

How to Upload and Name New Documents

ePIRATE Training



This tutorial shows you how to upload and name new documents in ePIRATE.

The processes described in these slides are shown in screen view 7.1 (Informed Consent Documents) but applies to any screen view in a study submission and all document types and file formats.

The steps for adding new documents (specifically one that never existed) and for uploading a revised version of an existing document are different and both processes will be shown in this tutorial.

- 1 - Study Personnel & Funding
 - 1 Study Identification
 - 1.1 Study Staff Roles and Responsibilities
 - 1.2 IRB Researcher Training Records
 - 1.3 Funding Sources
 - 1.31 Industry Sponsor Information
 - 1.32 Federal Government Sponsored Studies
 - 1.33 Non-Profit Sponsored Studies
 - 1.34 State or Local Government
 - 1.35 Other University or College
 - 1.36 Internally Funded (ECU)
 - 1.4 Conflict of Interest
 - 1.43 Sponsored Programs & Conflict of Interest
 - 1.5 Study Locations
 - 1.51 Multi-Site Coordination Center
 - 1.53 External IRB

- Genetic Testing Consent Template
- Local Boilerplate Language for NCI-CIRB Approved Consents Only
- Local Boilerplate Language for NCI-CIRB Approved Youth Information Sheets (Assents)
- Local Boilerplate Language for Sponsor's Consent Template (does not apply to NCI-CIRB approved studies)
- Minor Assent Template
- Parent Consent to Use Child's Data for Research Purposes (ONLY for use in Exempt Category #1 research)
- Parent Permission Form

* 1.2) Upload consent form

+ Add

A "+ Add" button will be found anywhere that documents can be uploaded in an ePIRATE submission.

| Name | Modified | Version |
|--|--------------------|---------|
| Sample Consent Document Updated 5-25-2021.docx(0.02) | 5/25/2021 11:06 AM | 0.02 |

1.3) If available, upload sp

+ Add

Question 1.2 currently has one document, a sample consent document, uploaded. If, for instance, an assent document needed to also be uploaded, this would be done using the + Add button.

| Name | Modified | Version |
|-------------------------------|----------|---------|
| There are no items to display | | |

1.4) Upload Tracked Change sheets here:

+ Add

| Name | Modified | Version |
|-------------------------------|----------|---------|
| There are no items to display | | |

2.0 * Describe how, when, and where the consent process

1

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Submit a Document

Title:

If not provided, the name of the file will be used

* File: **Choose File**

Show Advanced Options

* Required

OK

OK and Add Another

Cancel

Clicking the + Add button will bring up this pop-up window. Click "Choose File" to choose a new document you wish to upload.

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Submit a Document

Title:

If not provided, the name of the file will be used

* File:

Choose File

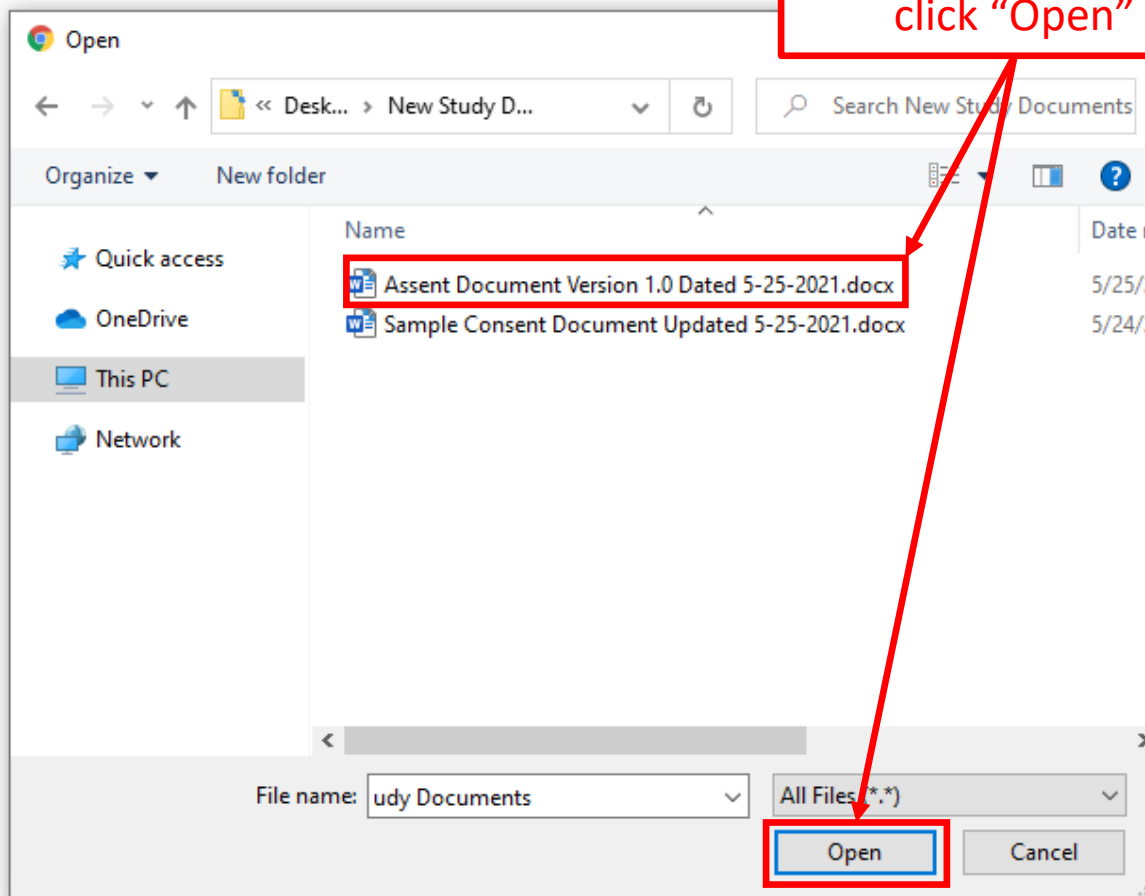
Show Advanced Options

* Required

Open

Cancel

A file explorer will open allowing you to locate the file you would like to add. Choose the file and click "Open"



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Submit a Document

Title:
If not provided, the name of the file will be used

* File:

The file you selected will appear here.

