

Sinai Health Online Research Ethics System (SHORES) Applicant

Online User Guide: Application Features

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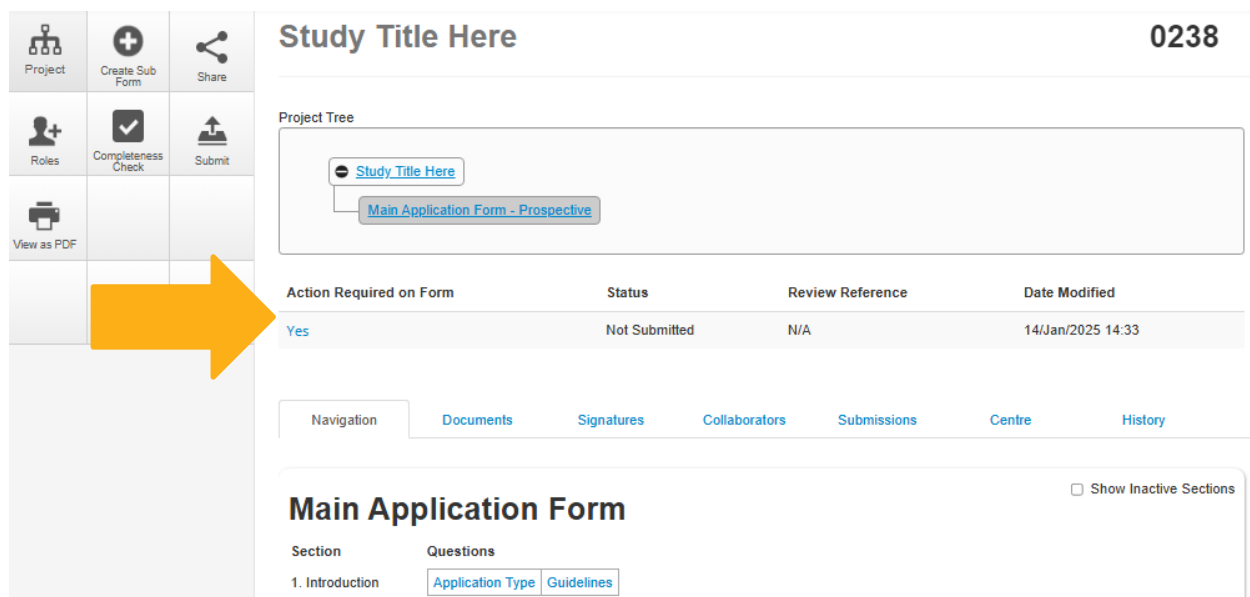
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1. APPLICATION STATUS

Every form within a project will have the following information associated with it:

- **Action Required on Form** – whether the applicant currently needs to perform an action to move the form through the REB review process
- **Status** – current status of the form within the REB review process
- **Review Reference** – each form will receive a number once it has been submitted
- **Date Modified** – the last date the form was modified



Study Title Here 0238

Project Tree

- Study Title Here
 - Main Application Form - Prospective

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	14/Jan/2025 14:33

Main Application Form ☐ Show Inactive Sections

Section: 1. Introduction Questions: [Application Type](#) [Guidelines](#)

2. ACTIONS TOOLBAR: PROJECT

The **Actions Toolbar** will display all actions available in SHORES. The Actions Toolbar is dynamic and will only display the actions currently available to the user depending on what stage you're at in the system.

2.1. Project Menu

The **Project Menu** contains a list of all of the Projects to which you currently have access. You can easily search this project menu by using the '**Search Projects**' search bar.

SHORES - Applicant Site

Work Area

Contacts

Help

Ms. Roxanne Noronha

Create Folder

Delete Folder

Create Project

Delete Project

Duplicate Project

Move Project

Transfer

Work Area

Notifications

40

Signatures

0

Transfers

0

Shared

1

Project Folders

All Projects

9

Retrospective

1

Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified	Transfer Status
Study Title	236	Ms. Roxanne Noronha	02/jan/2025 13:28	10/jan/2025 14:57	
> Test RN 7	234	Ms. Roxanne Noronha	13/Dec/2024 16:03	13/Dec/2024 16:11	
> Test RN 6 Retro	230	Ms. Roxanne Noronha	11/Dec/2024 10:56	11/Dec/2024 11:16	

2.1 Collaborating on a Project

By clicking on the **Collaborators** tab, you can change the permissions that a person has for the study.

