

# Progress Reports





## Access a Progress Report that is Submitted

### De novo Review

If a submitted Progress Report is the De novo Review, once the Analyst opens the Progress Report, a banner will indicate this is a De novo Review.

From the dashboard, go to:

- Analyst Business Item Queue

View	Request Type	Submit Date	Last Updated	Last Updated By	Expiration	Protocol No.	Title
	Progress Report Continue Protocol	06/26/2014 11:14 am	06/26/2014 11:14 am	James Garrison	07/01/2014	07090x	<input type="text"/>
	Progress Report Continue Protocol	06/26/2014 11:47 am	06/26/2014 11:47 am	James Garrison	03/01/2014	00080B	<input type="text"/>
	Progress Report Continue Protocol	06/26/2014 11:50 am	06/26/2014 11:50 am	Eva Kizer	11/01/2013	09131x	<input type="text"/>
	Progress Report Inactivate Protocol	06/27/2014 08:52 am	06/27/2014 08:53 am	Michelle Mendoza	01/01/2014	06050x	Nephropathy in Yldfh

- Locate the Protocol you will be working with.
- Click the folder in the View column. You will automatically be directed to the Analyst view of the Progress Report

### What can I do from this page?

- The below menu are functions to use when reviewing:
  - The Progress Report on your screen [can be edited](#). Be sure to click **Save** after you have made edits
  - Use the Comments feature to enter any internal comments.
  - To return to PI, click **Send Back to PI**
  - If the Progress Report is ready, click **Ready for Review**
  - After the Progress Report is reviewed, the analyst will need to return to this page and either **Approve or Disapprove** the progress report.

Form Status: **Submitted** | Last Updated By: **PI** | Record Last Updated: **07/02/2014 04:50 pm** | Updated By: **[redacted]@uthscsa.edu**

Send Back to PI: **Send Back to PI**

Analyst Actions: **Comments** **Save** **Ready for Review**

Reviewer Disposition: **Approved** **Disapproved**

Documents: **PDF**

**After the progress report is submitted, do not use the Species or Personnel pages under the Analyst Function menu.**

- **Send Back to PI** - Click the mustard button from the analyst menu if the PI will need to edit the progress report.
  1. if the PI needs to be notified, click Return PR with Message (green button)
  2. if the PI does not need to be notified, click Return Progress report (light blue button)

Send Progress Report back to PI for edits

No: 07090x  
PI: Wouter Koek

Message:

(Keep in mind, even though the PI is not notified, if they are logged into ORCA, they will see the the progress report due button) The Message: box will be available to you, but you should not use. Text entered will not be stored and will not be routed to anyone. Use this method if you need the PI to make changes but you do not want to send the email notification.

**When the progress report is returned to the PI, it can be edited by the RRP staff. The Send Back to PI is used when the progress report has been submitted.**

**Note: If the progress report is returned for editing, the delegate can make the changes and submit back to the office. The PI is not required to login and submit.**

**From IACUC Protocol listing, if a Progress report is submitted, you will still see the pending icon  .**

## View or Update a Progress Report that is In-Progress

If you would like to view or make changes to the progress report that is in progress:

1. Go to IACUC Protocols (shortcut is in Analyst Quick Links)
2. Locate protocol
3. Click the folder icon for the protocol
4. Click Progress Report Review from the menu

1. the Form Status will state: **In-Progress**

Form Status: **In-Progress** | Last Updated By: PI | Record Last Updated: 06/30/2014 10:53 am | Updated By: mendozamm@uthscsa.edu

Send Back to PI:

[Send Back to PI](#)

Analyst Actions:

[Save](#) [Ready for Review](#)

Reviewer Disposition:

[Approved](#) [Disapproved](#)

Documents:

[PDF](#)

5. Make updates as necessary on the screen you are viewing.
6. Use the Comments feature to enter any internal comments.
7. Click the **Save** button when you are done.

**Refresh**

If you are on the phone with the investigator (co-pi or delegate), have them refresh their screen to see the edits you have entered.

## Automatic Notifications for IACUC Progress Reports

Notifications Log will be displayed on your dashboard near Pending Items.

- De novo Review: If the submitted progress report is the De novo Review, the notification log will display: **IACP Denovo Review Due**

Notifications for PI, co-PI, and delegate(s)

- Notifications that progress report is due will be sent at the following time-points – 30 days; 15 days; 7 days; 3 days; 1 day before the expiration. Once the progress report is submitted, the notifications will stop.
- Notification that the protocol is expired will be sent at midnight on the day of the expiration.

Notifications for Staff

- Notification that protocol will expire will be sent to [IACP@uthscsa.edu](mailto:IACP@uthscsa.edu) at midnight on the day before the expiration.

Viewing Notification details

- To view the notifications in ORCA, go to the Analyst Queue on the dashboard and click on the Notifications Log tab.

Pending Items		Notifications Log			
Automated Notifications (last 5 days)					
Protocol Num	Title	Regulatory Expiration	Notification	Receipients	Send
2014050AR		2015-04-02	IACP Progress Report Due Follow-up 2	mendozamm@uthscsa.edu	Mar 26 2015 11:45:02:000PM
2014056AR		2015-04-10	IACP Progress Report Due Follow-up 1	mendozamm@uthscsa.edu	Mar 26 2015 11:45:02:000PM
2011044AR		2015-04-01	IACP Progress Report Due Follow-up 2	mendozamm@uthscsa.edu, g...n@uthscsa.edu	Mar 25 2015 11:45:03:000PM
2010086AR		2015-03-22	IACP Protocol Expired	mendozamm@uthscsa.edu, g...n@uthscsa.edu	Mar 22 2015 11:45:03:000PM

- Alternately you can go to the Protocol list, find the protocol and click on protocol history.

Due Date:	2015-04-09	Status:	APNC-Approved / No Changes
Protocol #:	2014051AR / 14051x	Investigator:	J [redacted] d ([redacted]@uthscsa.edu) (210) 567-[redacted]
Title:	[redacted]		

Date	Event	Outcome	Last Updated By	Details
03/25/2015 11:45 pm	IACP Progress Report Due Follow-up 1 Notification	Sent to [redacted]@uthscsa.edu		