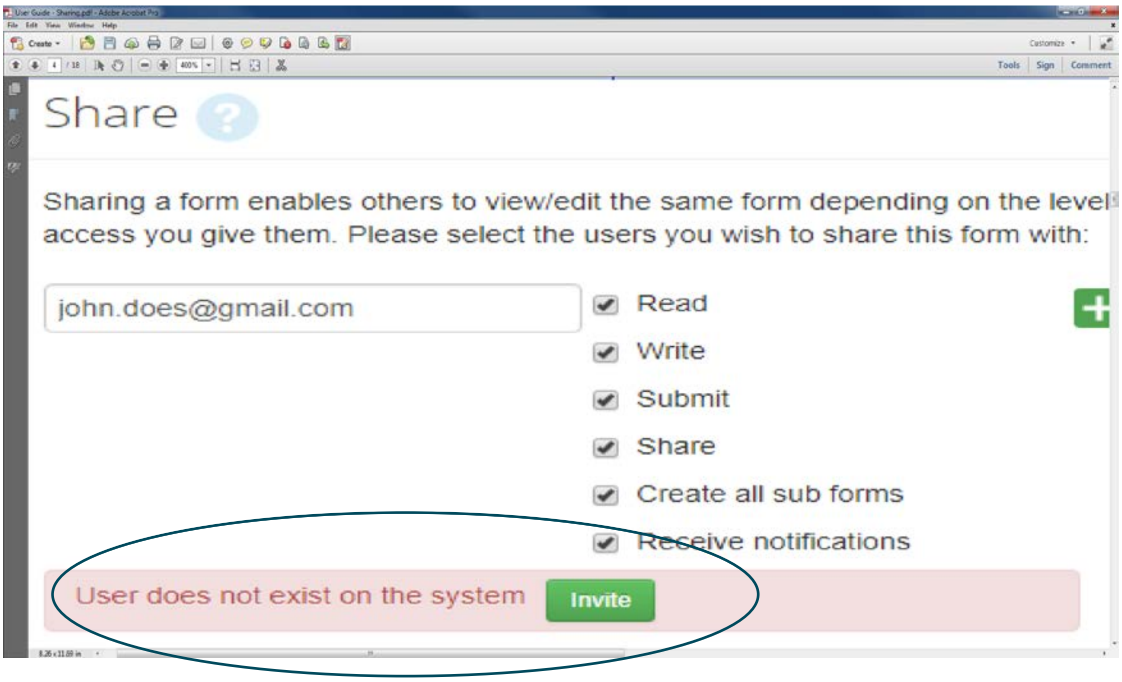
3. How to share your application form with others

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.

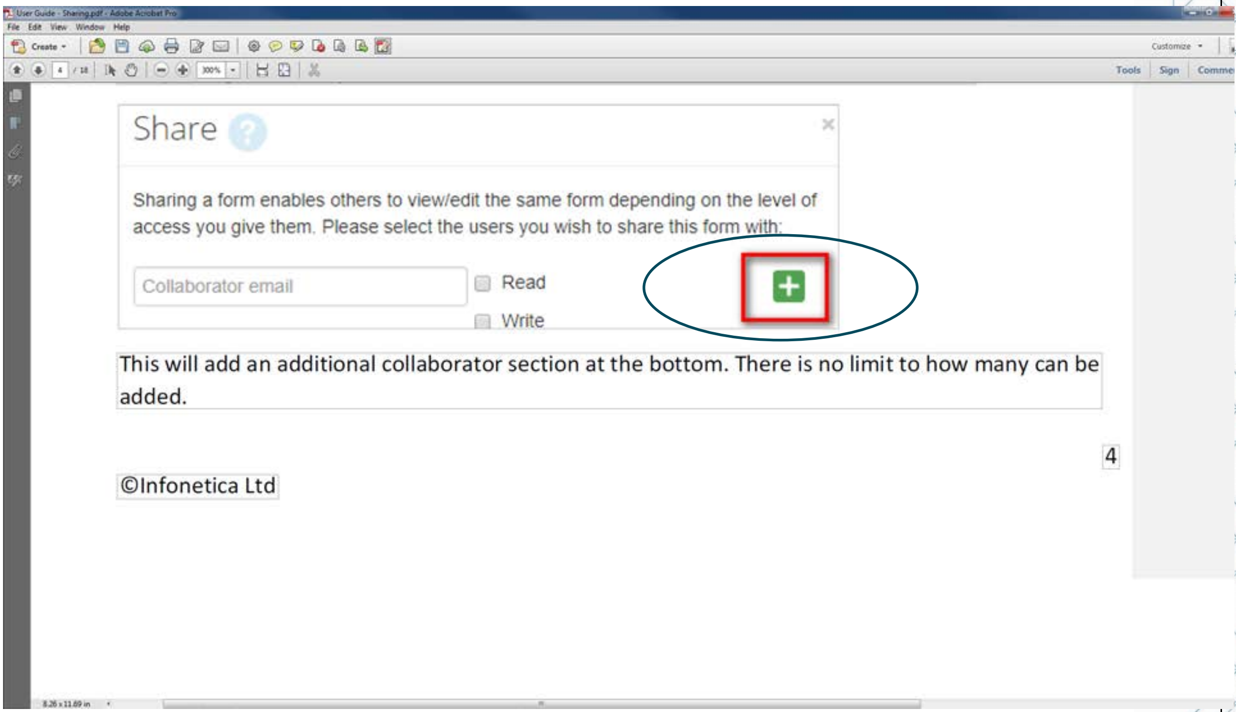


There are two ways you can select people to share the application with. You can enter the email address of the person you wish to share your form with.

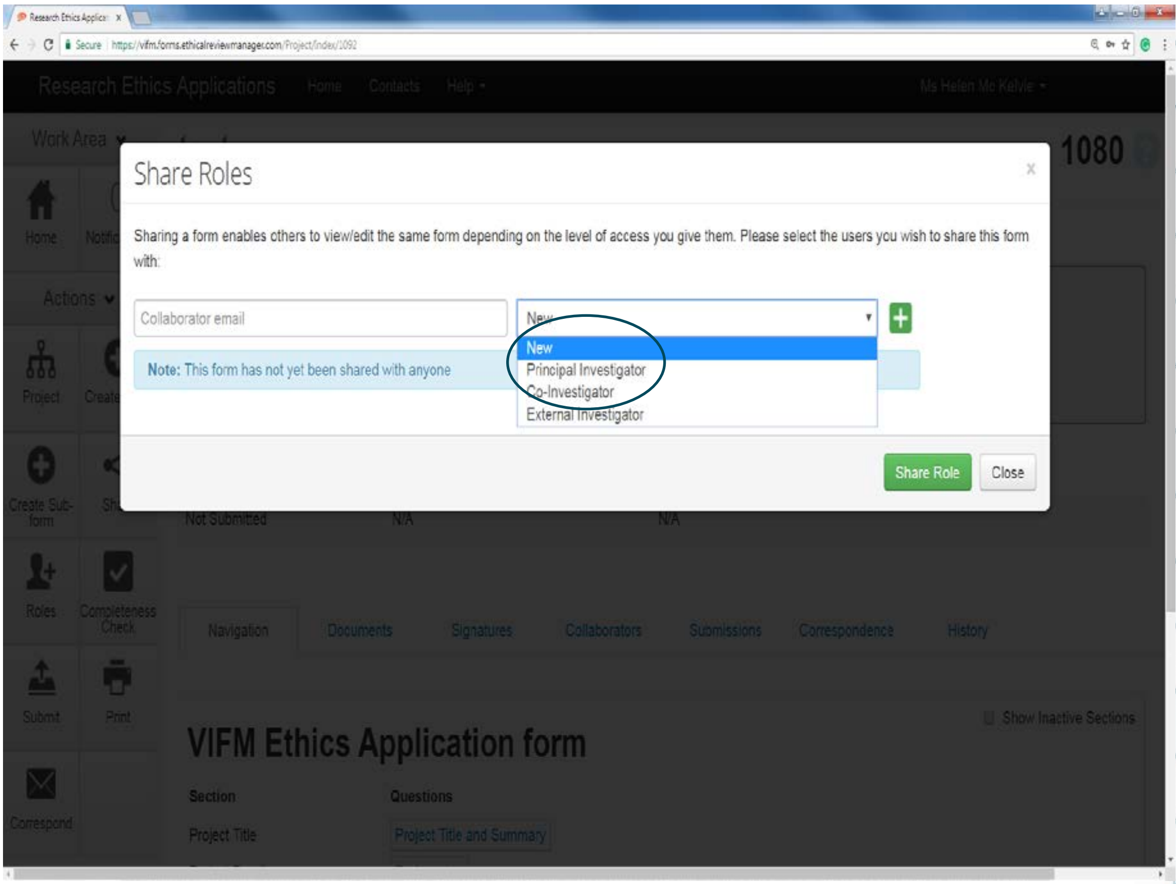
If you insert an email address for a person who has not been registered on the ERM, a warning will be displayed with an option to invite the co-investigator to join the ERM – see below. You will need to click on the “invite” button to send the person you wish to share the form with an invitation to register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



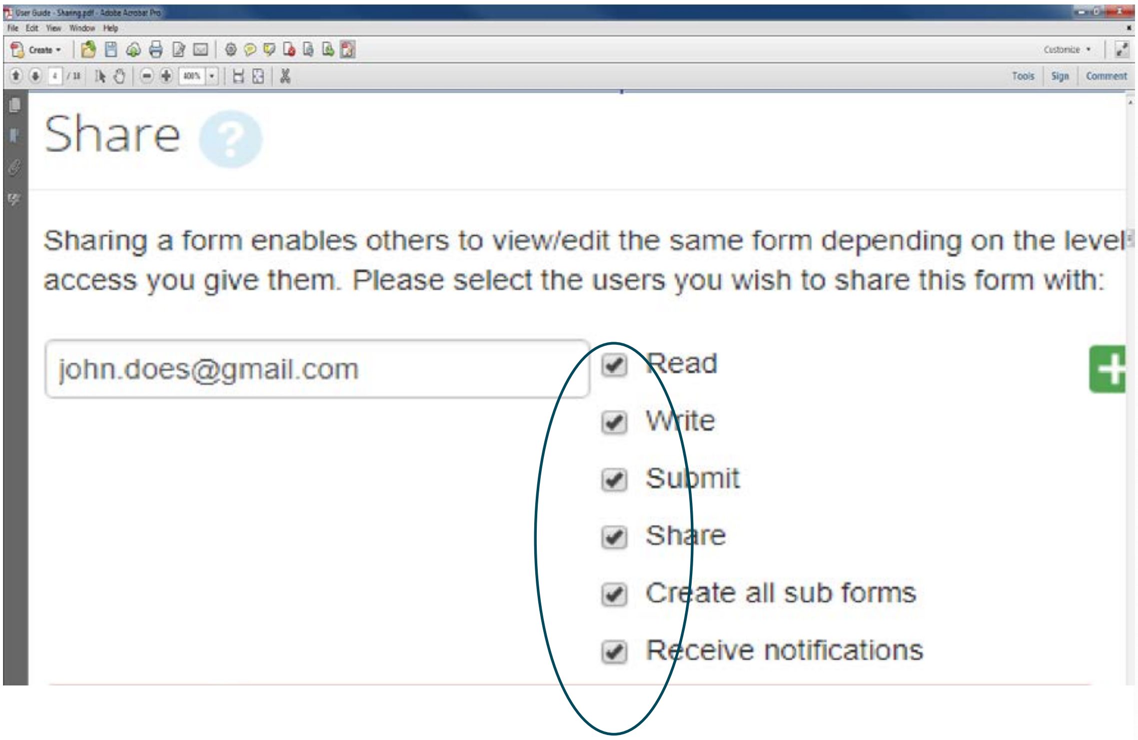
If the person with whom you wish to share the form is already registered on the ERM, you can also add them as a collaborator by clicking the “plus” sign shown below. Please note that all collaborators are added individually. This allows the permissions to be set individually.