2.1.1 Individual Form Sharing

The Project Owner and/or Form Owner and PI, will have access to the application and forms within that application. The **Share** tile allows you to share the currently selected form with an additional individuals. This action will only share the form you have selected. It will not share any other forms associated with the project.

To complete the action, click the **Share** tile within the **Actions Toolbar**.

Project

Create Sub Form

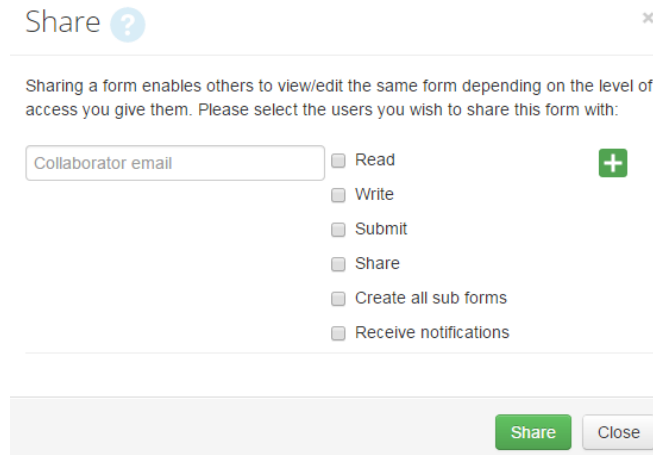
Share

View as PDF

Correspond

Study Summary

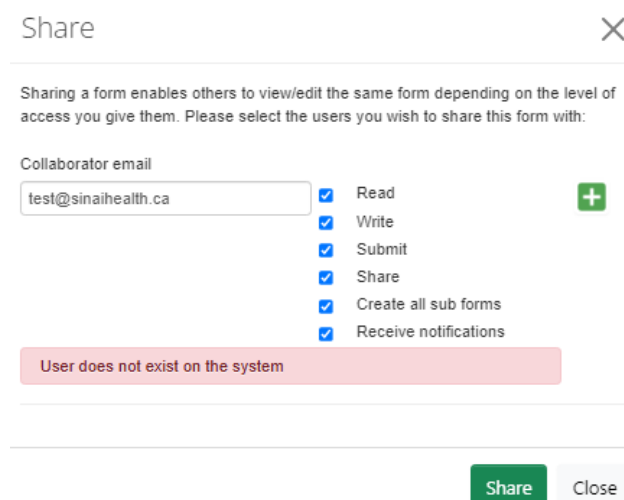
You will be presented with a dialog box where you can enter the collaborator's email address:



When adding a collaborator, you can select from the six sharing options available:

- **Read** – The collaborator will be allowed to read the application
- **Write** – The collaborator will be able to make changes to the application
- **Submit** – The collaborator will be able to submit the application to the REB
- **Share** – The collaborator will be able to share the application with other study staff
- **Create all Sub Forms** – The collaborator will be able to create all sub forms for that application and have full permissions to edit and submit those applications
- **Receive Notifications** – The collaborator will receive system notifications related to the shared application form

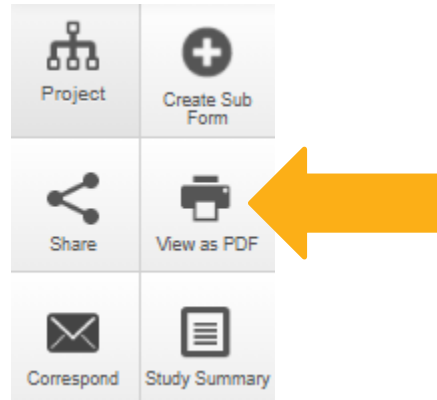
If the email address entered is not registered to a user within SHORES, the system will display the following message:



The new user will need to submit an account request to REB.Office@sinaihealth.ca and have an account generated for them in order to access SHORES.

