QuickGuide: Adding and Removing Study Team Members

When a user creates a new project in SHORES they become the '**Project Owner**' and have **exclusive** access to the project and all of the forms within.

In order for other members of the study team (including the Principal Investigator), to access the application forms in the project, they must be given a role by the Project Owner or have the form shared with them by the Project Owner.

A **role** assigns a pre-set selection of permissions to the individual. Roles must be assigned at the level of the Main Application Form (or Legacy Application) and will apply to all sub-forms. Roles available include Principal Investigator, Co-Investigator and Coordinator. Please note if the Project Owner is also the Principal Investigator, the role of Principal Investigator does not need to be assigned.

Using the **share** feature allows a specific form to be shared with an individual, and allows the user to determine what permissions that individual is assigned.

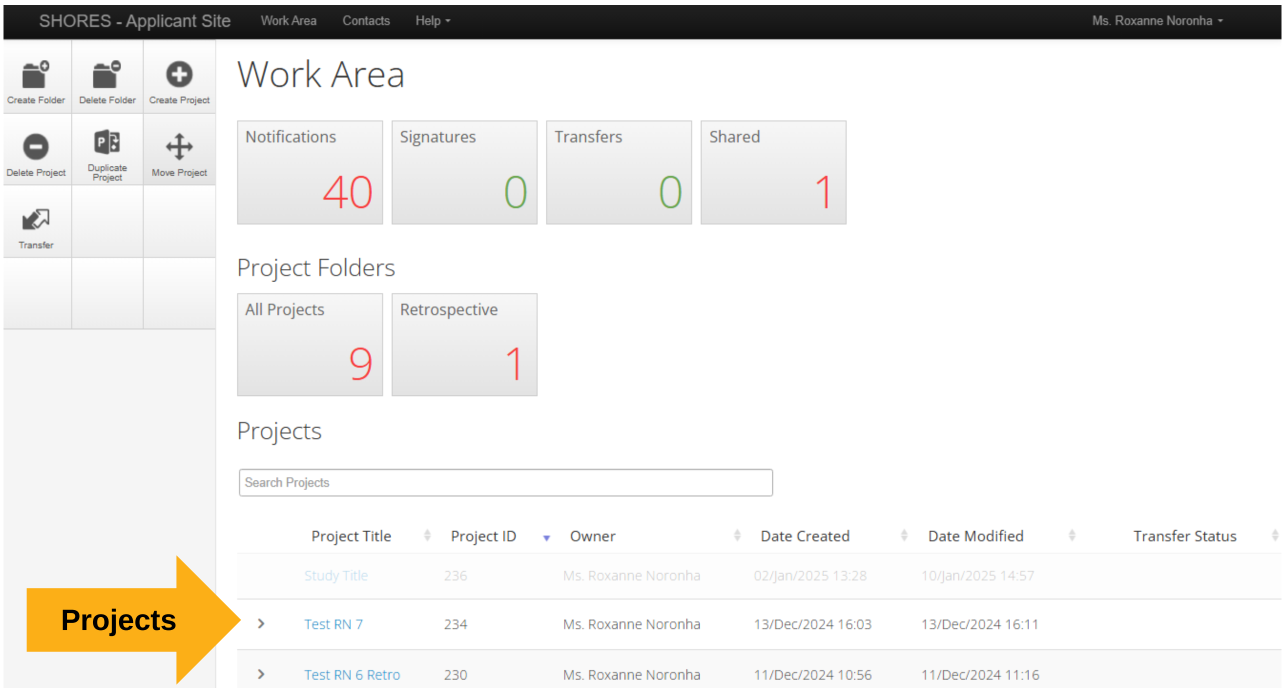
> ***NOTE**: This guide only refers to the steps required to share SHORES application forms with team members. Only sharing a SHORES form with personnel does not mean they are listed as study personnel with the REB. In order for the personnel to be listed as study personnel on the REB file they must be either (a) listed as a study team member on the Main Application form, or (b) added to the file via a Study Personnel Change Amendment form.