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

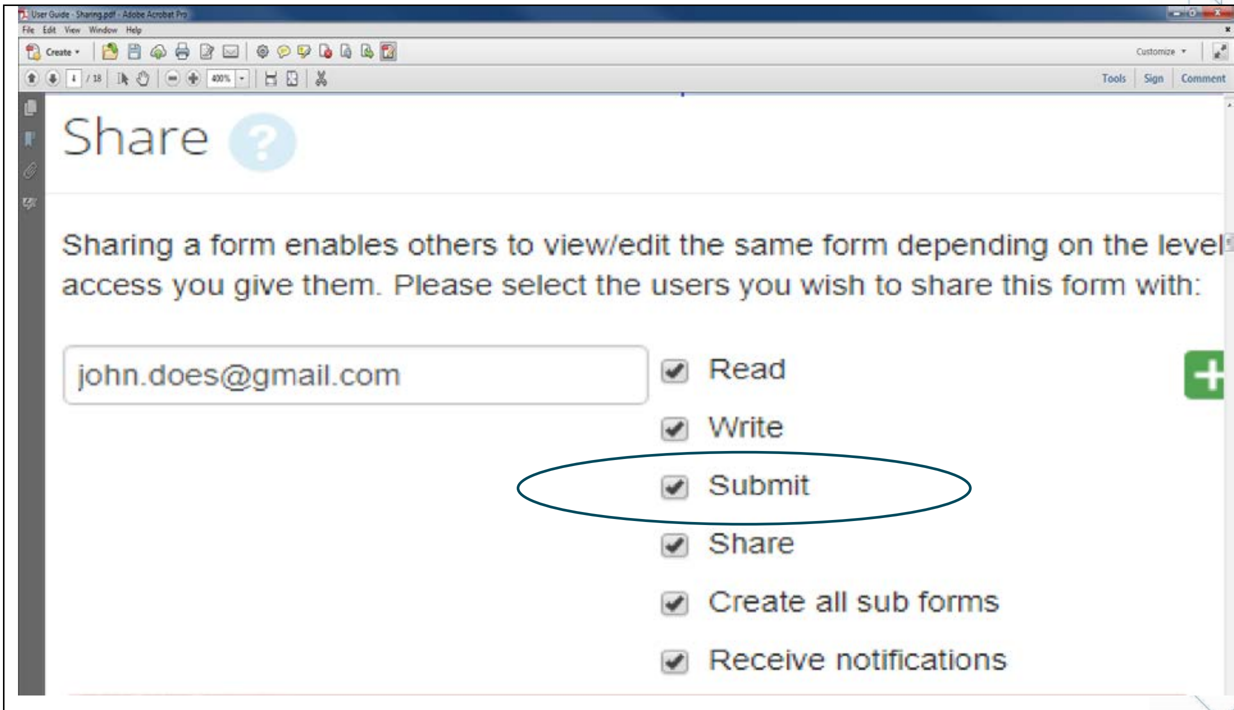


You can set the level of access that a collaborator has by ticking the boxes in the Share screen shown below. "Read" only access will only allow the collaborator to read the form. "Read and Write" access allows the collaborator to read and edit the form. Full access allows the collaborator to read, write,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

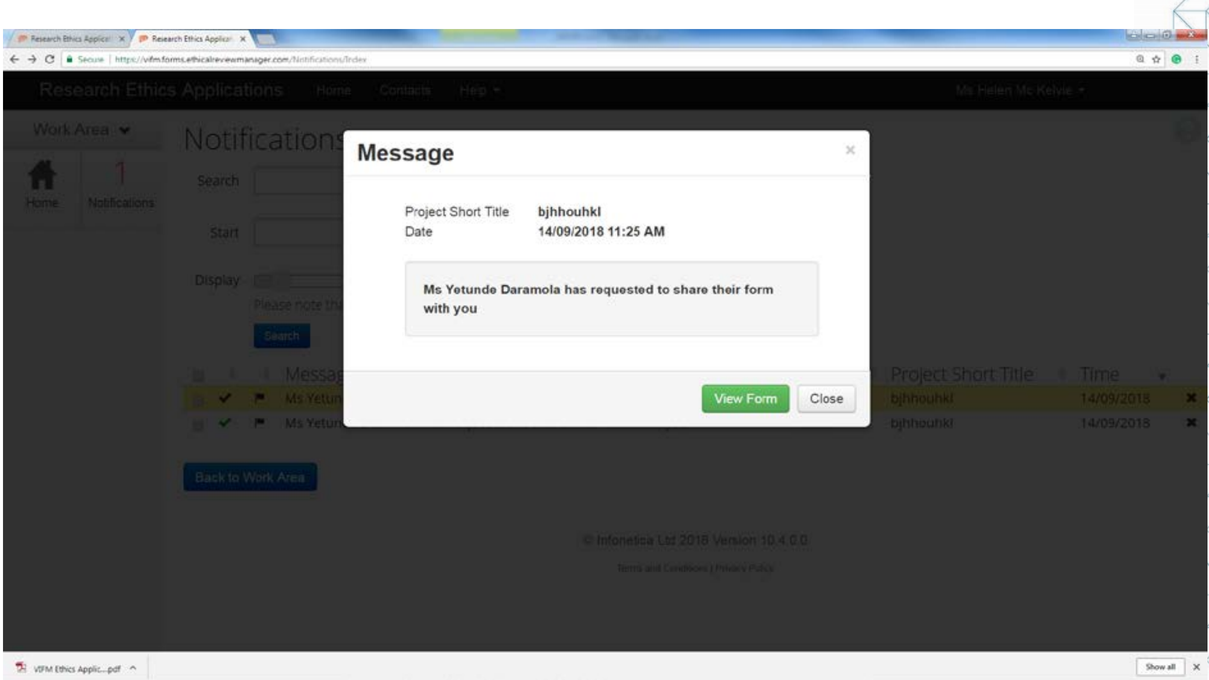


If the application is shared as "Write" it is possible that two or more collaborators will be editing the same panel. A warning will be displayed, but note that the application changes will be saved by whoever saves them last. It is advised that you restrict the "write" access to the key investigators,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

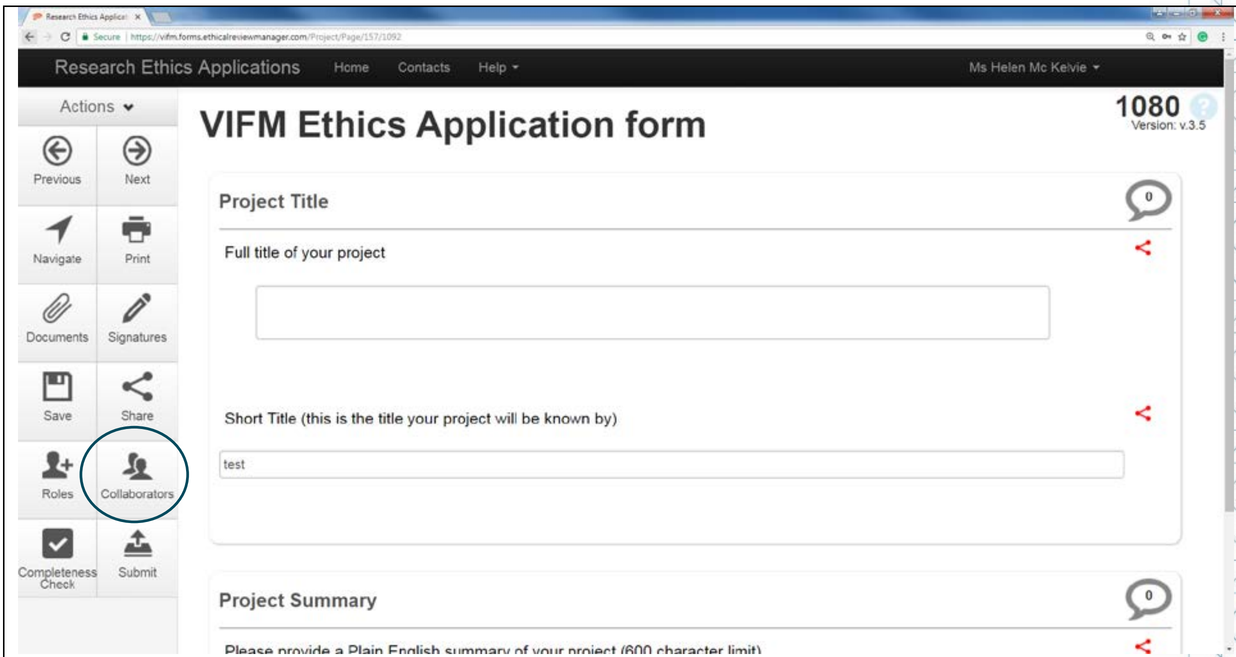
If you have prepared the application form as a co-investigator, and would like the principal investigator to submit the form, share it with the principal investigator and select "Submit" in the menu below.



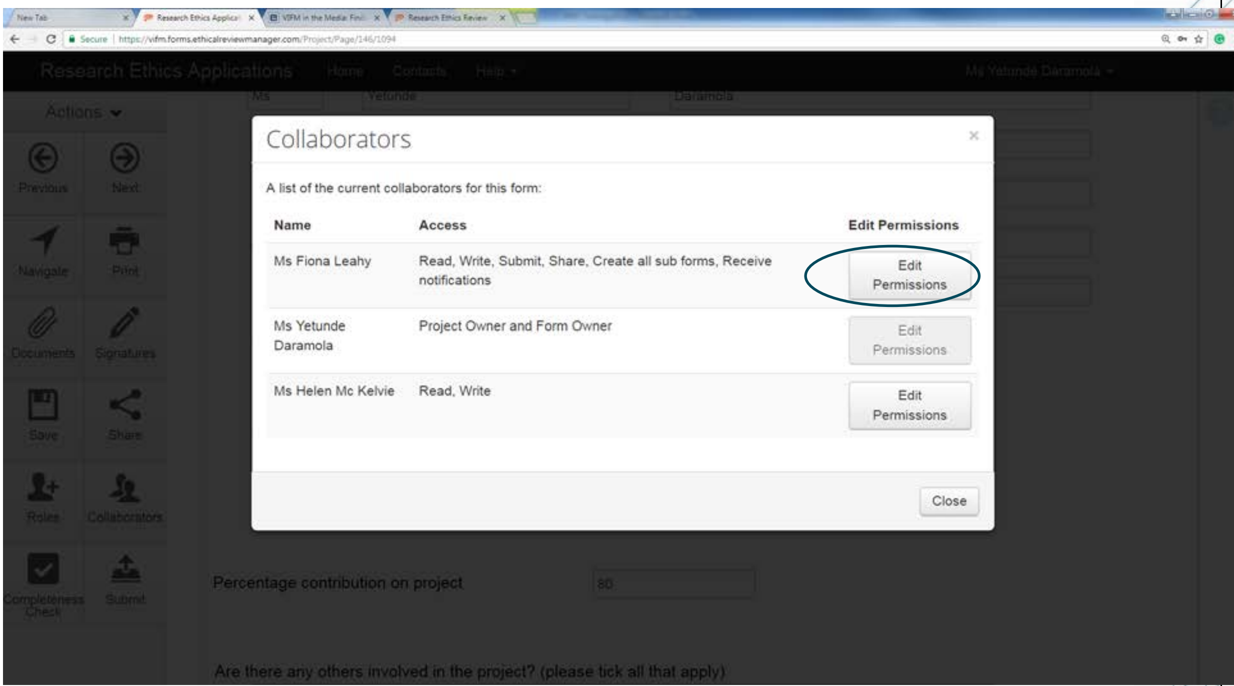
Once you have shared the application the person will receive the following message in their ERM.



