Sinai Health Online Research Ethics System (SHORES) Applicant

Online User Guide: Getting Started

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1. ABOUT SHORES

The new system was purchased from Infonetica Ltd., which specializes in research management, ethics management, ethics approval and compliance training solutions. The system we are calling Sinai Health Online Research Ethics System (SHORES) is a web-based electronic platform for conducting research ethics reviews and is built using modern infrastructure that exhibits a vast set of features, while maintaining an easy-to-use interface.

Since 2016, the Sinai Health REB has used this system for multi-centre clinical trial studies submitted through Clinical Trials Ontario (CTO), for which Sinai Health REB acts as the REB of record. CTO's system, CTO Stream, has been developed in partnership with Infonetica. This continued relationship ensures SHORES and CTO Stream will be continuously monitored and maintained to meet the needs of researchers and REBs.

1.1. Target Audience

This guide is intended for all SHORES Users and will provide useful information on how to create an account and navigate the online application system.

1.2. Internet Settings

SHORES supports the latest versions of the following browsers:

- Microsoft Edge
- Mozilla Firefox
- Google Chrome
- Apple's Safari

SHORES uses pop-ups. You will need to configure your browser to ensure SHORES's pop-ups are allowed.

1.3. Technical Support

Email – REB.Office@sinaihealth.ca
Phone – 416-586-4875

2. GETTING STARTED

2.1. Access the System

- SHORES Applicant Site - https://apply.sinaihealthreb.ca

2.2. Internal User Account

A SHORES account will be automatically generated for all Sinai Health members (including both @sinaihealth.ca and @lunenfeld.ca domains) as Internal Users. Sinai Health members will use their organization login credentials (i.e., username and password) to access SHORES.

2.3. External User Account

If you **do not** have any active submissions with the Sinai REB and this is your first time using SHORES, you will need to have an account created for you. To do this, email REB.Office@sinaihealth.ca to place an account request. When requesting a SHORES account please provide the following information:

- Title
- First Name
- Last Name
- Institution
- Department
- Division
- Qualifications
- Street Address & Room/Suite Number
- City
- Province
- Postal Code
- Country
- Telephone Number
- Fax Number

Please ensure the information provided is complete and accurate as it is used for fields within the project application forms. The Sinai Health REB Administrative Coordinator will generate a new SHORES account and send you an email with your temporary password.

> ***NOTE:** Only university, hospital and affiliated institution-approved emails can be used for this system.

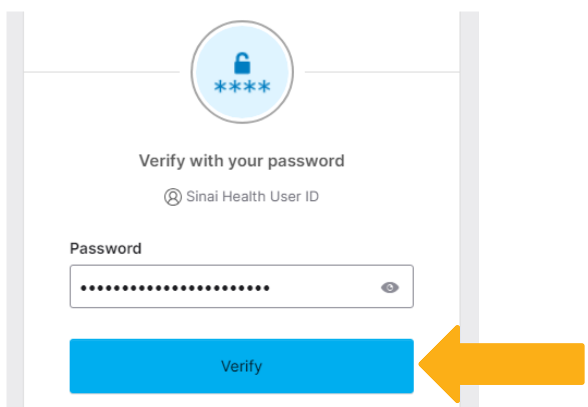
If you have active submissions with the Sinai REB and this is your first time using SHORES, please see Section 2.5 below on how to login as an external user.

2.4. How to Log In: Internal

On the SHORES Applicant landing page click ‘**Internal User’**. This will open a log in page in a new browser tab.

In the log in page enter your Sinai Health/LTRI User ID and click ‘**Next**’.

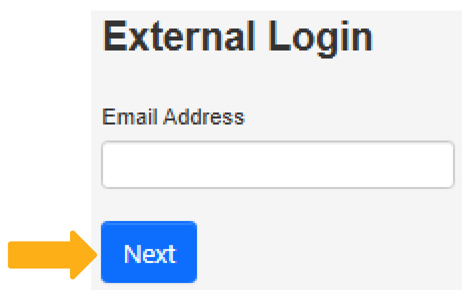
In the next page, enter you Sinai Health/LTRI Password and click ‘**Verify**’. Note that SHORES is a part of the Sinai Health single sign-on environment and as such when you change the password for your Sinai Health/LTRI User ID elsewhere you will need to use your new password to access SHORES.