2.2 View as PDF

By clicking the View as PDF tile, a PDF version of the currently selected form can be downloaded.

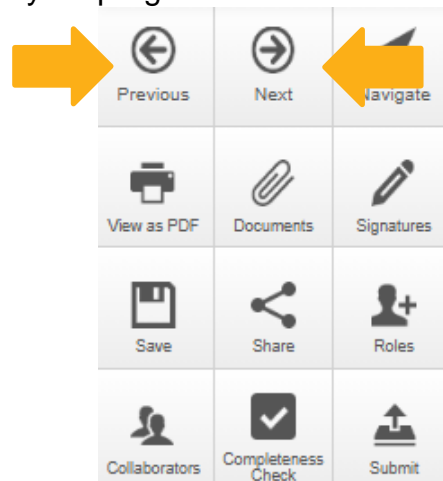


***NOTE:** You cannot print a blank copy of the form; only the sections you have completed will print.

3. ACTIONS TOOLBAR: APPLICATION

3.1. Previous/Next

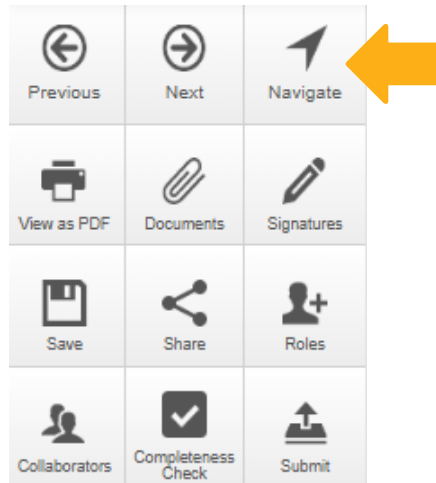
The two tiles highlighted in the image below, **Previous** and **Next**, are displayed once you have begun entering information into an application form. By clicking on the Previous/Next tiles, you will be directed to the Previous/Next section within the application form and all of your progress within the form to that point will be saved.



***NOTE:** Clicking the Backspace or Delete button on your keyboard when you are not in a selected field will result in moving to the previous page and your work will NOT be saved.

3.2. Navigate

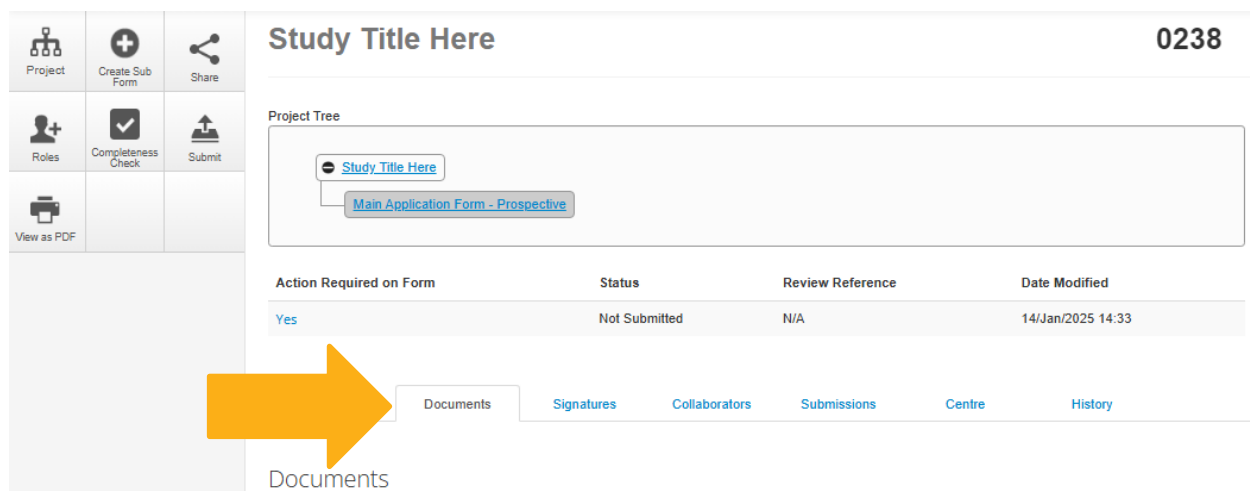
By clicking the **Navigate** tile, you will be directed back to the main page of the currently selected form. When you click on the Navigate tile, all of your progress within the form to that point will be saved.