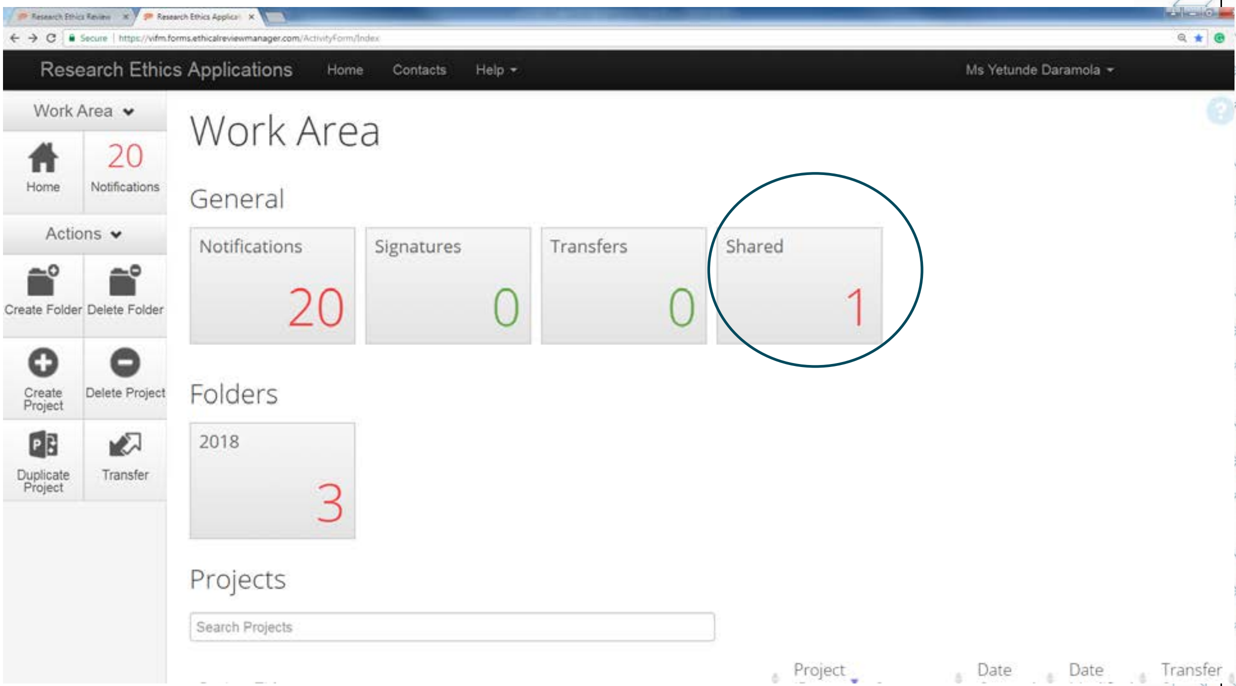
Once added, the collaborators are visible by clicking on the “Collaborators” tile.

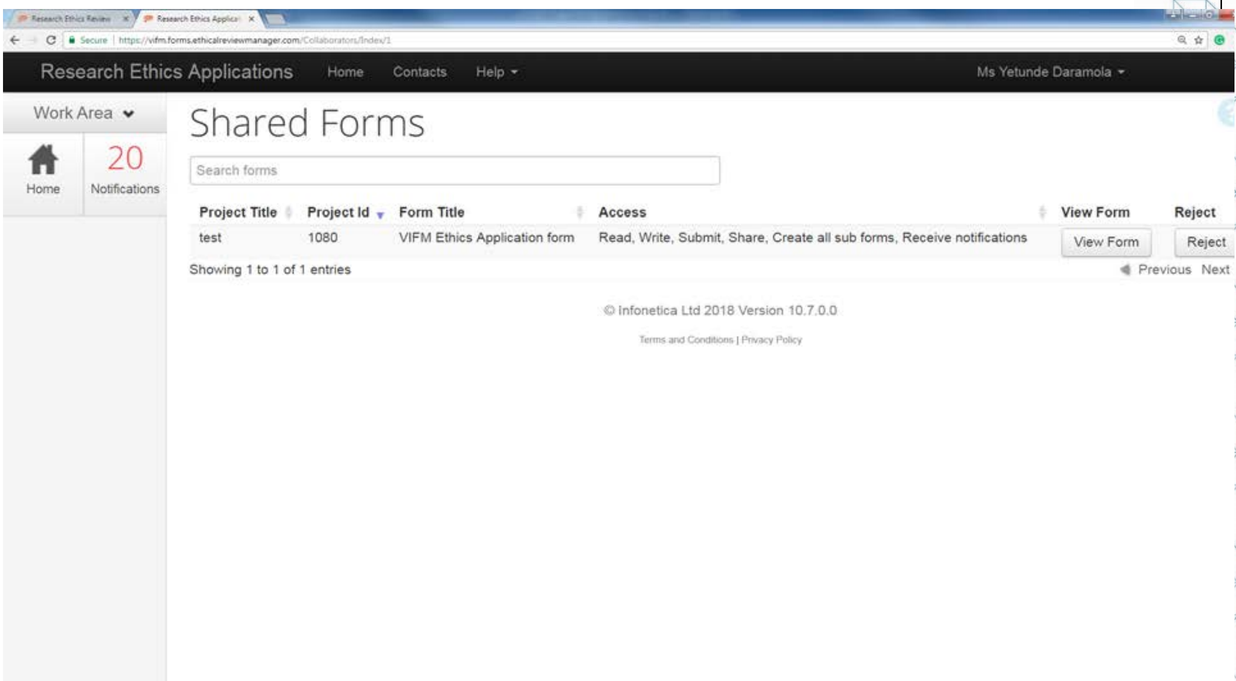


You can edit the level of access given to each collaborator by clicking on the “Edit Permissions” button.

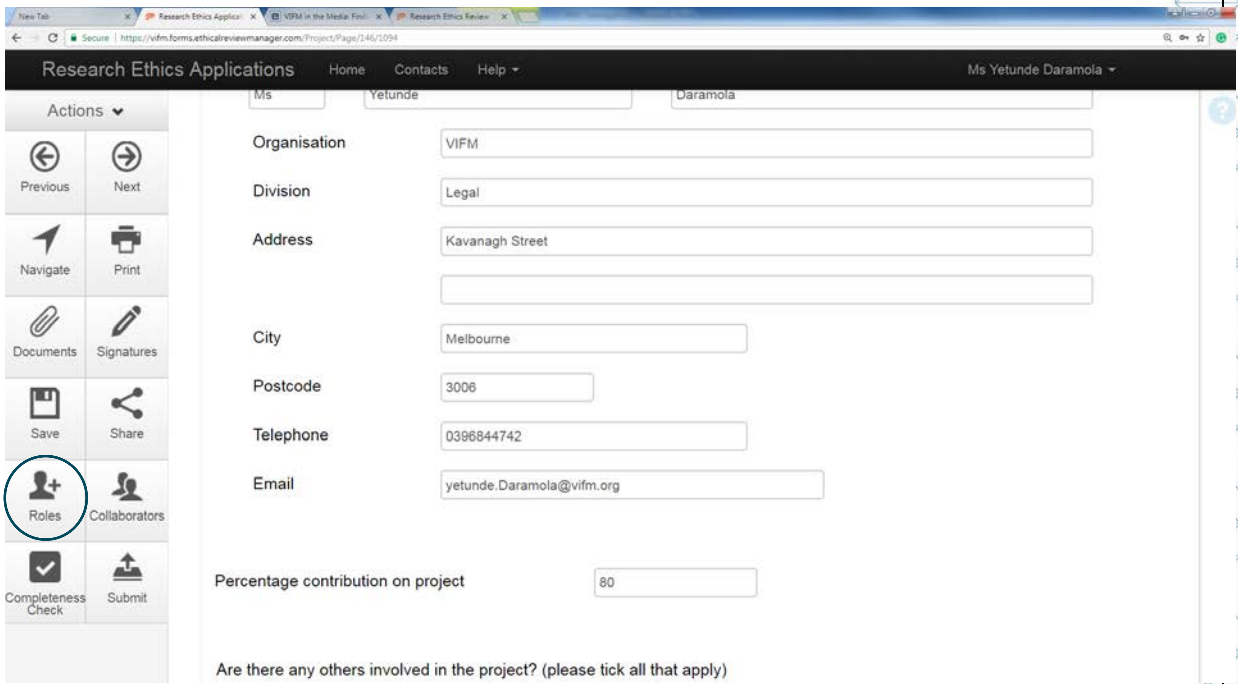


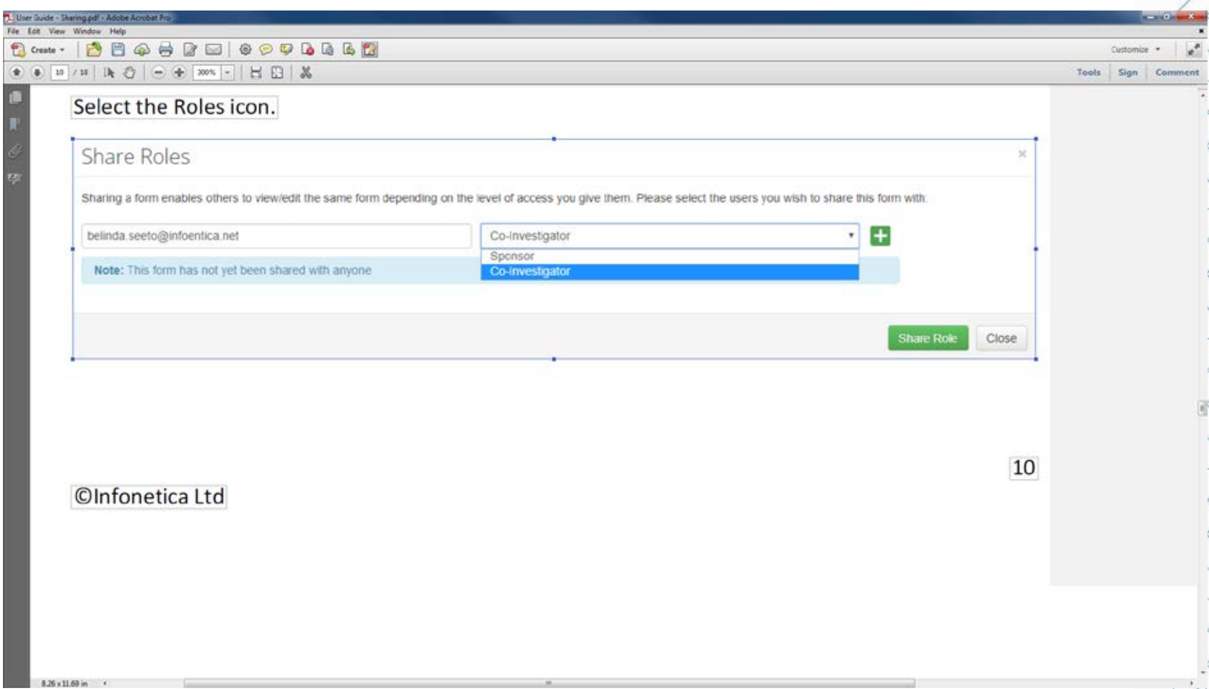
The “Share” tile will signify how many share requests you have, these can be accessed by clicking on the tile and clicking on the share table.





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.