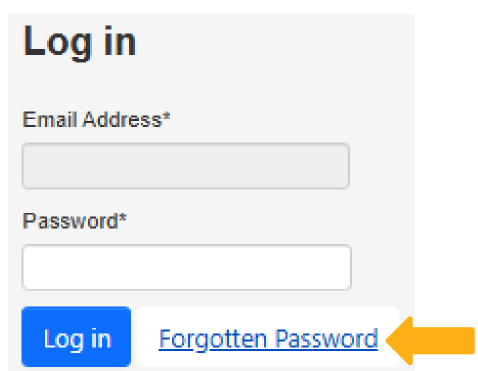
2.5. How to Log In: External

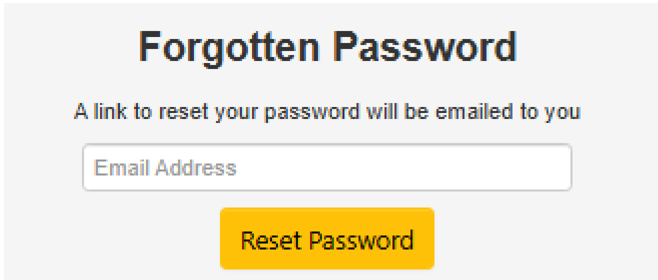
On the SHORES Applicant landing page click ‘**External User**’. This will open a log in page in a new browser tab.

In the log in page enter your email address used to request your SHORES account and click ‘**Next**’.



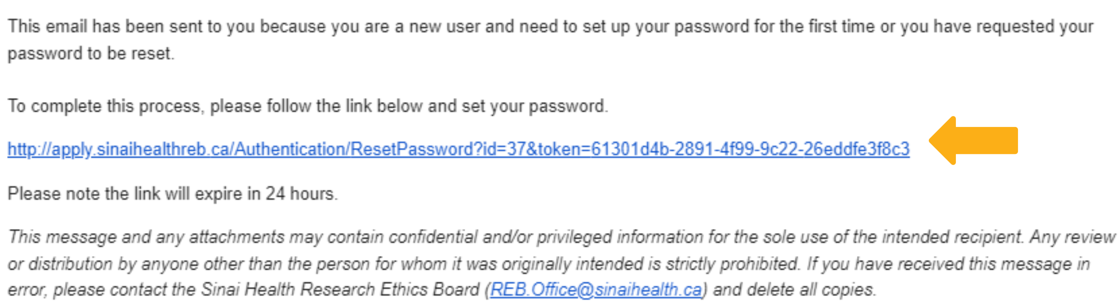
In the next page, for your first time accessing the system, click ‘**Forgotten Password**’.





Enter your email address and click ‘**Reset Password**’.

You will receive an email from ‘donotreply@infonetica.net’ to reset your password. This email is typically sent immediately; check your spam folder if you don’t see anything in your inbox. Follow the link within the password reset email.



This email has been sent to you because you are a new user and need to set up your password for the first time or you have requested your password to be reset.

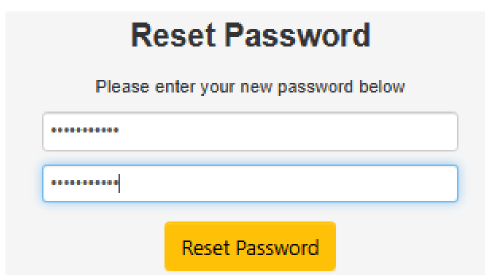
To complete this process, please follow the link below and set your password.

http://apply.sinaihealthreb.ca/Authentication/ResetPassword?id=37&token=61301d4b-2891-4f99-9c22-26eddfe3f8c3

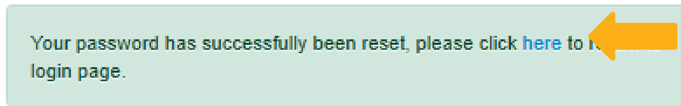
Please note the link will expire in 24 hours.