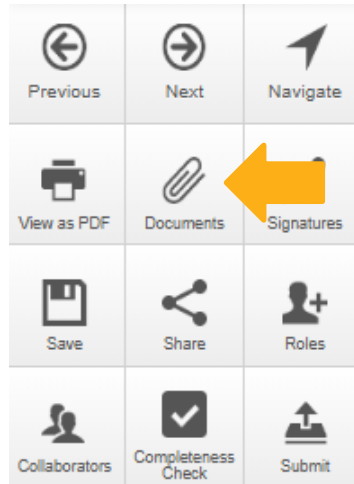


3.3. Documents

You can view all Documents uploaded in the currently selected application form by clicking the **Documents tab** from the application form home page or by clicking the **Documents tile** within a section of the application form:

Clicking either of these links will present you with a list of all documents attached to the currently selected form, along with related information.





3.4. Collaborators

You can view a list of all collaborators in the currently selected application form by clicking the **Collaborators tab** from the application form home page or by clicking the **Collaborators tile** within a section of the application form:

Project

Create Sub Form

Share

Roles

Completeness Check

Submit

View as PDF

Study Title Here

0238

Project Tree

Study Title Here

Main Application Form - Prospective

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	14/Jan/2025 14:33

Navigation

Documents

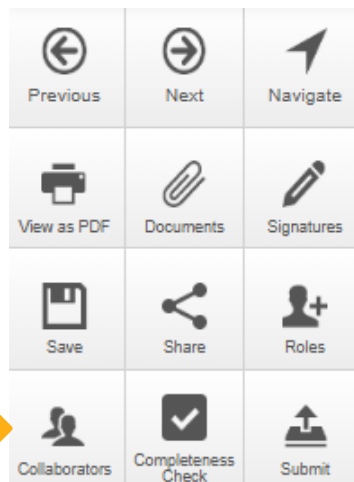
Collaborators

Submissions

Centre

History

Collaborators



Clicking either of these links will present you with a list of all collaborators currently listed on the project, along with related information.

You are also able to Edit Permissions from this list (without having to go into the form).

Click **Edit Permissions** and you will be presented with a dialog box, enabling you to edit that collaborator's access level.

Navigation	Documents	Signatures	Collaborators	Submissions	Correspondence	Centre	History
Collaborators							
Name	Access	Edit Permissions					
Ms Beren Avci	Project Owner and Form Owner	Edit Permissions					
Ms. Roxanne Noronha	Read, Write, Submit, Share, Create all sub forms, Receive notifications	Edit Permissions					

3.5. Signatures

Once an application form is completed, it requires signatures before it can be submitted. You can view all active and pending signatures in the currently selected application form by clicking the **Signatures tab** from the application form home page or by clicking the **Signatures tile** within a section of the application form:

Project

Create Sub Form

Share

Roles

Completeness Check

Submit

View as PDF

Study Title Here0238

Project Tree

Study Title Here

Main Application Form - Prospective

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	14/Jan/2025 14:33

Navigation

Signatures

Collaborators

Submissions

Centre

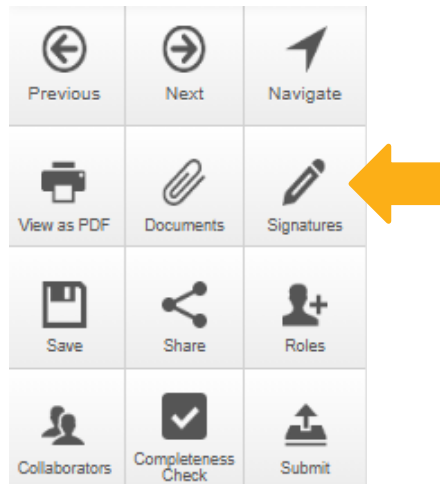
History

Signatures

Note: There are no active signatures on this form

Signature Requests

Note: There are not any requests pending on this form



Clicking either of these links will present you with all active signatures on this form and all pending signature requests on this form.