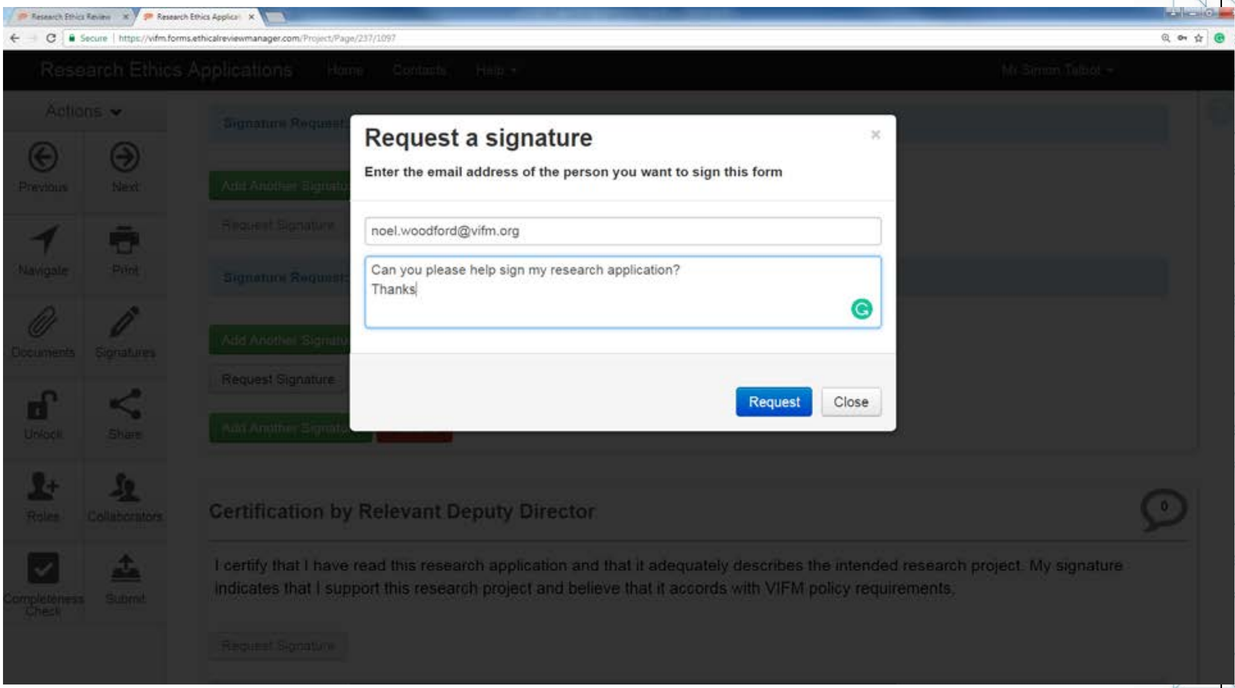




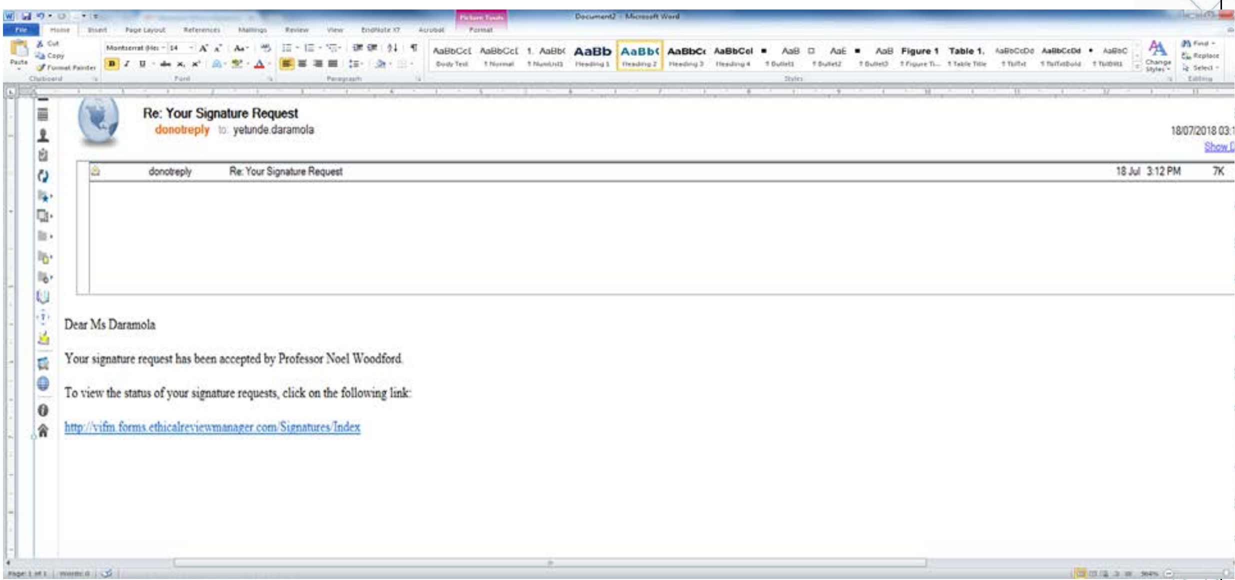
4. How to sign your application form

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

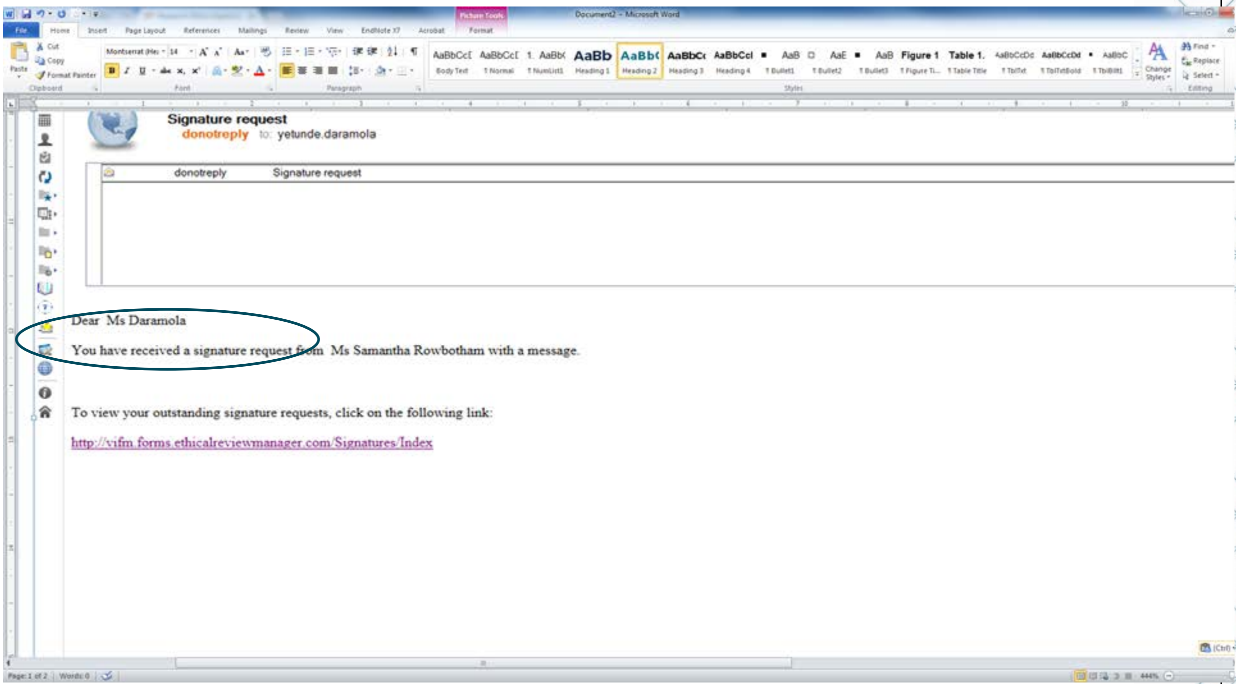
You seek the signatures of the Head of Service and Head of Institution by clicking on request signature which takes you to the screen below, then you type in in the email address and message and click on request to send your request.



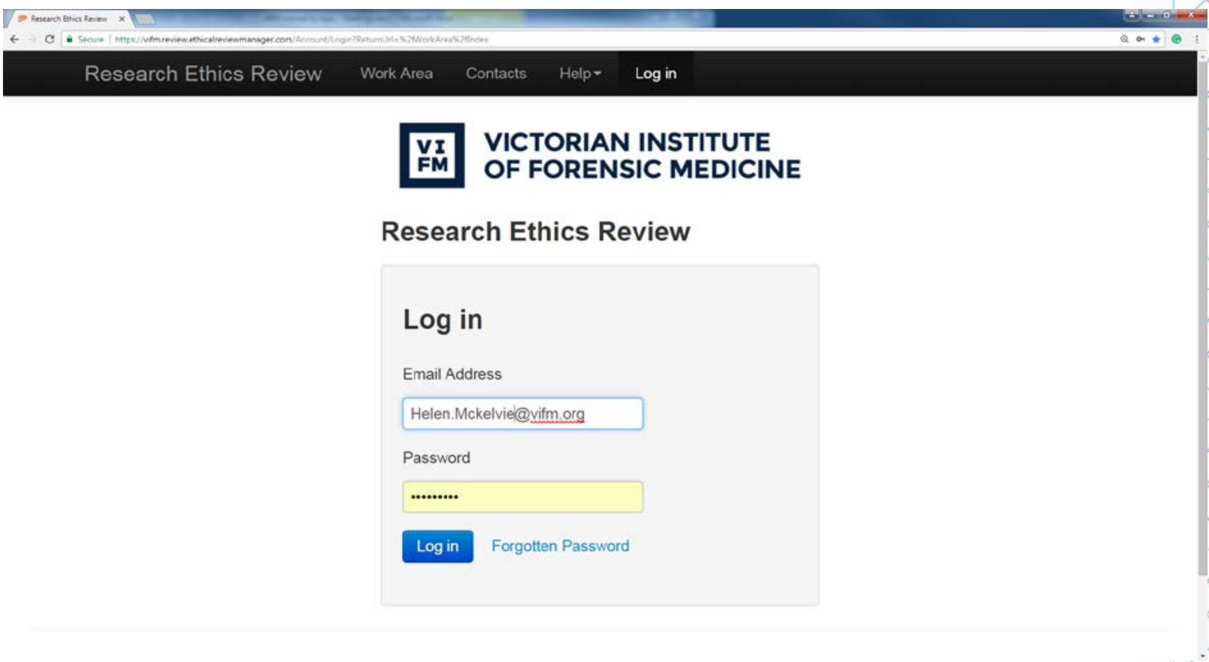
You will receive notification in your registered email when a task such as a signature request is completed.



