GETTING STARTED: Submitting Amendments/Continuing Reviews in IDEATE (Existing IRBNet Projects)

1. **IDEATE Log-in Instructions:** All investigators and research assistants must log into IDEATE (https://ideate.cuny.edu/home/) using their CUNY Portal Log-In Credentials. We have been notified by CUNY Central that anyone with CUNY Portal Credentials can log into IDEATE. Please follow these steps if you have problems logging into IDEATE:

   a) If you encounter log-in issues during the first attempt or can’t remember your CUNY Portal Information please reset your CUNY Portal password using this link: https://cunyportal.cuny.edu/cpr/authenticate/portal_login.jsp. You can also contact your campus helpdesk for assistance with resetting your CUNY Portal password.

   b) If you continue to experience log-in issues please contact your HRPP Coordinator providing them with your CUNY Portal Username. Please make sure to put IDEATE Log-in Issue in the subject line of your email.

   The above instructions should be used by investigators and their research staff for their first attempt at logging onto IDEATE ONLY. Please use instructions below for IDEATE Profile issues.

2. **IDEATE Profile Issues:** Note that if you can log into the system but cannot create an application, this is likely a profile issue. It is important that your name/department are correct in the system. Note that the department can be listed as your school, department, or college. It is important that your department is correct as this is how submissions will be routed to HRPP Offices in IDEATE. Please check your IDEATE Profile to ensure that all information (Name, Department, etc.) are correct. Check your profile by doing the following:

   a. Click on the “Manage” link on the top of the page.
   b. Then click on “My User Profile”
   c. Please make sure that all information (Name, Department, University Status, etc.) in your profile is correct. If Name or department is incorrect please contact your HRPP Coordinator to request profile changes.

3. Please make sure that all of your active projects (i.e. expedited/full board projects with current approval/expiration dates) are listed in the Live List (the list of projects in the middle of the page). If active expedited/full board projects are missing please contact your Coordinator.

4. Prior to creating an amendment/continuing review form please contact your Coordinator and request that an Administrative Amendment be created to update age ranges and enrolled participants in the enrollment tab. This tab is locked and cannot be updated by PI’s. The IDEATE protocol cannot be submitted without this information.

5. To create an amendment or continuing review form for an existing project please do the following:

   a. Click on the protocol number of the project to open your protocol.
   b. Then click on the “Lifecycle Event Manager” tab in the Live List.
   c. In the Actions drop down box please choose “Create Amendment or Continuing Review” then click on the “Go” button to the right of the Actions field.

6. Please fill out either the amendment/continuing reviews filling in the missing items in the IDEATE research protocol (i.e. IRB Application).

7. If you need additional information regarding how to submit IDEATE submissions please refer to the help documents link: http://cuny.edu/research/compliance/human-subjects-research-1/hrpp-policies-procedures/how-to-use-ideate.html.

   These documents are proprietary and require a username/password. Please contact your Coordinator for username/password access to these documents.