Signatures



Type Signatory Email Signed Date Validity

Signatures are sorted by the following columns:

- **Type** – Displays the role of the signatory
- **Signatory Email** – Displays the email of the person who signed the form
- **Signed Date** – Displays the date the person signed the form
- **Validity** – All signatures will be labelled as valid and will lock the form to prevent further changes. Once a form is unlocked to make modifications, any previous signatures will be invalidated and will be labelled as invalid

3.5.1. Requesting a Signature


If you are a study staff member who has completed the application form but does not have signing authority, you can request the signature of the appropriate individual by clicking the **'Request Signature'** button.

[Request Signature](#)

This will bring up a pop-up window where signature recipient's email address can be entered, along with an optional message. Click the **'Request'** button to complete the signature request.

Request a signature

Enter the email address of the person you want to sign this form



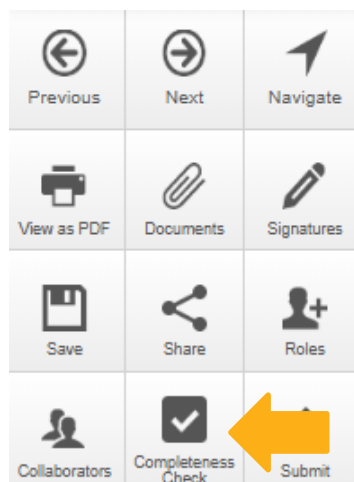
The person from whom you are requesting the signature will receive a notification email, and a SHORES notification on the project.

For more information about how to Sign an Application, review the:
SHORES Applicant – QuickGuide: Signing an Application

3.6. Submitting an Application

When the application is complete, to submit the application, you must click the '**Submit**' tile and the system will check the form for completeness.

***NOTE:** You can also check for completeness by clicking '**Completeness Check**' next to '**Submit**'.



Completeness Check



Loading...: Checking form is complete...

Close

All unanswered mandatory questions will be highlighted by the system. Clicking an unanswered question link will direct you to that question within the application form.

Completeness Check



Incomplete: Please complete the following questions

- 2A. Full Study Title
- 2D. Expected start date at this institution:
- 2E. Total study duration at this institution:
- 2F. [Is this protocol directly related to a previously approved study at this institution \(e.g., extension, rollover, subsequent to a pilot study\)?](#)
- 3A. Principal Investigator Title
- 3A. Principal Investigator First Name
- 3A. Principal Investigator Surname/Last Name
- 3A. Principal Investigator Organisation/Institution
- 3A. Principal Investigator Department
- 3A. Principal Investigator Address
- 3A. Principal Investigator City
- 3A. Principal Investigator Email
- 3B. Is the Principal Investigator a member of staff?
- Study Coordinator/contact person for this application if not the principal investigator (e.g. study coordinator, research administrative contact, research student, institutional liaison). Title
- Study Coordinator/contact person for this application if not the principal investigator (e.g. study coordinator, research administrative contact, research student,

Close

If the form passes the completeness test, clicking the blue '**Submit**' button will submit the form to the REB.