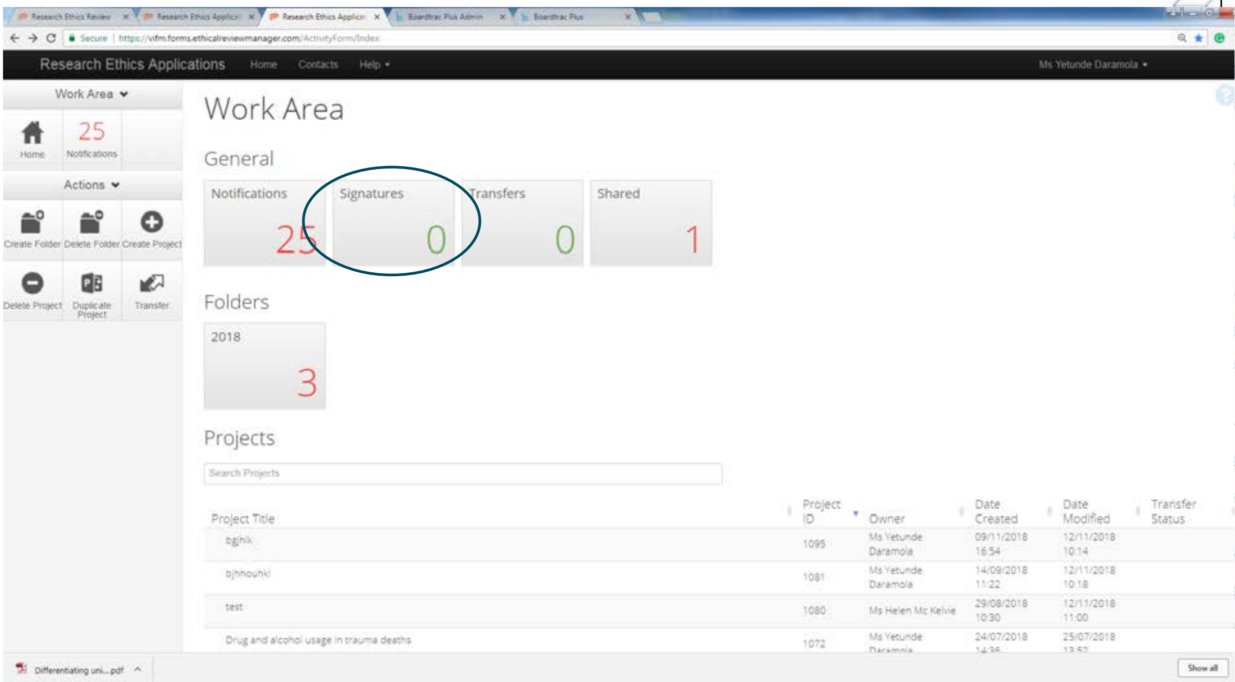
If you receive a request from a co-investigator for your signature on an application, you will receive an email as set out below. To sign a form, just click on the link in the email notifying you of the signature request.



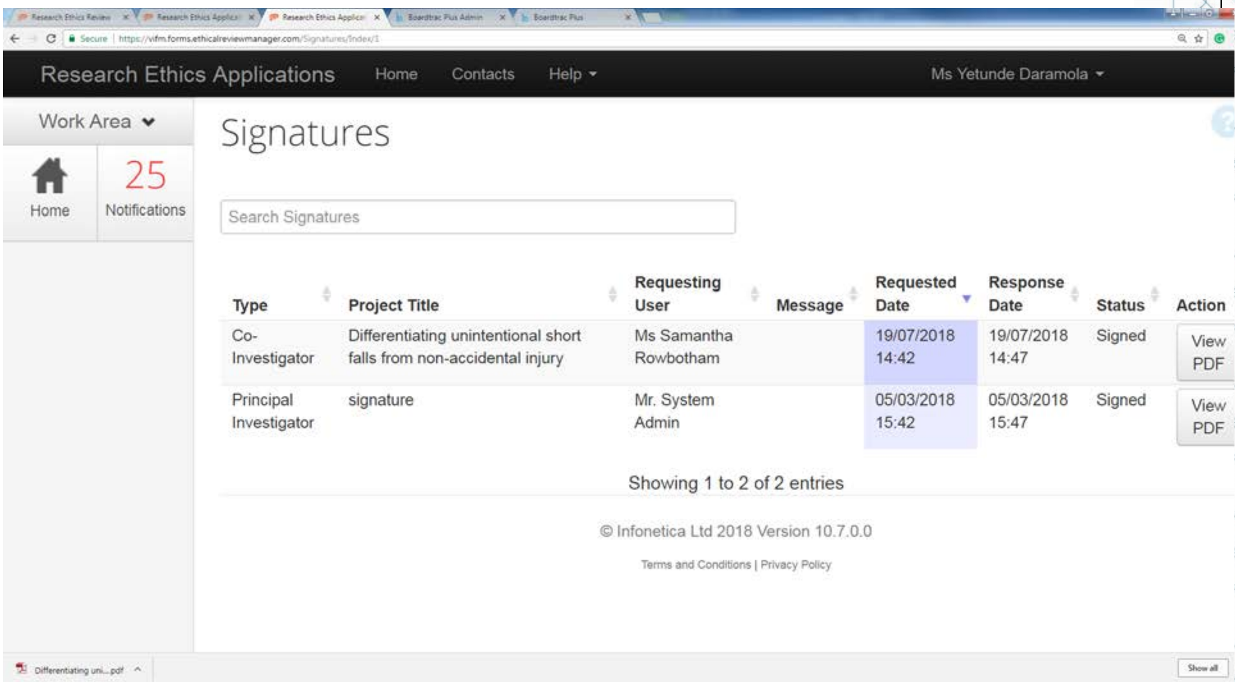
This will take you to the home page, where you log in and view the form. To sign, you need to enter your registered email address and click "Sign". You will not be able to sign a form if you do not view it or if you are not a registered user.



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

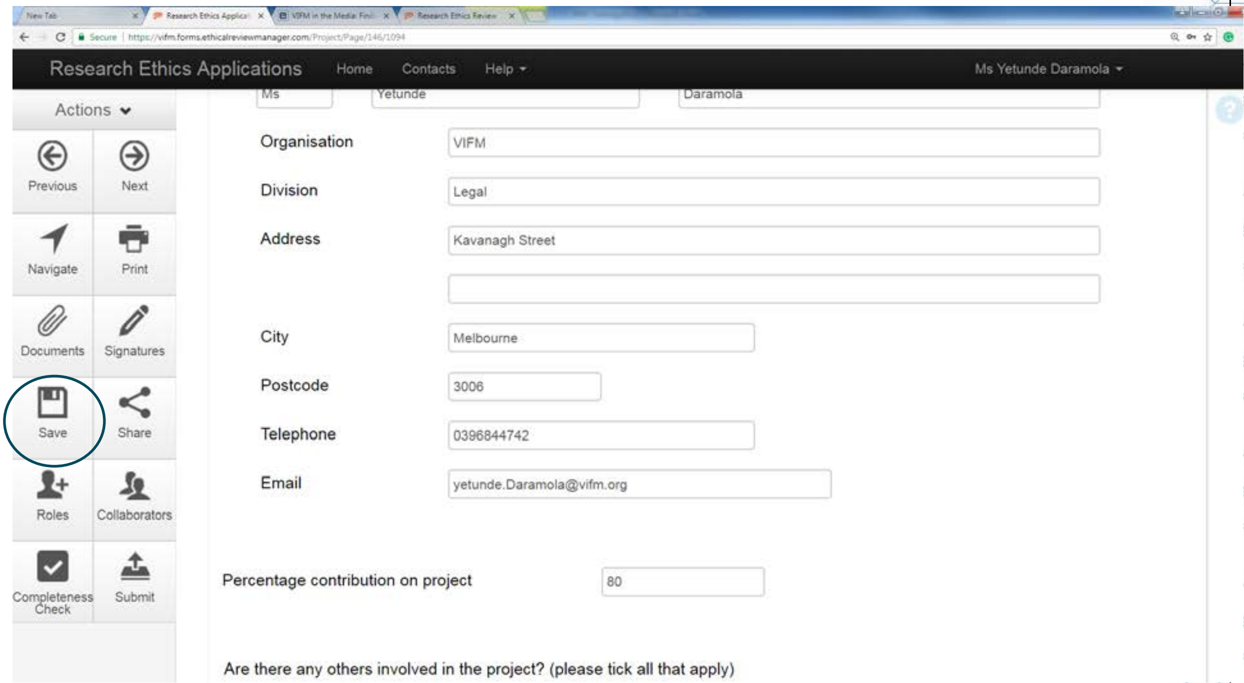


A box will appear displaying both the signatures that are on the form along with the requested signatures yet to be completed – see screen below.

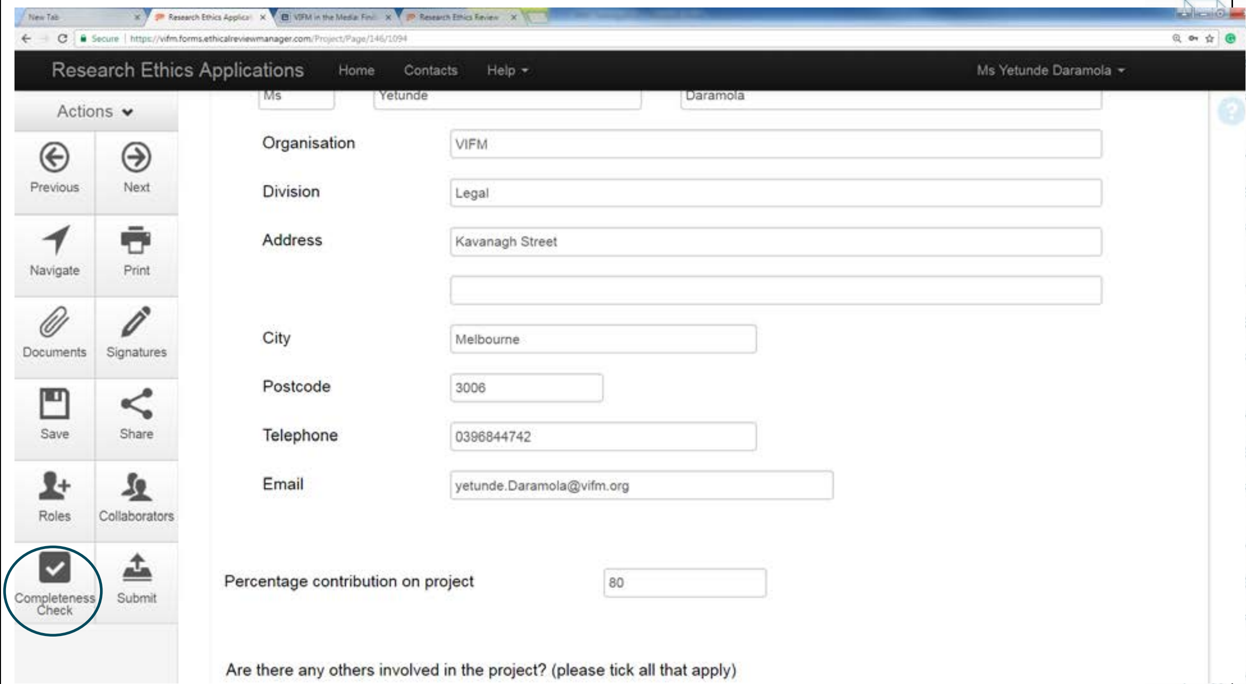


5. How to save and submit your application form

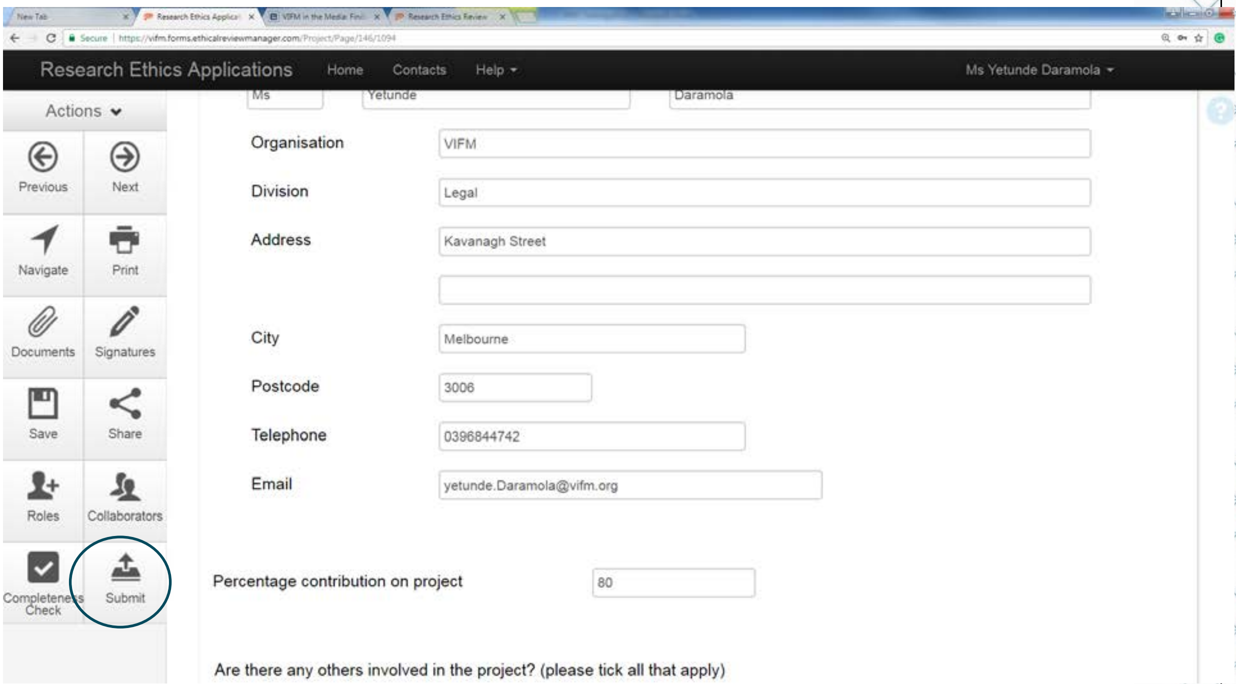
To save changes to the form simply click the “Save” tile located on the side navigation bar.