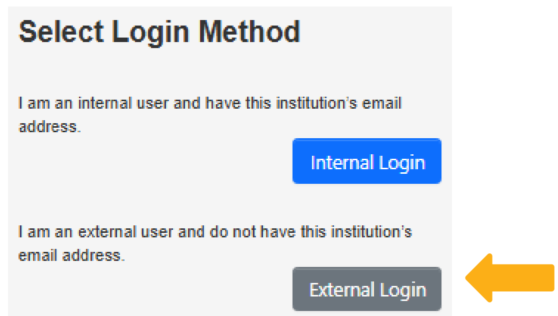
This message and any attachments may contain confidential and/or privileged information for the sole use of the intended recipient. Any review or distribution by anyone other than the person for whom it was originally intended is strictly prohibited. If you have received this message in error, please contact the Sinai Health Research Ethics Board (REB.Office@sinaihealth.ca) and delete all copies.

Create a new password for your SHORES account. Passwords must be 10+ characters long, contain both upper and lowercase characters, and contain at least one special character and one number. Then click ‘**Reset Password**’.



After resetting, return to the log in page and use the '**External Login**' to enter your email and new password to log in to SHORES.

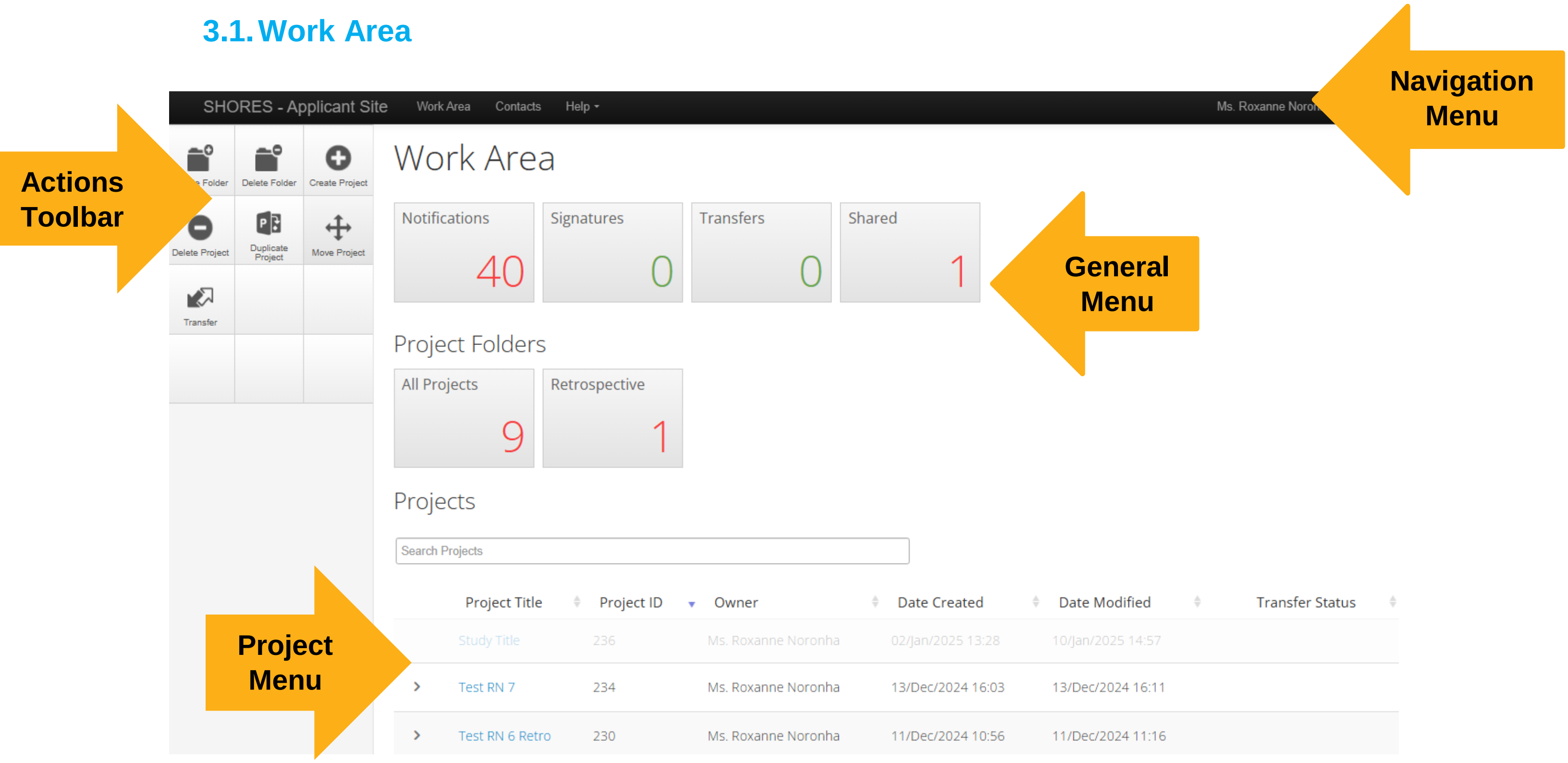




3. NAVIGATING THE SHORES SYSTEM

Upon logging into SHORES, you will be directed to the **Work Area**. The Work Area is your home page where you will create new projects and find all current pending notifications.

3.1. Work Area



3.2. Navigation Menu

The **Navigation Menu** will always be visible at the top of the page no matter where you are in the system, and includes links to:

1. **Work Area** – takes you to the Work Area/home page
2. **Contacts** – takes you to the Contacts page. For more information, please refer to section 3.3
3. **Help** – The Help bar links to:
    a. **Contact Information –** Provides contact information for the Sinai Health Research Ethics Board Office
    b. **Help** – Provides training materials for quick reference
    c. **FAQ** – Links to Frequently Asked Questions
    d. **Templates** – Links to REB Guidance Templates