Submit



Complete: Your form is complete and ready to submit



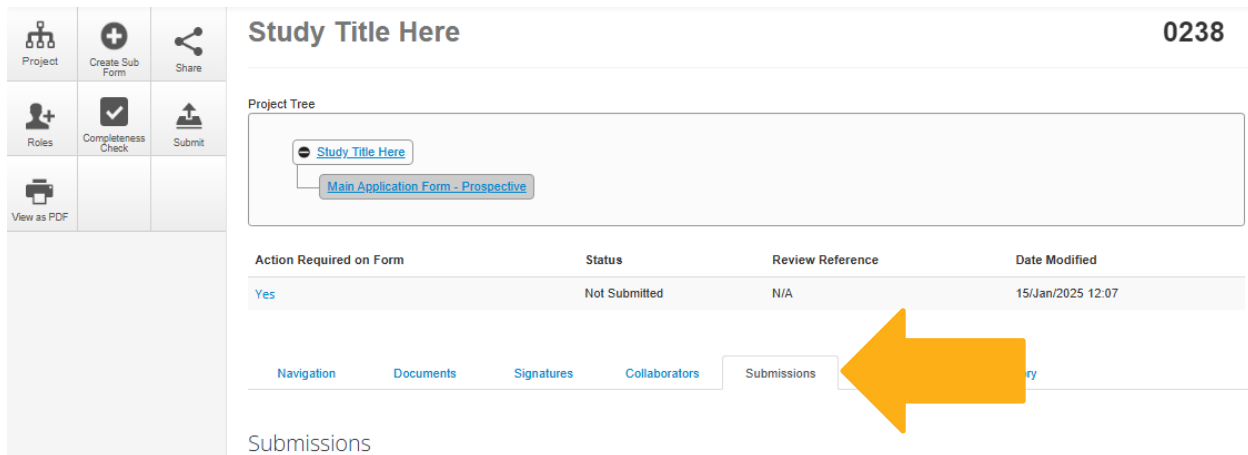
Submit

Close

Once the form has been successfully submitted, you will be presented with a confirmation screen. Press the Home button to return to the Work Area.

3.7. Submissions

The **Submissions** tab can be found on the main page of the currently selected application form.



The screenshot shows the SHORES interface. On the left is a sidebar with icons for Project, Create Sub Form, Share, Roles, Completeness Check, Submit, and View as PDF. The main header displays 'Study Title Here' and the ID '0238'. Below the header is a 'Project Tree' showing a hierarchy with 'Study Title Here' and 'Main Application Form - Prospective'. A table below lists submission details:

Action Required on Form	Status	Review Reference	Date Modified
Yes	Not Submitted	N/A	15/Jan/2025 12:07

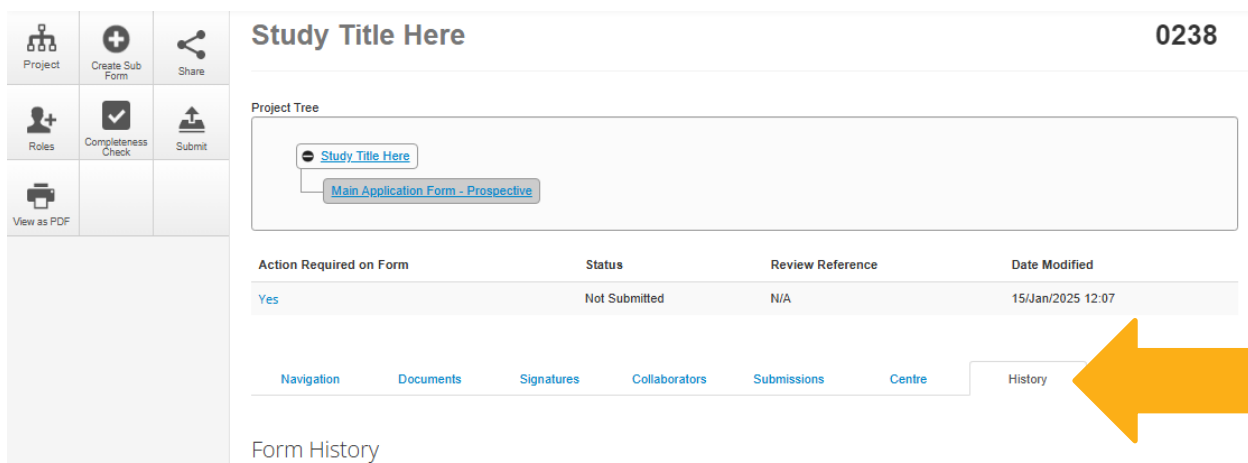
At the bottom, a navigation bar includes tabs for Navigation, Documents, Signatures, Collaborators, Submissions, and History. The 'Submissions' tab is highlighted with a yellow arrow.

Clicking the **Submission** tab will bring up a list of all previous submissions of the currently selected application form. Every time an application is submitted to the REB, a PDF snapshot is taken and a record of the submission is stored under the Submissions tab. When an application form is resubmitted to the REB due to required recommendations, previous submissions are archived. All Submissions can be downloaded in a PDF format.