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.

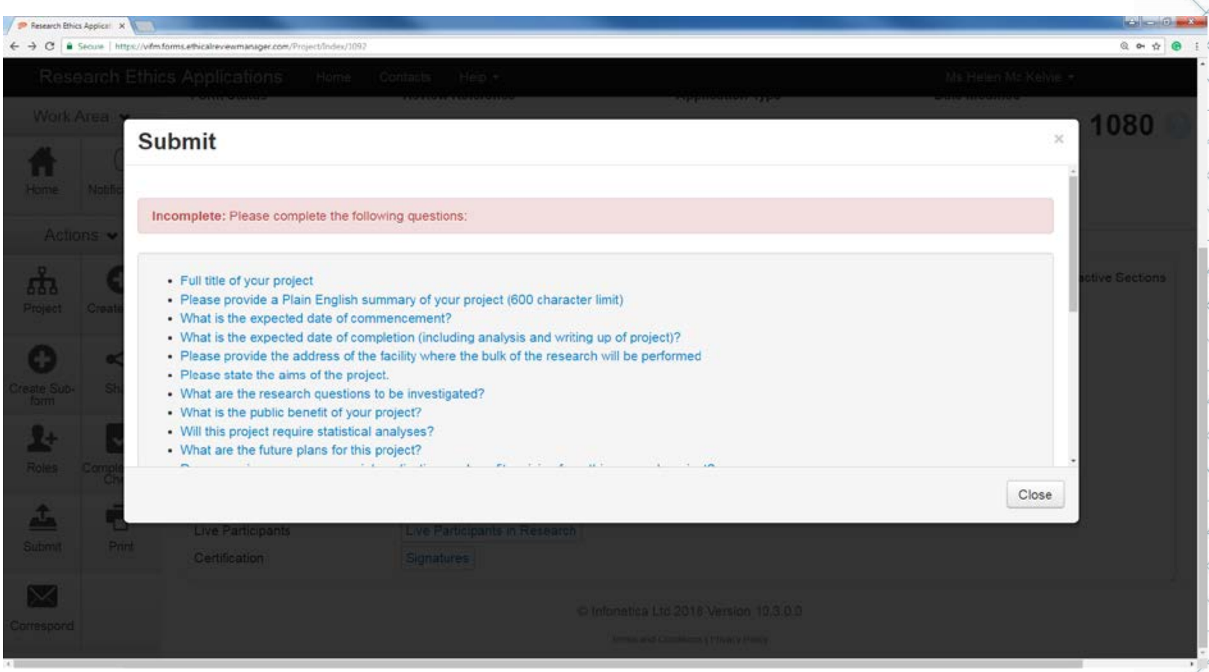


Once the form has been completed, click on the “Submit” tile in the side navigation bar.



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.

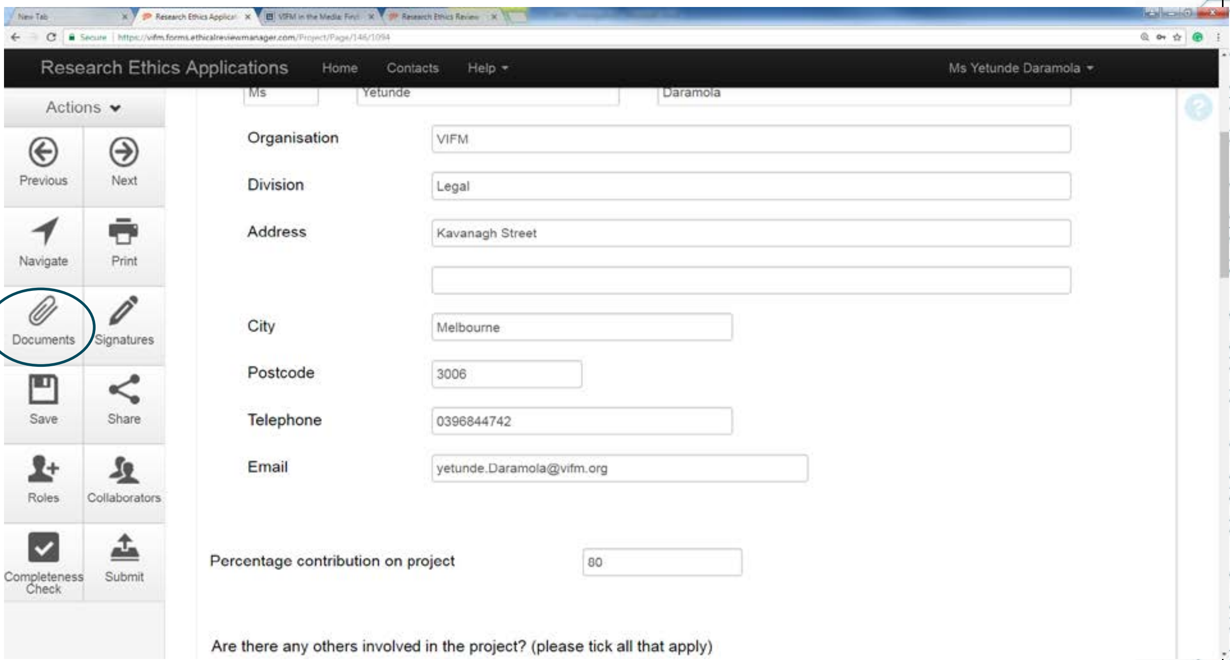
If all the sections have not been completed, you will get the following message and you will not be able to submit your form. A list of all incomplete items will be displayed in a box. You can click on each item to take you to the question that needs to be completed.



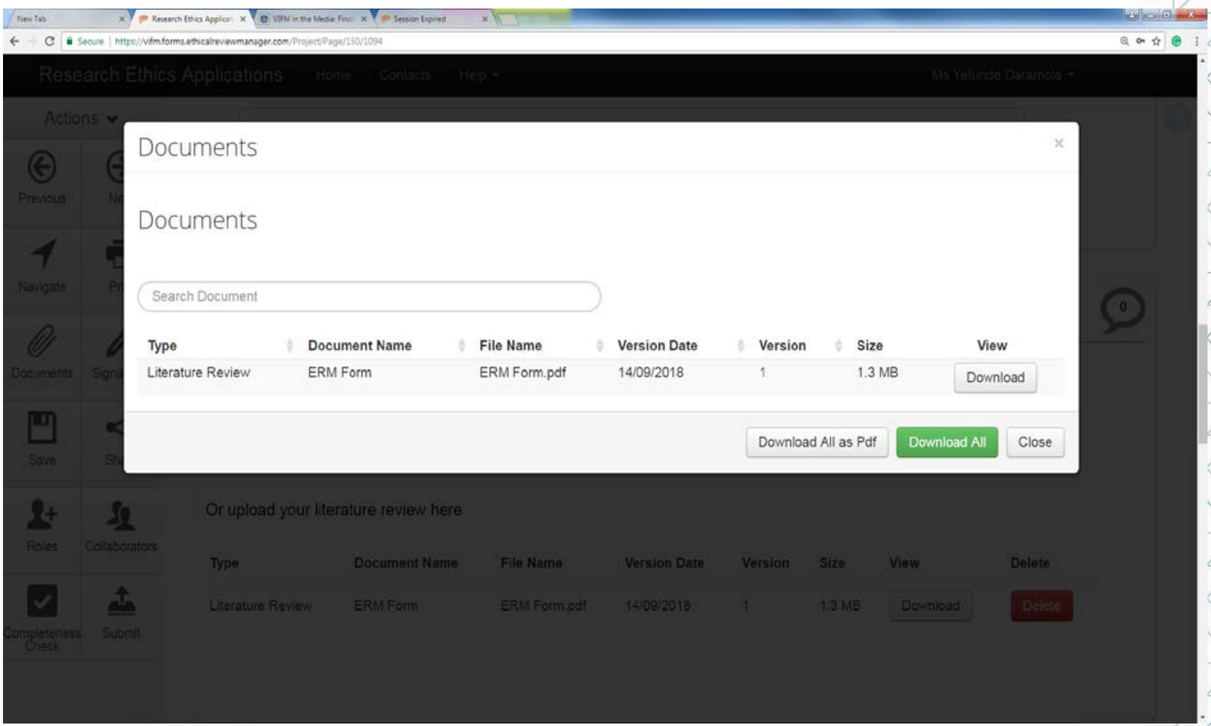
If the form is complete, click the Submit tile to submit the form and on successful submission you will be re-directed to a page congratulating you on your submission.

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.



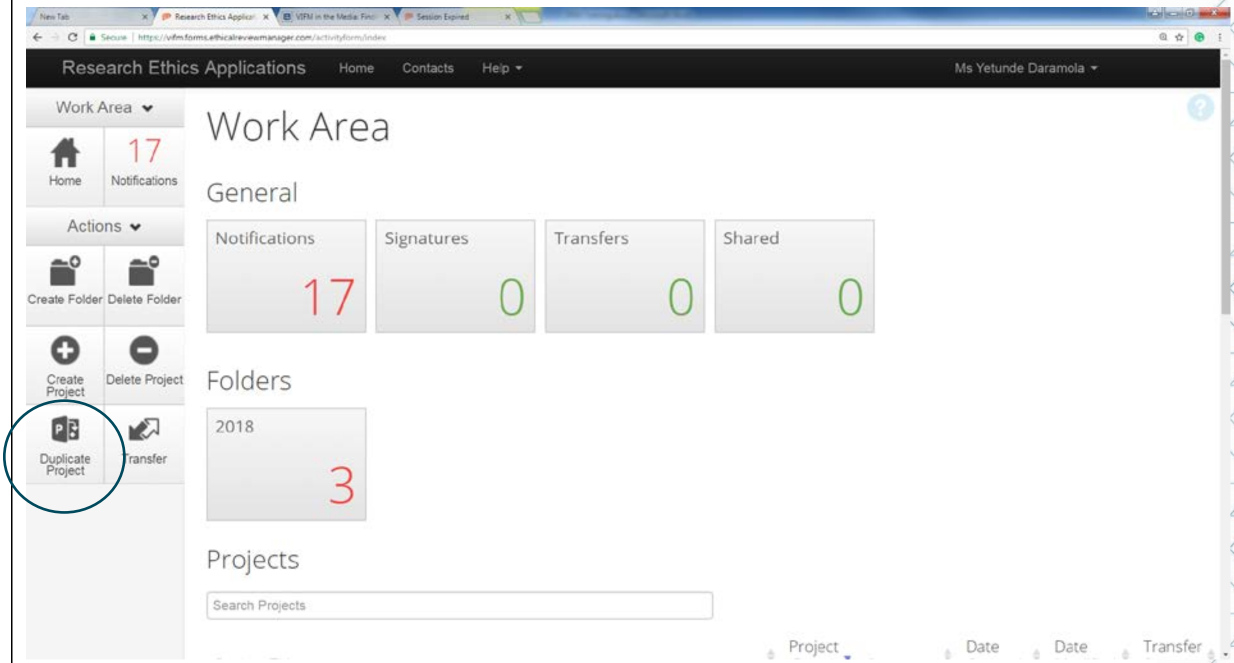
You are able to download the document as a PDF and print as per normal.