    e. **About** – Provides information about Sinai Health's REB

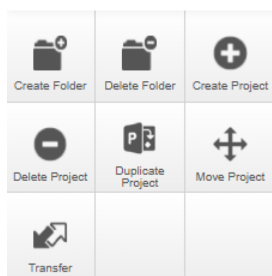
4. **Account Settings** – clicking on your name on the right-hand side of the Navigation Menu allows you to:
    a. **Personal Details** – Update personal information such as contact details
    b. **Notifications** – Go to Notifications tile. For more information refer to section 3.5.1
    c. **Logout** – Log out of the SHORES Applicant site

3.3. Contacts

This page lists all of the contacts you have saved to your personal address book in SHORES.

3.4. Actions Toolbar

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.



3.4.1. Create Folder

Creating folders will help you easily organize your applications within SHORES. Whether you are working with several PIs, many research students or just simply want to organize between Full Board and Delegated, you can use the **Create Folder** function to do this.

1. In the Home Work Area click the '**Create Folder**' tile
2. Add a folder title (no more than 40 characters)
3. Click '**Create**'
4. Drag and drop the files from your list of Projects into the folder

3.4.2. Move Projects between Folders

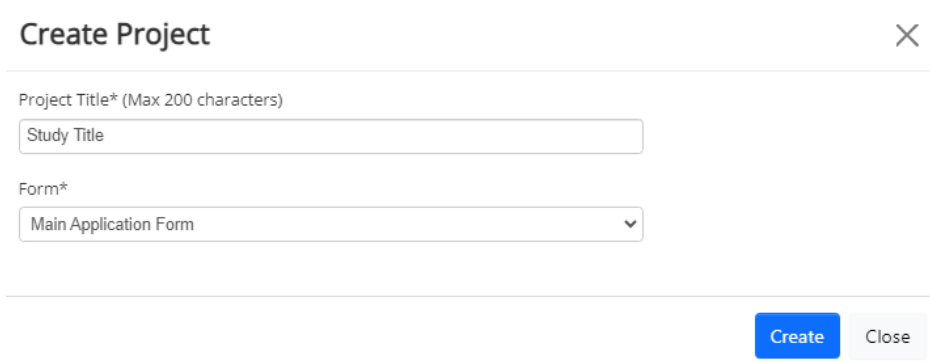
1. To move files out of a folder, click on the folder tile on the Home Work Area
2. Click the ‘**Move Project**’ tile and select the Project and Destination you wish for that file to move
3. Click ‘**Move**’

3.4.3. Delete Folder

1. Once the folder is empty (see section 3.4.2 on how to “Move” a project), you can delete the folder
2. From the Home Work Area page, click on the ‘**Delete Folder**’ tile
3. Select the folder you wish to delete
4. Click ‘**Delete**’ and confirm with ‘**Yes**’