For more information about how to Respond to Recommendations, review the: **SHORES Applicant – QuickGuide: Responding to Recommendations**

3.8. History

The **History** tab can be found on the main page of the currently selected application form.



This screenshot shows the SHORES interface with the 'History' tab highlighted in the navigation bar by a yellow arrow. The layout is identical to the previous screenshot, but the 'History' tab is selected instead of 'Submissions'.

Clicking the **History** tab will open a complete listing of events that have occurred for the selected application form. This includes signatures, submissions, and status changes

throughout the REB review process. Certain historical actions will also have an accompanying attachment that can be downloaded in PDF format.

For more information about how to Find an Approval Letter, review the: **SHORES Applicant – QuickGuide: Finding Approval Letters**

4. COMPLETING AN APPLICATION FORM

4.1. Smart Questions

The application forms used in SHORES are composed of smart questions. Depending on the answers you provide, certain questions may become available or remain hidden as they are not required. As you progress through the forms, you may notice the questions are not numbered sequentially. This is a result of smart question functionality.

***NOTE:** It is therefore advised to complete the form in order of how the questions apply. Skipping ahead may result in entering a response that is not needed, or in not entering enough information.

4.2. Comments

Any user who has access to the application forms can add **comments** to other users. To add a comment, click on the icon highlighted in the picture below:

Application Type



You will be presented with all the comments related to that question. There is also a field where you can enter additional comments. By clicking the **'Add New Comment'** button, the comment will be saved to the system.

Comments



Comment

Date Added Owner

Comments here

Wednesday, January
15, 2025 at 12:32
PM

You

Edit

Delete

Add New Comment



Add new comment



Save

Cancel

***NOTE:** Only the person who adds the comments can edit and delete the comment and comments are not submitted to the REB with the application.

4.3. Help Text

Some questions within SHORES have associated **help** texts. To view the help text click on the icon indicated below:

7. Department/Division/Program Head Approver Details



The help text will appear in a pop-up window. To close the help text, click anywhere outside the pop-up window.

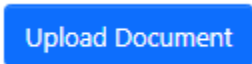
4.4. Mandatory Questions

Most questions are mandatory questions and require an answer in order to sign and submit the application.

4.5. Documents Upload

You can upload documents by clicking the blue '**Upload Document**' button associated within certain questions.


***NOTE:** More opportunities to upload documents will appear as you complete the form.



You can browse your computer for a file to upload. All major file types are supported, including Word documents, Excel documents, text files and PDFs.

Documents - Default

Please attach your Default here:

Document Name	Version Date	Version
<input type="text" value="Study Protocol 01JAN2025.docx"/>  <input type="button" value="Browse"/>	<input type="text" value="01/Jan/2025"/>	<input type="text" value="1"/> <input type="button" value="Upload"/>

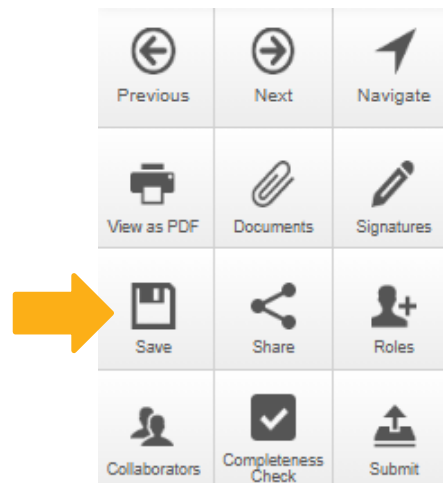
All documents should be uploaded with a proper name (the file name) that will help the REB in identifying it.

***NOTE:** Do not add any underscores or special characters into the document file name.

Once you have selected the file and inputted the Document Version Date and Version Number, to complete the upload process, click the '**Upload**' button.

4.6. Save

You can save your progress at any time by clicking the **Save** tile in the **Actions Toolbar**. Your progress will also automatically save as you navigate from one page to the next. It is also recommended to save your work periodically as the system can



automatically time out, which may result in a loss of information already entered.

ACKNOWLEDGEMENT:

We acknowledge and thank the University of Western Ontario Research Ethics Board for generously sharing and allowing the use of their educational materials, upon which our guides are largely based.