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.



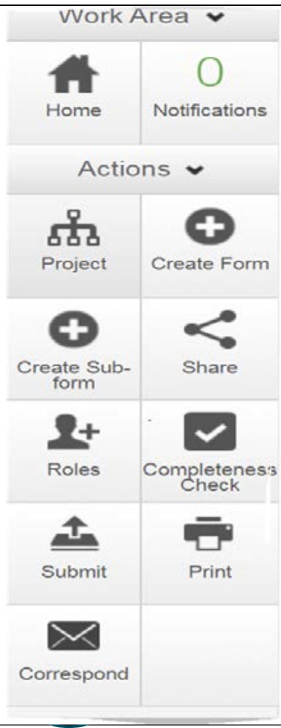
8. How to correspond through the ERM system

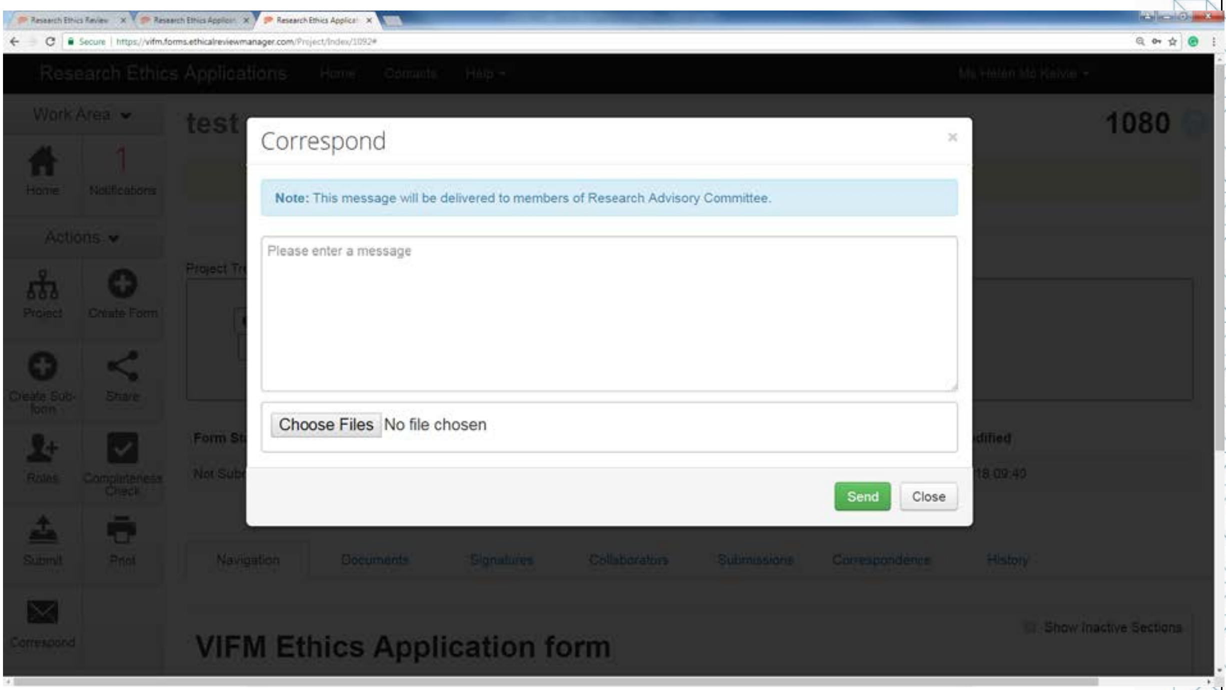
Applicants and collaborators can send messages to the Research Advisory Committee through the ERM system. It is also possible to send documents attached to a message.

Applicants will also receive notifications from reviewers and administrators.

Correspondence can be initiated before and after submission.

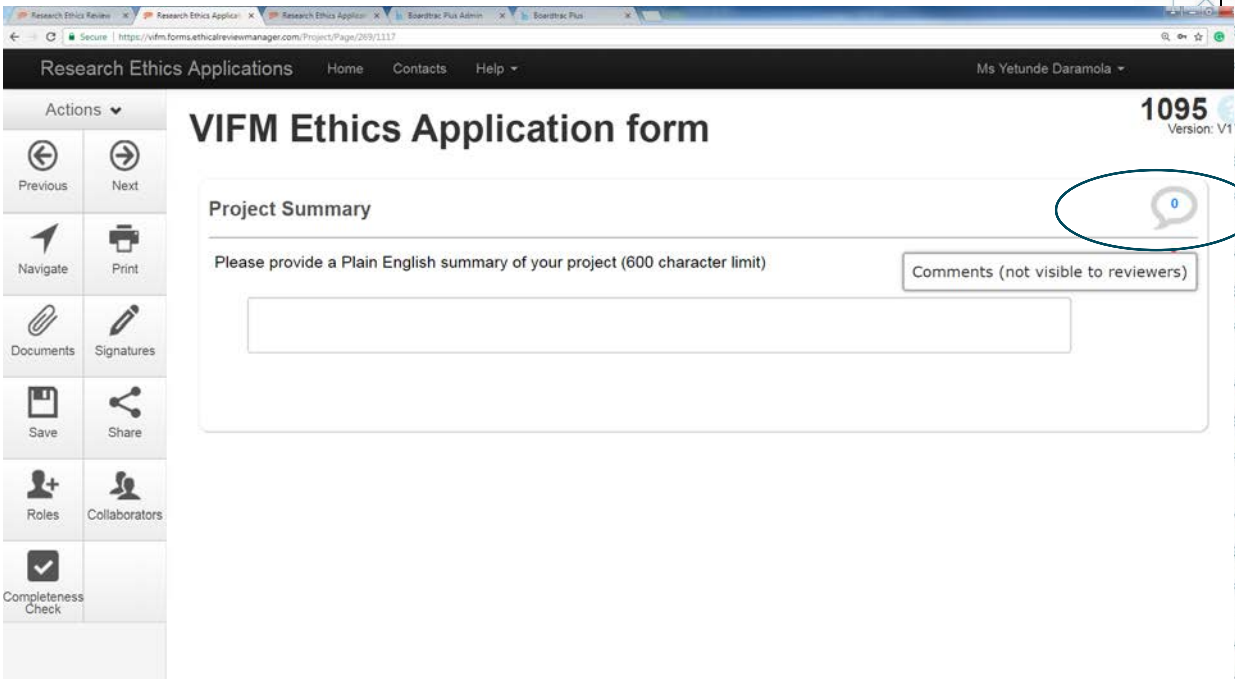
Click on the “Correspond” tile to send a message to the Research Advisory Committee.



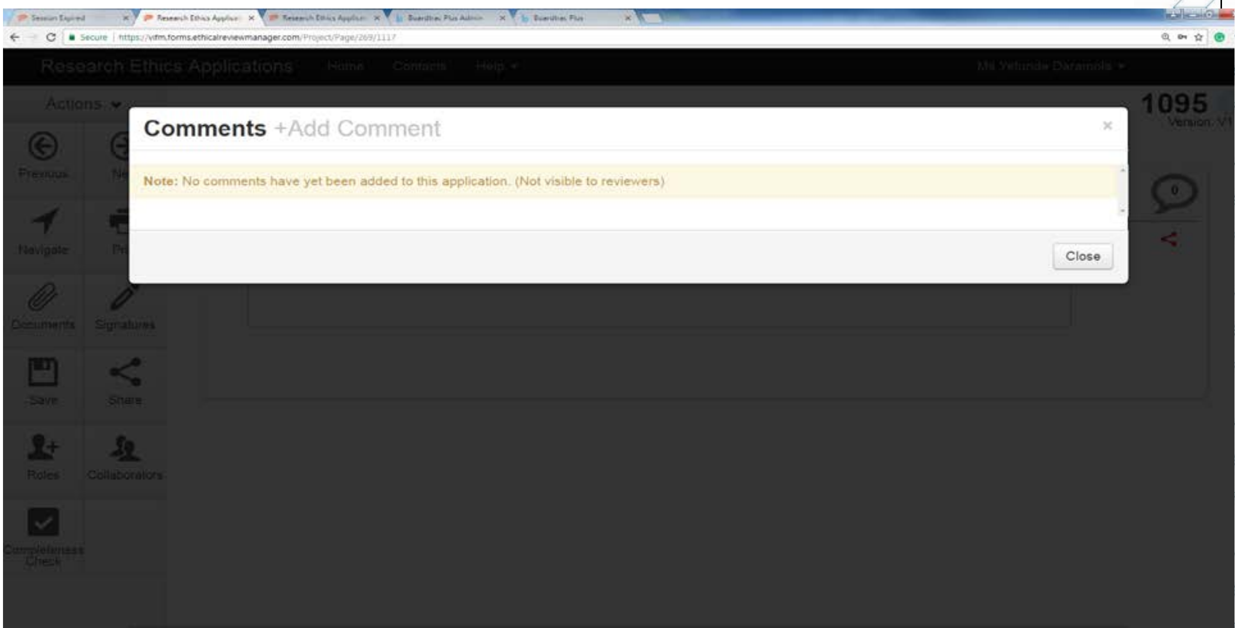


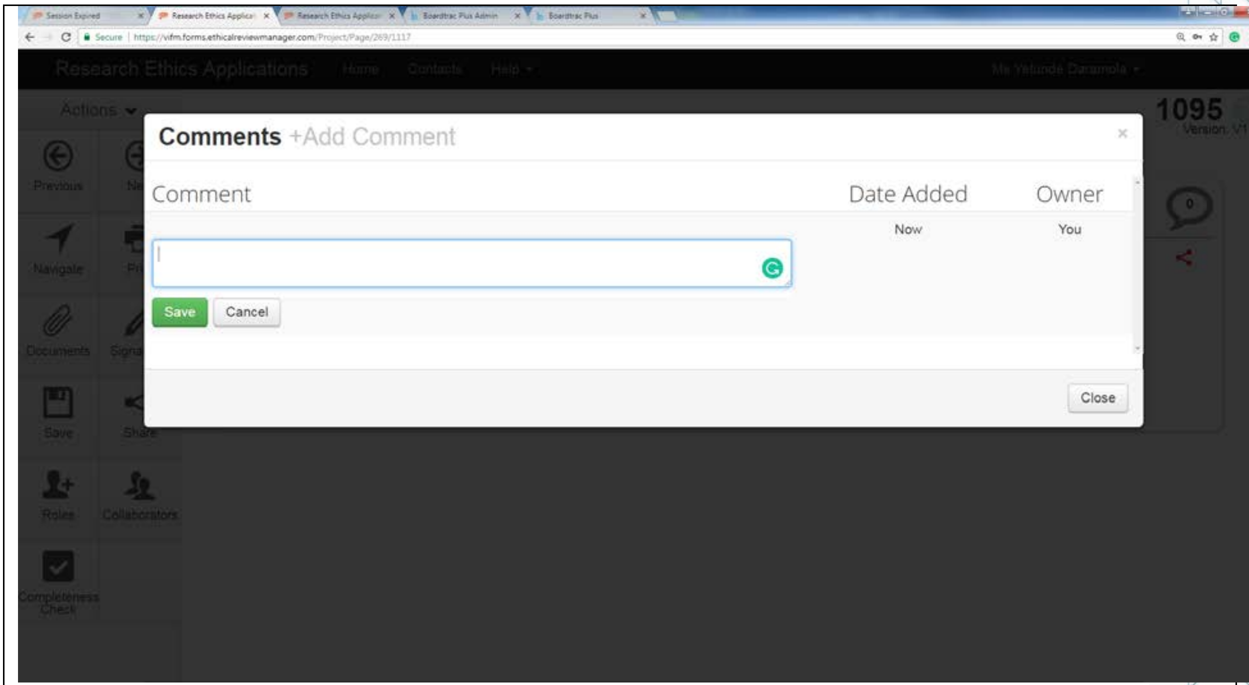
To communicate with your collaborators, click on the speech bubble in the application form and insert your message. Please note that these comments are not visible to reviewers.

