

V.2. 2022-02-01

<p><b>USE THIS GUIDE FOR:</b> Next steps after pSite invitations have been sent</p>	<p><b>USE THIS GUIDE IF YOU ARE A:</b> PI or Coordinator for the Lead site</p>
<p><b>SUMMARY:</b> Once a Lead Site has been approved, they can invite up to 6 pSites to collaborate and join the study. During this process:</p> <ul style="list-style-type: none"> <li>• The <b>Lead Site's REB assumes the role of Board of Record (BoR)</b> for ALL participating sites</li> <li>• All sites, regardless of if they share the same BoR as the Lead Site, will <b>use their own institutional REB system</b> to:             <ul style="list-style-type: none"> <li>&gt; submit their own application</li> <li>&gt; submit documentation, renewals, modifications and reportable events</li> <li>&gt; view status updates and history</li> <li>&gt; see the Lead Study documents and certifications</li> </ul> </li> </ul>	

After pSites have been invited to your join your approved study, **a new tab titled "SITES" will be listed** in your study's workspace. To access, open the REB tab, and click on the approved study name. You will now see the "sites" tab. This is where you can view and quickly **see each pSite's state of review**. *Note: You can only see the pSite submission once it has been sent by the host institution to the BoR.*

Inbox	<b>REB</b>	Templates	REB Protocols Research List	ACC Protocols Resrch List		
ID	Name	Short Title	Date Modified	Type	Legacy File#	State
REB21-1532_SITE3	University of Calgary-P3 Participating Site for REB21-1532		12/13/2021 6:14 PM	Site Submission		Invitation Pending



History	Attachments	<b>Sites</b>	Reviewer Notes	Change Log
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**Current State**

View Site

Print Project

View Differences

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Update From REB Exchange

Add Comment

Download Mod from REB Exchange

Report Continuing Review Data

Correspond with Site

### Key States of Review:

#### INVITATION PENDING

BoR is in the process of approving the addition of a pSite. At this time the pSite workspace is not visible in the pSite's institutional REB.

#### AWAITING SITE MATERIALS

The BoR has approved the pSite invitation and it is now with the pSite institution.

#### PRE-REVIEW STATE

The pSite has been received by the BoR and will be assigned for ethics review.

#### DELEGATED / BOARD REVIEW STATE - pSITE ID

Once the application is received by the BoR, documents and the application for the pSite can be viewed by the Lead Site.

By going through the REBX and a common BoR for all site approvals:

- communication and documentation is streamlined,
- collaboration visible,
- and required documentation is drastically reduced.

Timelines for participating site approvals are condensed because all additional applications are reviewed within the context of the Lead site's approved application and shared documentation.

## ACTIVE pSITES

Once a pSite has been approved by the Board of Record, the state will change to ACTIVE and the certificate can be viewed by the Lead Site.

### How can I see pSite applications and certificate?

While a pSite is in review with the BoR, the Lead site can **open the SITES tab** and **click on the name of the pSite** to open the pSite application view.

Activity	Author	Activity Date
Correspondence Sent	Adminrator, System	12/8/2021 2:37 PM
Approval Certificate		
Site Materials Submitted	Adminrator, System	12/8/2021 2:31 PM

In this view you can see: the current state, the **pSite ID** (which also acts as a link to **the application**), activity history for the pSite, and a link to the **letter of approval** once issued.

### How can I see pSite documents?

While in the pSite workspace, the Lead site can access pSites' uploaded documents including consent forms, recruitment materials, and other attachments specific to the site.

**Click the "VIEW SITE" button** in the left menu bar to access local site information, funding information, local site consent forms and other uploaded documents.

Document	Document Date	Upload Date	Version	History
b:ank(1234)		12/8/2021 2:17 PM	1234	History

  

Document	Document Date	Upload Date	Version	History
pSite-21-0018.html(0.01)		12/8/2021 2:27 PM	0.01	History