Overview

Once a protocol is approved the PI (if granted full access on the protocol) or Admin can initiate an Amendment or Renewal on the protocol if needed. This will allow you to modify or submit a request for a renewal on the same protocol. Within these actions you can update information and attach necessary updated documents for review.

When an Amendment or Renewal is initiated it creates a separate request under the same protocol number and once approved it merges the changes back into the original. Please note, only one outstanding action can be done on a given protocol. If an amendment or renewal is already initiated on a protocol the Amend and Renew action buttons will be greyed out in the existing approved protocol.
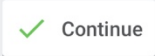
Amend

On an approved protocol the Amend button will be available if you need to make a change, modification, or addition to something on the protocol. This button will only be available to those granted full access to the protocol or an admin can initiate.

Upon clicking the Amend you will be required to fill out more detail on the reason for the Amendment. Once you complete and click continue it will initiate an amendment on the protocol in which you will need to fill out the necessary information and attachments. Depending on how your institution has configured the template will dictate what information is required when completing an amendment action.

Amendment Justification

Explain the Reason for this Amendment

× Cancel   ✓ Continue

Once complete you can submit the protocol for review/approval and the same available actions and functionality is available as when you initially submitted your protocol - more information on the submission/review process can be found in the 'Submitting a Protocol' article.

Renew

Users with the appropriate access on the protocol can also request a renewal action to extend the approval of the protocol. Upon clicking 'Renew' button it will initiate a new outstanding protocol request. Once complete you can submit the protocol for review/approval and the same available actions and functionality is available as when you initially submitted your protocol - more information on the submission/review process can be found in the 'Submitting a Protocol' article.
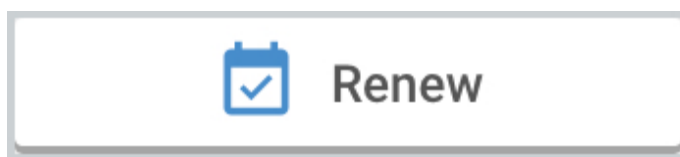
☑ Renew

Renew/Amend

If enabled via General Configuration the Renew/Amend option is also available on an approved protocol if a user wants to do both a Renewal and an Amendment in the same action. This will initiate an edit on the protocol and the renewal form will be generated to complete.

✏ Renew/Amend
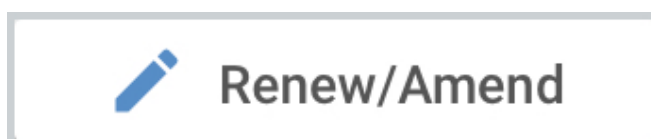
Changes to Manage Protocols

Once you've taken one of the actions above your new submission will appear in the Manage Protocols screen along with the most recent approved version of your protocol. Once your submission is approved, disapproved, or abandoned it will no longer appear in the Mange Protocols screen. If it is approved then any changes will be merged into the protocol and can be accessed by opening the current Approved version of your protocol.

TITLE	NUMBER ▾	PI	SUBMISSION TYPE	REVIEW TYPE	STATUS	ASSIGNMENT
This is my protocol	200	BORST, BARBRA	Amended	Exempt	● Approved	
This is my protocol	200	BORST, BARBRA	Renew/Amend	Designated Member Review	● Revisions Required	Kat's Committee

2 of 2 protocols   Load 100 at a Time ▾