3.4.4. Create Project

Clicking the ‘**Create Project**’ tile will bring up the Create Project dialog box.



a.) Project Title
- Enter your short title (fewer than 200 characters). This title will be used to access your file from the **Project Menu**, so ensure it is something unique.

b.) Form
- Select Main Application Form

For more information about how to Create a Project, review the**:**
SHORES Applicant – QuickGuide: Creating a New Project

3.4.5. Delete Project

Clicking the ‘**Delete Project’** tile in the Action Toolbar will bring up the Delete Project dialog box.

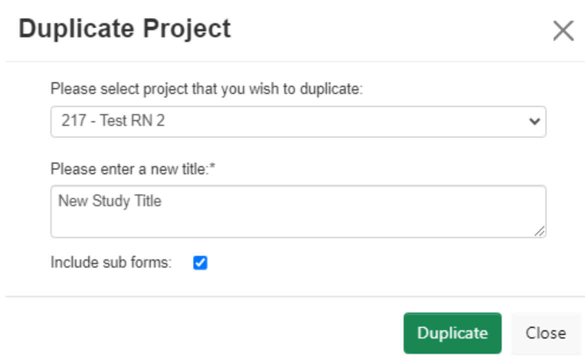
1. Select from the drop-down list the project you want to delete and click the '**Delete**' button.

   ***NOTE:** Projects that have been submitted for review cannot be deleted.

3.4.6. Duplicate Project

Clicking the '**Duplicate Project'** tile will bring up the Duplicate Project dialog box.

1. Select the project from the drop-down list you want to duplicate
2. Enter a new short title for the study
3. Click 'Include Sub Forms' checkbox if you want to duplicate the sub forms from the existing project to the new project
4. Click the '**Duplicate**' button.
5. The duplicated project will appear in your Projects Menu.



***NOTE:** Duplicating a project will create an exact replica of the project applications but excludes any documents uploaded in the original project (e.g., protocols, consent forms, etc.). If the **'Duplicate Project'** tile is used to create a new yet similar project, the duplicated project application should be edited throughout to ensure the application provides study specific information.

3.4.7. Transfer Project

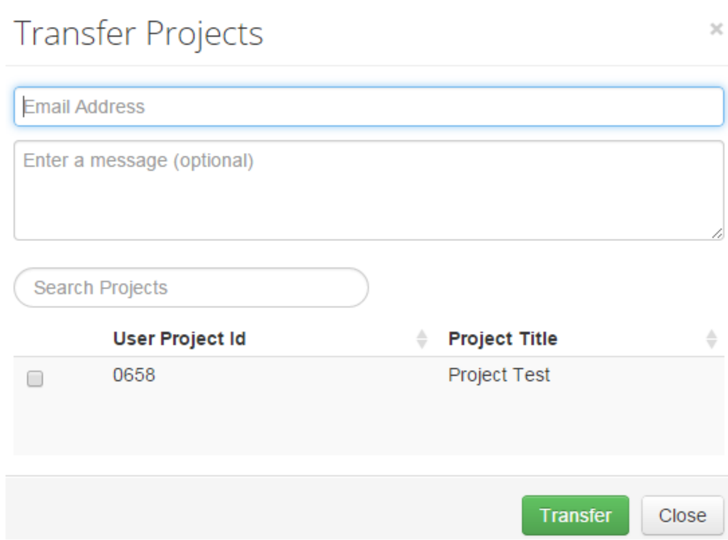
SHORES facilitates transferring the ownership of a project from one person to another. Only the current **Project Owner/Form Owner** (the user who created the project) has the ability to initiate a transfer.

Once the project is transferred to another individual, it will no longer be listed on your project list and you will no longer have access to it unless the new owner shares the project with you.

Clicking the '**Transfer**' tile will bring up the Transfer Projects dialog box.

1. Input the email address of the person to whom you are transferring the project. You can also enter a message to accompany the transfer.

