QuickGuide: Creating a New Project

This QuickGuide outlines steps for creating a new project within SHORES.

<u>To create a New Project:</u>

<u>Getting Started</u>

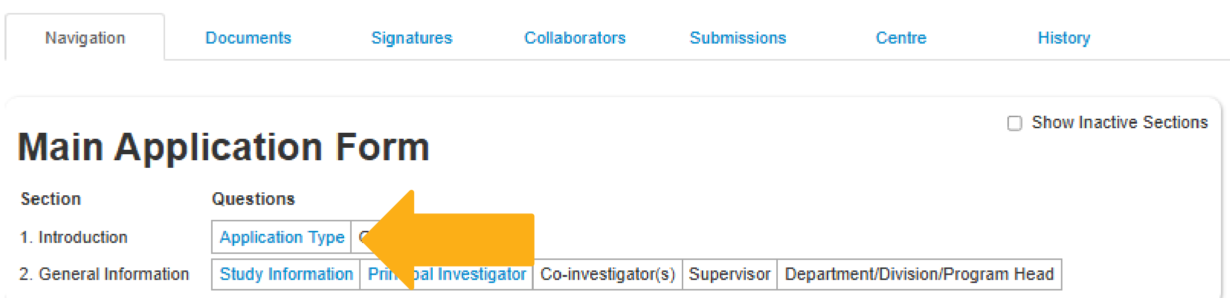
1. Log in to SHORES - https://apply.sinaihealthreb.ca

2. Click on '**Create Project**' from the **Actions Toolbar** and enter the following information:
   a.) Project Title.
   - Enter your short title (fewer than 200 characters).
     - This title will be used to access your file from the **Project Menu**.

   b.) Form
   - Select '**Main Application Form'**

3. Click '**Create**'

4. In the **Navigation** tab under **Section 1** begin by answering the first set of questions.

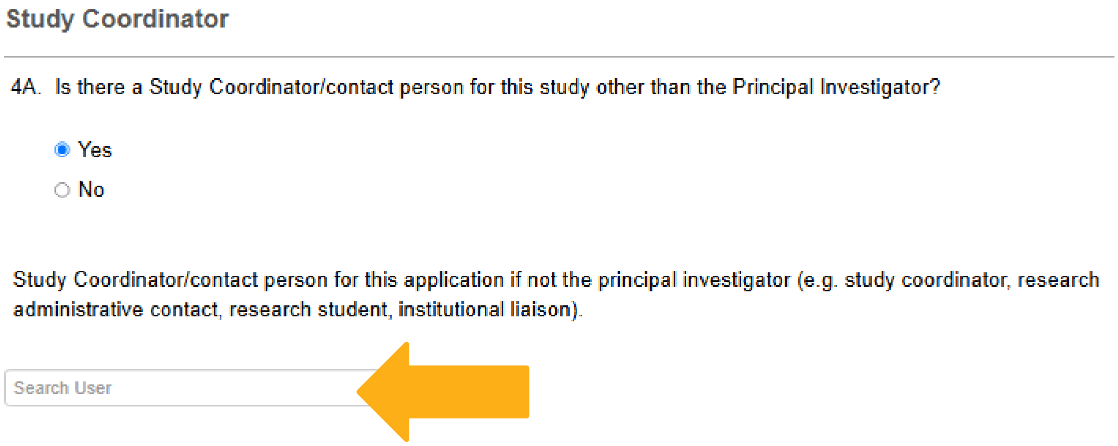


***NOTE:** For all submissions (except your Response to REB recommendations) choose '**Initial Submission**' in Question 1B.

<u>Adding the PI and Additional Study Personnel</u>

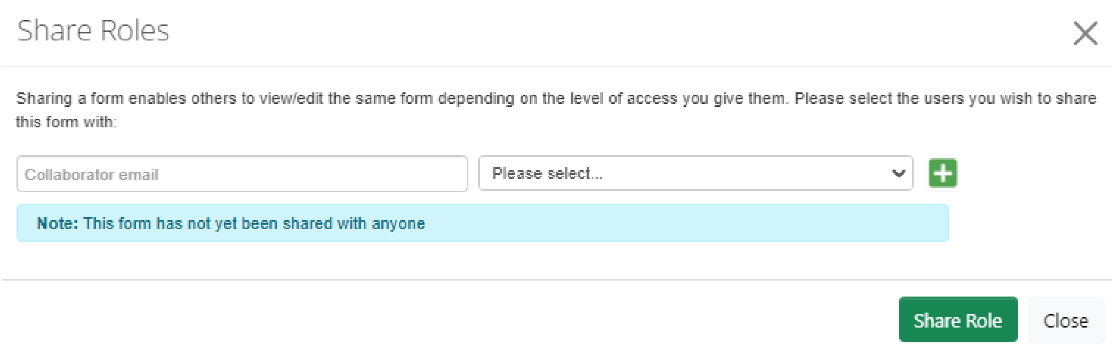
5. To add the PI or additional study team members in Sections 3 to 5 follow the **two-step** process below:

   1. Click on the box at the top of the section that says **Search User** and begin typing the name of the person that you wish to add. Once you find them, click on their name and they will be added into the form.