To learn how to submit an Amendment, review the: **SHORES Applicant – QuickGuide: Creating a Sub-Form**

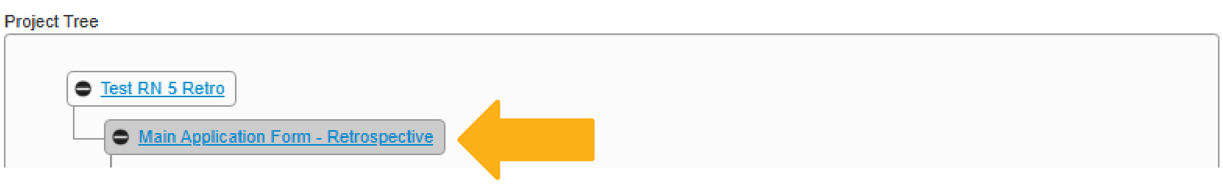
<u>To assign a Study Team Member a Role on a project:</u>

1. Log in to SHORES - https://apply.sinaihealthreb.ca

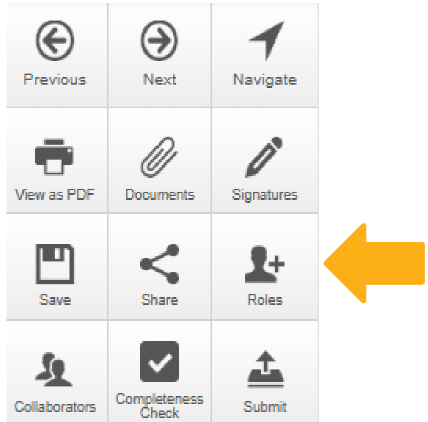
2. Click on the project you wish to update from the **Project Menu** at the bottom of the screen.



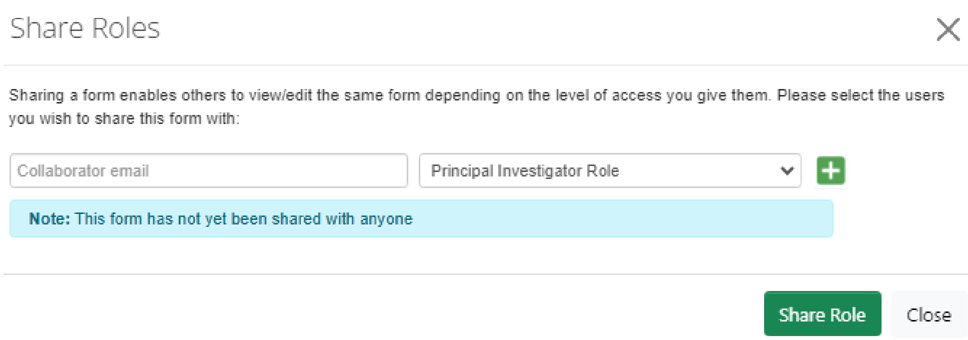
3. Make sure that the application you wish to update is highlighted in grey in the **Project tree.** Note that Roles may only be assigned at the level of the Main Application Form or Legacy Application and will then apply to all sub-forms.



4. Click on the **Roles** tile in the **Actions Toolbar** on the left hand side of the screen.



5. Enter the email address of the study team member into the ‘Collaborator Email’ field. Choose the appropriate Role for that person by clicking the dropdown menu beside their email address. Click **‘Share Role’.**