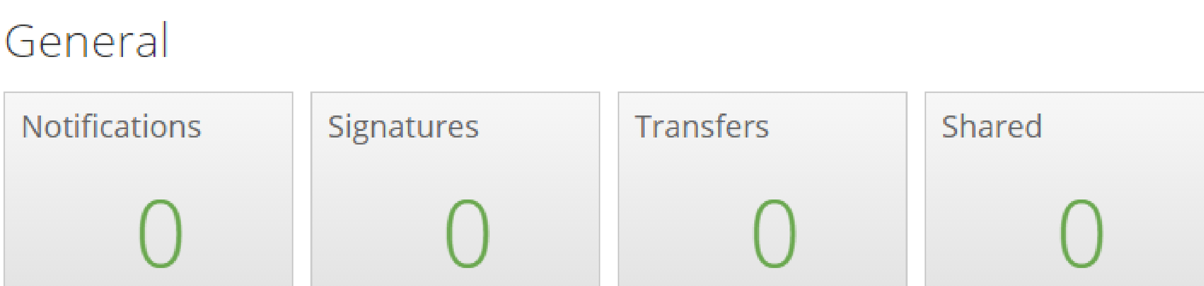
2. Select the project you want to transfer from the list by clicking on the checkbox next to the User Project ID, or search for the project you want to transfer



3. Once the transfer request is complete, the transfer recipient will receive a notification through SHORES and to their personal email. The transfer recipient can then accept or reject the transfer.

3.5. General Menu

The **General Menu** is the main hub for all notifications and is based on four distinct categories. The number listed in the corresponding tile is the number of unread notifications.

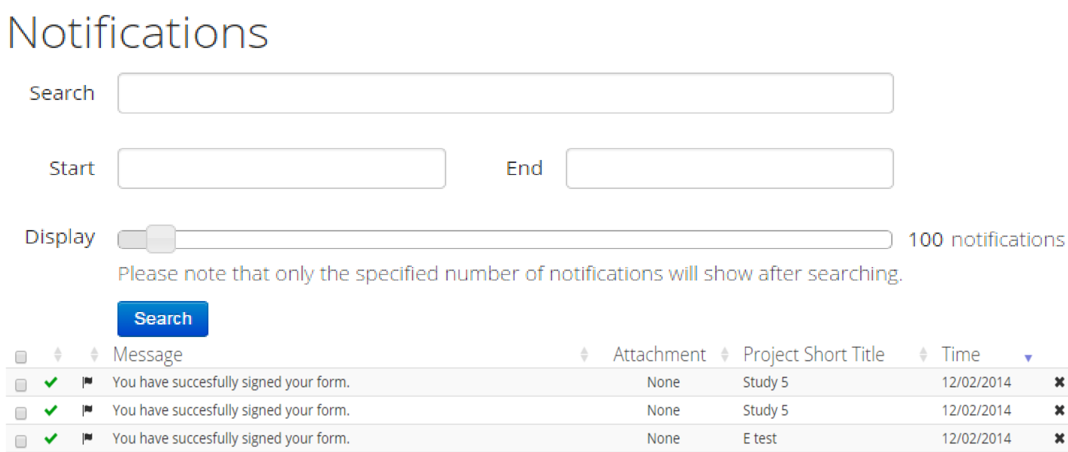


The General Menu tiles will only appear on the Work Area/Home page.

3.5.1. Notifications

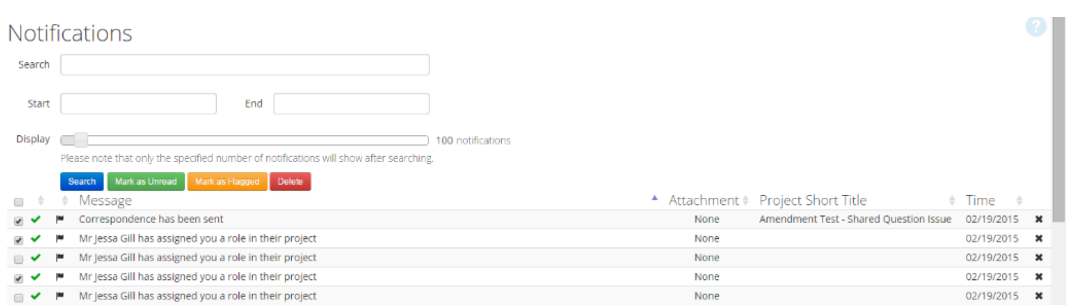
Users will receive notifications whenever an event occurs on an application form within a Project. Clicking the **Notification** tile will bring you to the Notifications page, which is like an email inbox.