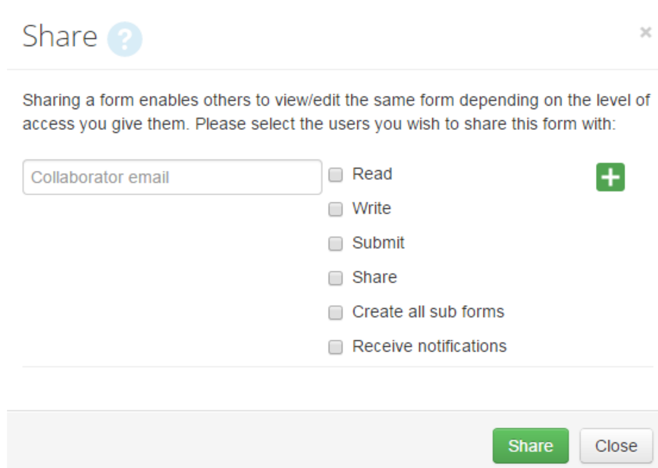


***NOTE:** To add another study team member of the same type, click '**Add Another**' and repeat the same steps.

2a. Click on the **Roles** tile in the **Actions Toolbar**. Enter the email address of the Principal Investigator. Choose the PI Role by clicking the dropdown menu beside their email address. Click **'Share Role'.**

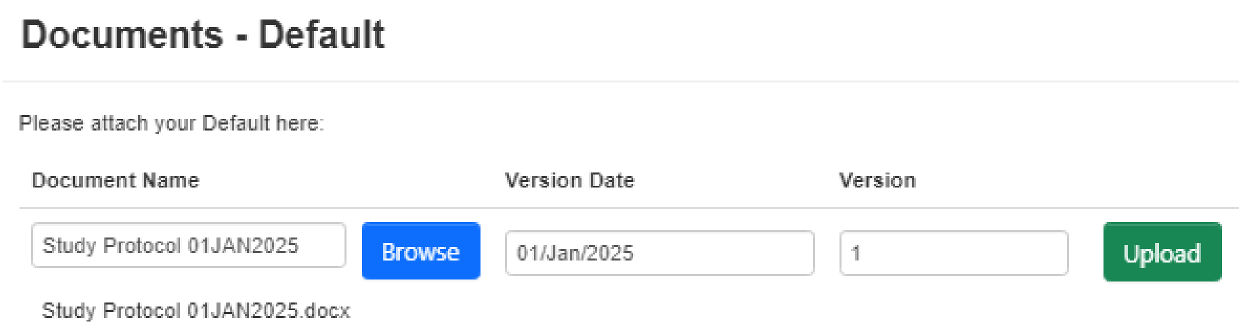


2b. Click on the **Share** tile in the **Actions Toolbar**. Enter the email address of the study personnel who need access to the form. Select the sharing options by clicking the checkboxes. Click **'Share'.**



Documents

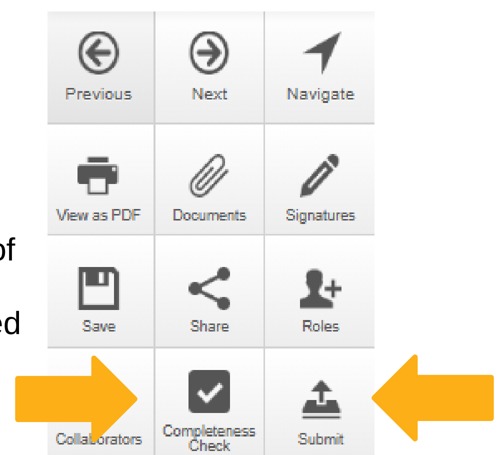
6. When you come to a question in the form which has a blue '**Upload Document**' button within the question, you can upload the document associated with that section.
    - Clicking on the **'Upload Document'** button will prompt you to upload your documents:
        i. Browse your computer for the document you wish to upload.
        ii. Provide a version date.
        iii. Provide a version number.
        iv. Click "**Upload**".



***NOTE:** In some questions this will not appear until you prompt it by answering the question. Please be sure to work through the form in sequential order to ensure that no questions are missed.

Submitting and Signing

7. If the application is complete you can then do one of the following:
    a. If you are the PI you can sign the application by clicking the blue **Sign** button on the last page of the application.
    b. If you are not the PI you can request the signature of the PI by clicking the **Request Signature** button on the last page of the application. You will be prompted to enter the PI's **Email Address** and click **Request**.



8. Once you have completed all of the required questions for your application you can check to ensure that your project is complete by clicking the **Completeness Check** tile. If there are any outstanding mandatory questions which have not been addressed, a dial box will open up indicating which questions still need to be addressed in the application.
   Once all mandatory questions are complete, including requesting signatures, click the **Submit** tile or in the **Actions Toolbar.**

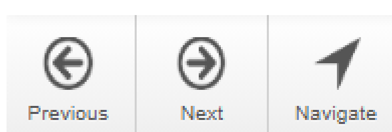
***NOTE**: Once all of the signatures have been signed, the project will be automatically submitted.

Additional Information

1. **Comments -** any user who has access to the application forms can add comments to other users. To add a comment, click on the comment bubble icon at the top right hand corner of each question. Comments are for study team use and are not visible to the REB.

2. **Help Text -** some questions within SHORES have associated help texts. To view the help text click on (i) icon in the top right hand corner of the question.

3. **Previous/Next/Navigate** – these three tiles on the left hand side in the **Actions Toolbar** will navigate you through the project and auto-save the form when pressed.



4. **Smart Form** - it is advised to work through the form in chronological order as it is a smart form and questions may appear or disappear depending on the answers you provide.

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