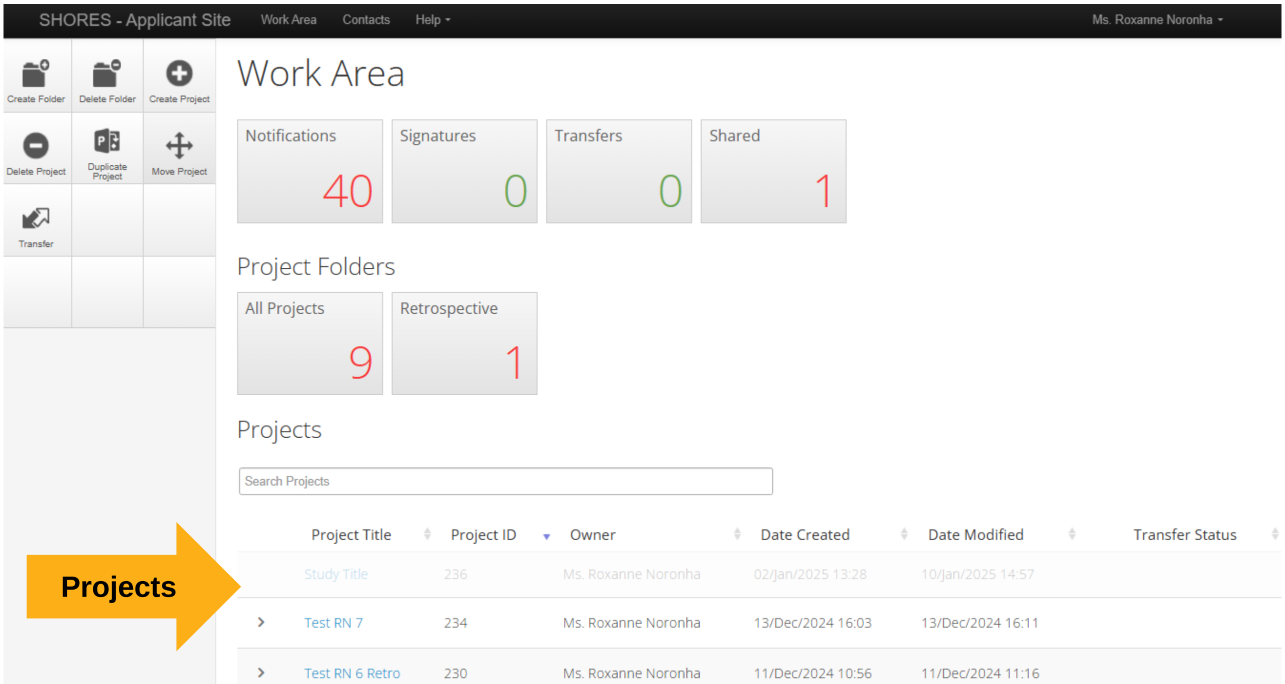


***NOTE**: The individual selected to have the Principal Investigator Role must match the study PI identified in the Main Application Form or Legacy Application. Only one individual should be given the PI role per study. The PI role allows an individual all project and form privileges (read, write, create sub forms, etc.).
***NOTE**: The email address will need to match the email address used for their SHORES account.

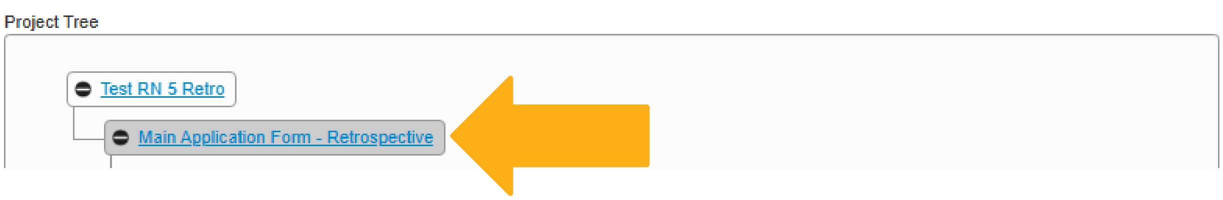
<u>To share forms with Study Team Members or other Collaborators:</u>

1. Log in to SHORES - https://apply.sinaihealthreb.ca

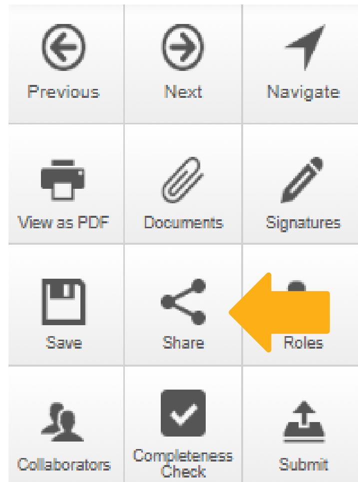
2. Click on the project you wish to update from the **Project Menu** at the bottom of the screen.