1. You can search through the available notifications by keywords
2. You can search through the available notifications by start and end date
3. The display slider can be used to change the number of notifications returned as results once a search is completed



4. The check box to the left of each message can be used to select one or more messages at one time. You can select all messages at once by clicking the check box at the top left-hand side of the page.
5. Selected messages can be marked as unread, marked as flagged, or deleted.
    - Delete a single notification using the X on the right side
    - Delete multiple notifications by clicking the boxes on the right and selecting an action

      ***NOTE:** Deleted notifications cannot be recovered.



3.5.2. Signatures

Clicking the **Signatures** tile will bring you to the Signatures page. Here, users can view Signatures that have been collected on the form, or Signature Requests, along with the status of the Signature or Signature Request (Valid, Invalid or Requested).

Signatures

Search signatures

Type	Project Title	Project ID	Requesting User	Message	Requested Date	Response Date	Status	Action
Department/Division/Program Head	BA Test 9	235	Ms Beren Avci		02/Jan/2025 11:50	02/Jan/2025 11:56	Signed	View PDF
Department/Division/Program Head	Test BA 8	233	Ms Beren Avci		12/Dec/2024 14:22	12/Dec/2024 14:23	Signed	View PDF
Department/Division/Program Head	Test BA 6	228	Ms Beren Avci		09/Dec/2024 15:37	09/Dec/2024 15:41	Signed	View PDF
Principal Investigator	Test acronym	226	Ms Beren Avci		06/Dec/2024 11:06		Invalidated	View Form

You can search through your pending and previous signature requests using the following criteria: Project Title, Requesting User Name and Requested Date.

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

3.5.3. Transfers

Clicking the **Transfers** tile will bring you to the Transfers page. You can search through the pending/completed transfer requests using the following criteria: Transfer ID, Project Title, User Name and Date.

Transfers

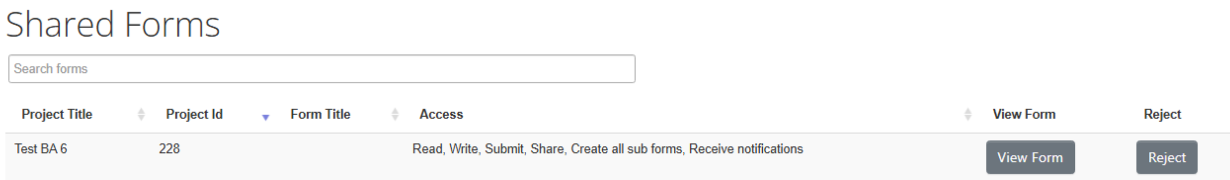
Search Transfers

Transfer Id	Project Title	From User	To User	Message	Requested Date	Response Date	Status	Action

3.5.4. Shared

Clicking the **Shared** tile will bring you to the Shared Forms page. You will be presented with a list of forms that have been shared with you, along with related information.

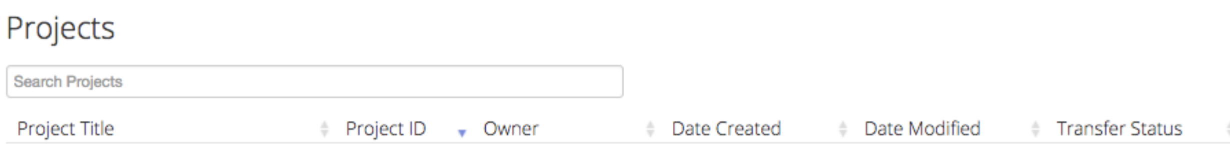
***NOTE:** These projects will only be ones that have been shared with you as an team member.



To view the form that has been shared with you, click the '**View Form**' button. The share can be rejected should you no longer wish to be a collaborator on an application form. Shared projects will also be available under the Project Menu in the Work Area.

3.6. 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.



> For more information about how to Manage Migrated Projects, review the**:**
> **SHORES Applicant – QuickGuide: Managing Migrated Projects**

ACKNOWLEDGEMENT:

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