



Sinai Health Online Research Ethics System

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



SHORES Sinai Health Online Research Ethics System

To assign a Study Team Member a Role on a project:

- 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.

SHC	RES - Ap	plicant Si	te Work Area Contacts	Help -				Ms. R	oxanne Noronha 👻
Create Folder	Delete Folder	Create Project	Work Area	а					
0	P t	÷	Notifications	Signatures	Transfers	Shared			
Delete Project	Duplicate Project	Move Project	40	0	0	1			
Transfer			Project Folders	5					
			All Projects	Retrospective					
			9	1					
			Projects						
			Search Projects						
			Project Title	Project ID	• Owner	Date Created	Date Modified	¢	Transfer Status 🕴
_									
F	Projec	ts	> Test RN 7	234	Ms. Roxanne Noronha	13/Dec/2024 16:03	13/Dec/2024 16:11		
			> Test RN 6 Retr	o 230	Ms. Roxanne Noronha	11/Dec/2024 10:56	11/Dec/2024 11:16		

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.

Project Tree	
Test RN 5 Retro Main Application Form - Retrospective	

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





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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'**.

naring a form enables others to view	v/edit the same form depe	ending on the level of access yo	ou give them. Please se	lect the users
Collaborator email	Prin	cipal Investigator Role	~ +	
Note: This form has not yet been	shared with anyone			

***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.

To share forms with Study Team Members or other Collaborators:

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.

SHC	RES - Ap	plicant Si	te Work Area Contac	zts Help -				Ms. Roxanne Noronha 🕶
Create Folder	Delete Folder	Create Project	Work Are	ea				
0	P +	÷	Notifications	Signatures	Transfers	Shared		
Delete Project	Duplicate Project	Move Project	40	0	0	1		
Transfer			Project Folde	rs				
			All Projects	Retrospective				
			9	1				
			Projects					
			Search Projects					
			Project Tit	ie 🔶 Project ID	 Owner 	Date Created	Date Modified	🕴 🛛 Transfer Status 🛛 🕴
F	Projec	ts	Study Title					
	•		> Test RN 7	234	Ms. Roxanne Noronha	13/Dec/2024 16:0	3 13/Dec/2024 16:11	
			> Test RN 6 R	etro 230	Ms. Roxanne Noronha	11/Dec/2024 10:50	5 11/Dec/2024 11:16	

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

Project Tree	
Test RN 5 Retro	
<u>Main Application Form - Retrospective</u>	
	·

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





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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**.

Sharing a form enables others to view/en	dit the same forms down diver an the local of
access you give them. Please select the	users you wish to share this form with:
Collaborator email	Read +
	Write
	Submit
	Share
	Create all sub forms
	Receive notifications

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

To remove a study team member from a form:

 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:





Project	Create Sub	Share	Study Title H	ere						0238
Roles View as PDF	Completeness Check	Submit	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 Doc	ume	Co	llaborators	Submissions	Centre	History	
			Collaborators							
				Previous) Next	1 Navigate	2			
				View as PDF	Documents	Signatures	5			
				E Save	Share	Roles				
				Collaborators	Completeness Check	L Submit				

- 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.

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





Edit Permissions - Ms. Roxanne Noronha 🛛 🗙

✓ F	Read		
- \	Write		
⊽ ڊ ∎	Submit		
≤ ≤	Share		
(•	Create all sub forms		
F	Receive notifications	_	
		Save	Close

***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

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