Show Advanced Options

* Required



Click "OK" to upload the file in the smart form.

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- Parental Consent Template
- Parental Consent Template

Now, the assent document has also been uploaded in the smart form and appears as a new item in the list below

* 1.2) Upload consent forms, assent forms, or information sheets here:

| Name | Modified | Version |
|--|--------------------|---------|
|  Assent Document Version 1.0 Dated 5-25-2021.docx(0.01) | 5/25/2021 11:10 AM | 0.01 |
|  Sample Consent Document Updated 5-25-2021.docx(0.02) | 5/25/2021 11:06 AM | 0.02 |

1.3) If available, upload sponsor templates:

| Name | Modified | Version |
|-------------------------------|----------|---------|
| There are no items to display | | |

1.4) Upload Tracked Changes versions of consent forms, assent forms, or information sheets here:

| Name | Modified | Version |
|-------------------------------|----------|---------|
| There are no items to display | | |

2.0 * Describe how, when, and where the consent process

The + Add button should only be used for adding documents that do not currently exist in the form.

The process for uploading revised versions of existing documents shares some of the same steps but has key differences.

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Genetic Testing Consent Template

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Local Boilerplate Language for Sponsor's Consent Template (does not apply to NCI-CIRB approved studies)

Minor Assent Template

Parent Consent to Use Child's Data for Research Purposes (ONLY for use in Exempt Category #1 research)

Parent Permission Form Template: No More than Minimal Risk Research

* 1.2) Upload consent forms, assent forms, or information sheets here:

+ Add Drag and drop files to upload

| Name | Modified | Version |
|------------------------------------|-------------------|---------|
| Sample Consent Document.docx(0.01) | 5/24/2021 5:27 PM | 0.01 |

1.3) If available

| | | |
|-------|--|---------|
| + Add | | |
| Name | | Version |

There are no items to display

- Download Copy
- Upload Revision
- View History
- Delete

The three dots next to any document can be clicked to open this menu.

1.4) Upload Tracked Changes versions of consent forms, assent forms, or information sheets here:

+ Add

| Name | Modified | Version |
|------|----------|---------|
|------|----------|---------|

There are no items to display

2.0 * Describe how, when, and where the consent process will be initiated:

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Exit Save Continue

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+ Add Drag and drop files to upload

| Name | Modified | Version |
|------------------------------------|-------------------|---------|
| Sample Consent Document.docx(0.01) | 5/24/2021 5:27 PM | 0.01 |

1.3) If available:

+ Add

| Name | Version |
|-------------------------------|---------|
| There are no items to display | |

1.4) Upload Tracked Changes versions of consent forms, assent forms, or information sheets here:

+ Add

| Name | Modified | Version |
|-------------------------------|----------|---------|
| There are no items to display | | |

2.0 * Describe how, when, and where the consent process will be initiated:

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If you want to upload an updated version of a document, choose "Upload Revision"

- Download Copy
- Upload Revision
- View History
- Delete

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2.0

Submit a Document

Title:

If not provided, the name of the file will be used

* File:

[View](#)

* Required

Note that the title of the existing document is pre-populated in this box.

The same pop-up window will open allowing you to find the file you want to upload. As before, select "Choose File" to open a file explorer.

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Submit a Document

Title:

If not provided, the name of the file will be used

* File:

[View](#)

Select the new file you want to upload in place of the existing file and click "Open".

* Required

Open

« Desk... » New Study D... Search New Study Documents

Organize New folder

| Name | Date |
|--|-----------|
| Sample Consent Document Updated 5-25-2021.docx | 5/24/2021 |

File name: All Files (*.*)

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2.0

Submit a Document

Help

Title:

If not provided, the name of the file will be used

* File:

[View](#)

* Required

The new file is listed in the File field, however the Title does not automatically change.

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2.0

Submit a Document

Help

Title:

If not provided, the name of the file will be used

* File:

[View](#)

Show Advanced Options

* Required

OK

OK and Add Another


Cancel

You could leave the title as is, change it to something different or delete the field all together as it has been done here.

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| Name | Modified | Version |
|--|--------------------|---------|
|  Sample Consent Document Updated 5-25-2021.docx(0.02) | 5/25/2021 11:06 AM | 0.02 |

Notice that the version number has changed to 0.02 and the title of the document has changed as well. The Title field can be used to add a custom name, however if it is left blank, ePIRATE will display the name of the file. If you click on the three dots again and select "View History" you will be able to access all historical uploaded versions of the document.

| Name | Modified | Version |
|-------------------------------|----------|---------|
| There are no items to display | | |

2.0 * Describe how, when, and where the consent process

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How you choose to name documents in ePIRATE impacts both how they appear in the smart form as well as how they appear in approval letters.

Approval letters pull document titles from how they appear in the workspace. Before it was updated, the document was titled “Sample Consent Document.docx”. This is what would have been listed in the approved documents section of the approval letter.

Many sponsors require approval letters to show specific versions or dates and will not accept letters with generic document titles.

Beyond sponsor acceptance, having clear document titles with unique identifiers helps to keep track of them in ePIRATE.

Always use the Upload Revision function instead of the + Add button when uploading updated versions of existing documents.