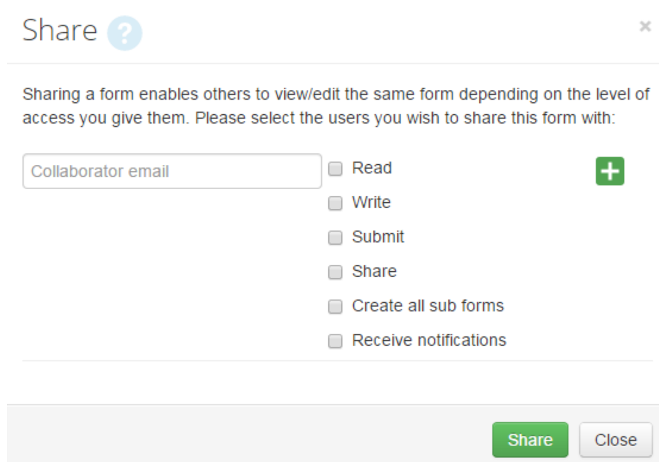
3. Make sure that the application you wish to update is highlighted in grey in the **Project tree.**



4. Click on the **Share** tile in the **Actions Toolbar** on the left hand side of the screen.



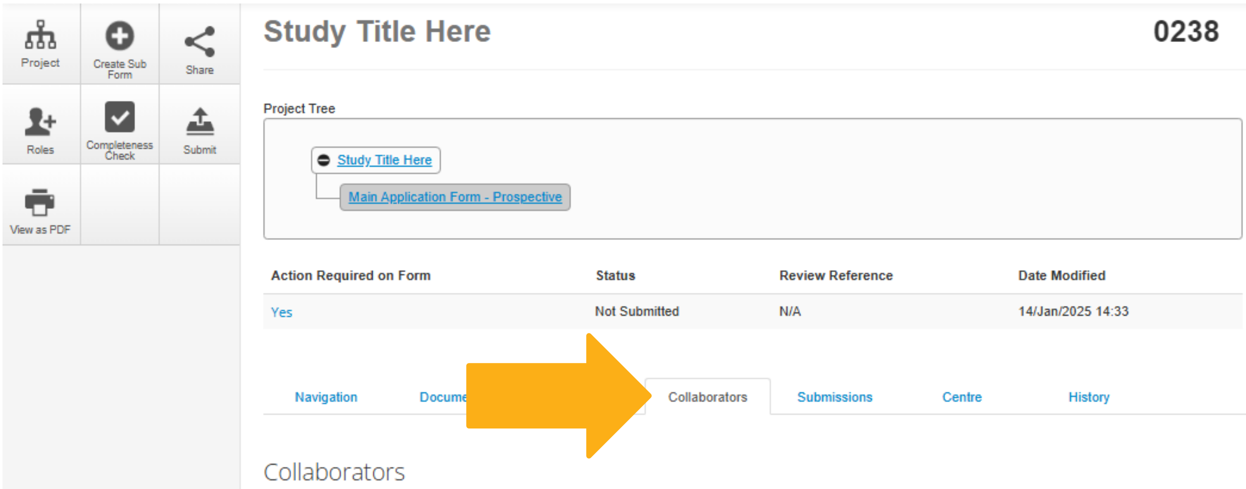
5. Enter the email address of the Collaborator into the ‘Collaborator Email’ field. Select the sharing options from the checkboxes and click ‘**Share**’. Learn more about the sharing options in the **Online User Guide: Application Features**.