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.

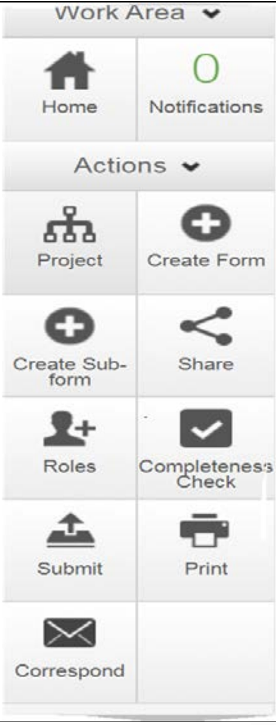




Type in your comment, click save and close when you have finished.

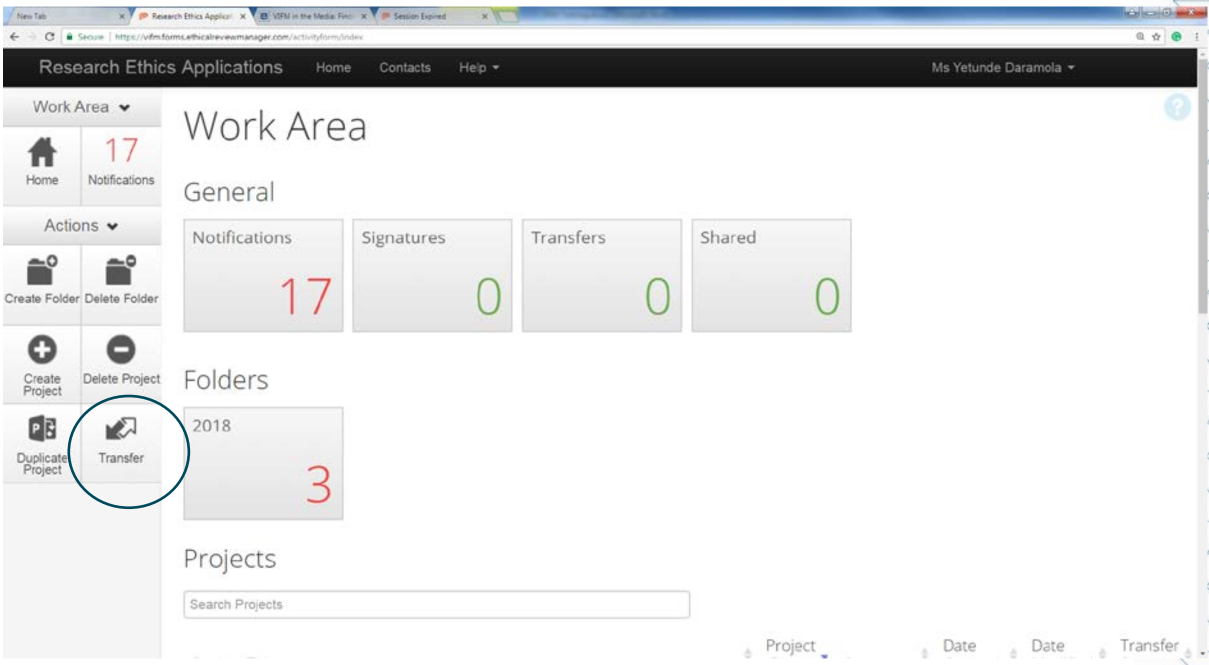
9. How to print an application form

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.



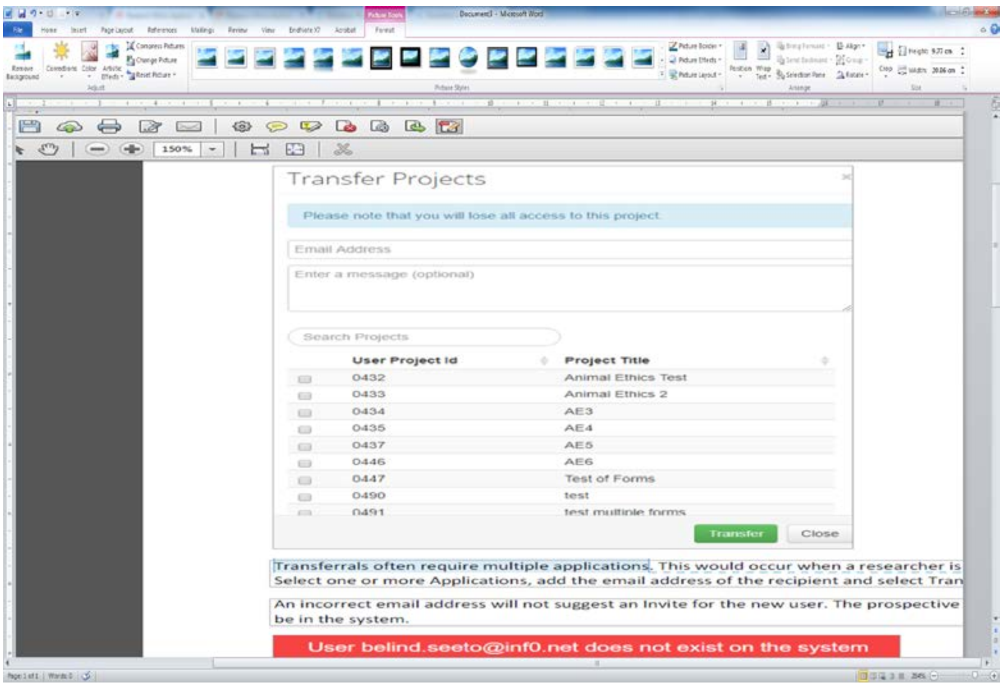
10. How to transfer ownership of an application to another person.

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.



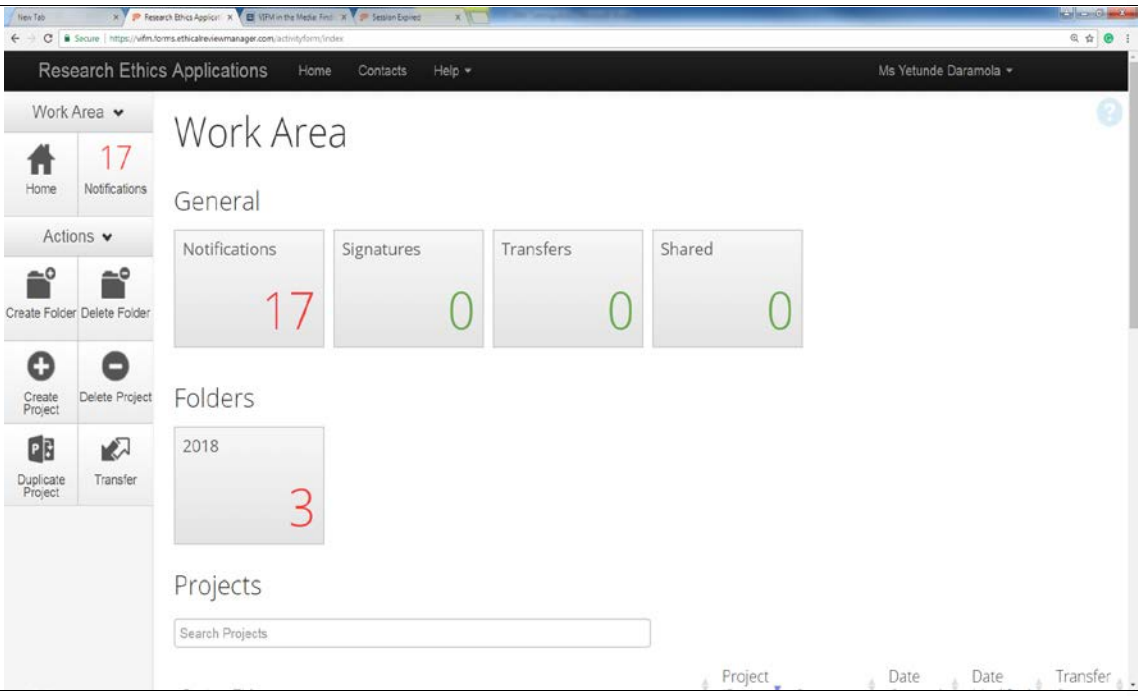
This will take you to the next screen.

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.

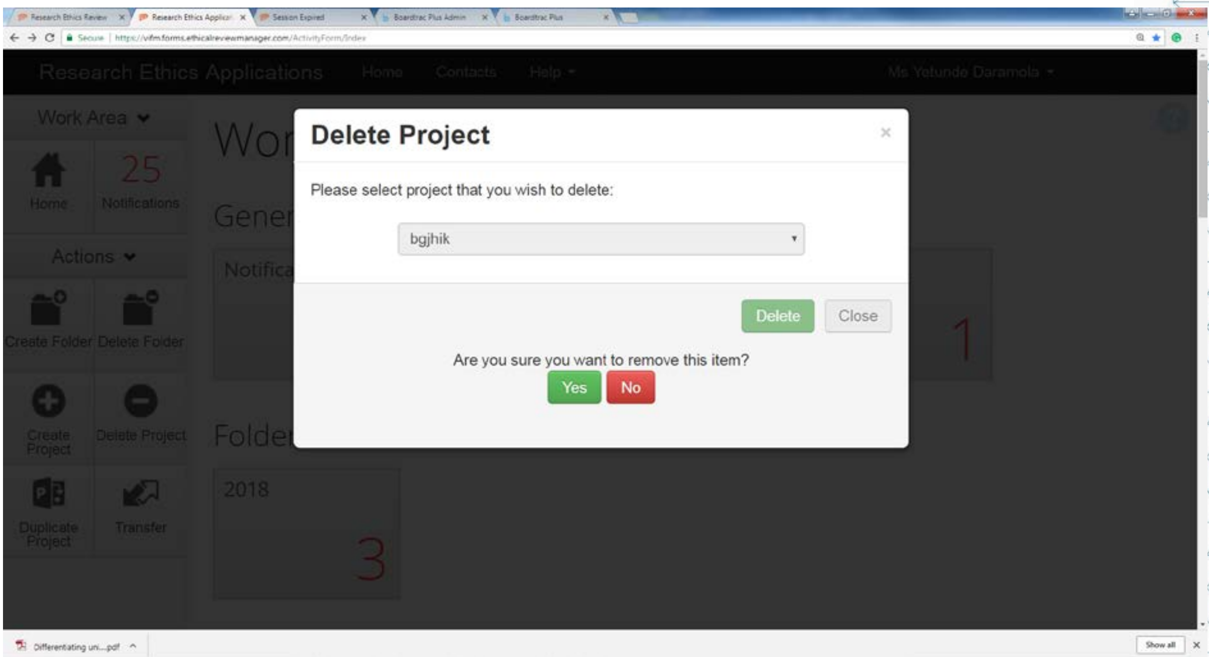


11. How to delete an application form

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.