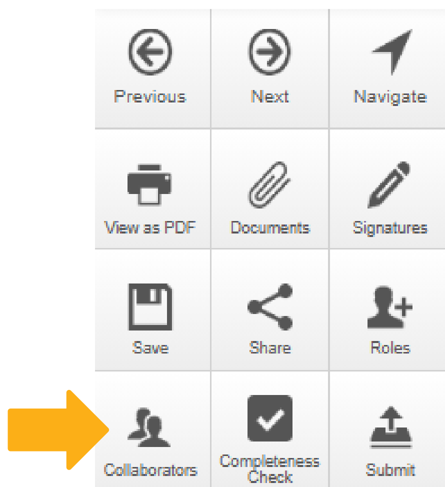


***NOTE**: The Share action only shares the form selected. It will not share other forms associated with the project.

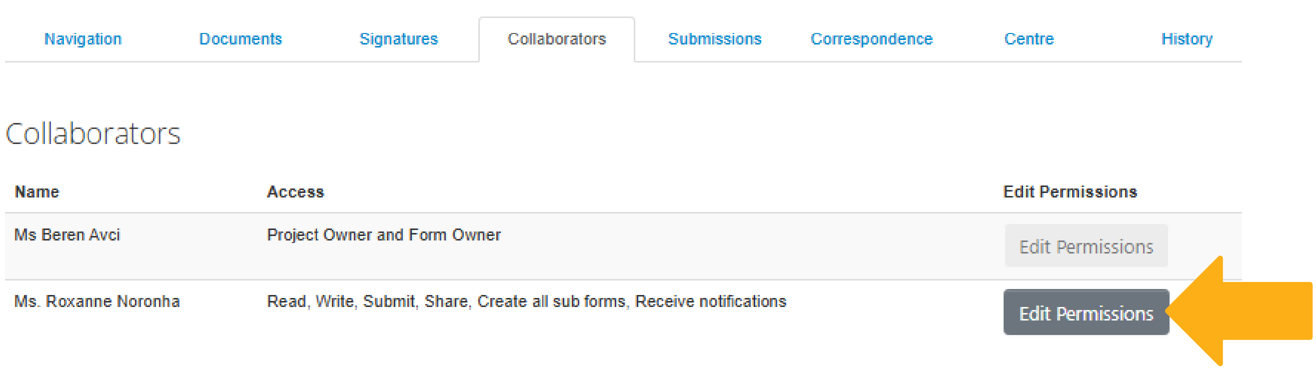
<u>To remove a study team member from a form:</u>

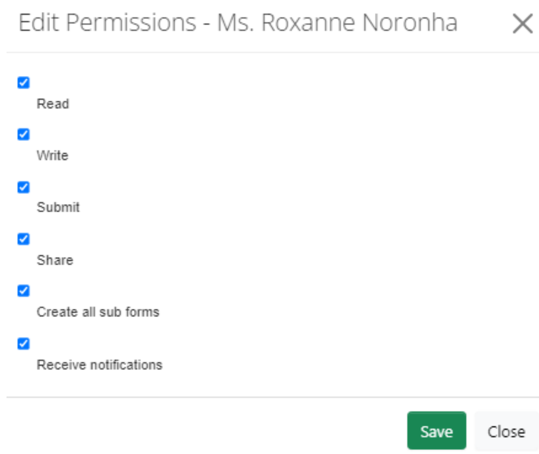
1. View a list of all personnel in the currently selected application form by clicking the **Collaborators tab** from the application form home page **<u>or</u>** by clicking the **Collaborators tile** within a section of the application form:





2. Clicking either of these links will present you with a list of all collaborators currently listed on the form, along with related information.
3. Click **Edit Permissions** and you will be presented with a dialog box, enabling you to edit that team member's access level.





***NOTE:** if the team member who is leaving is the Project Owner, you must transfer form ownership prior to their departure using the “Transfer” action tile on your main landing page in SHORES. Learn how to use the Transfer action in **Online User Guide: Getting Started**.

Questions?
T: 416-586-4875
E: REB.Office@sinaihealth.ca