

# CREATING IACUC PROTOCOLS USING RIO

*A guide to fundamentals of creating online applications for submittal to the UCSF Institutional Animal Care and Use Committee*

Colors used in this guide:

help & navigation

portfolio

inside protocols

## PREREQUISITES

**Browser**

**PC**

Firefox 1.0+ or Internet Explorer 6.0 or higher

**Mac**

Firefox or Safari browser, version 1.0 or higher of either

## TO CREATE & EDIT PROTOCOLS:

Have UCSF **Principal Investigator status** or

See UCSF Contracts & Grants website for details on PI eligibility at UCSF (<http://www.research.ucsf.edu/cg/pistatus.htm>)

Have **Alternate Responsible Individual status on protocol**  
(as designated by your Principal Investigator)

Call Contracts and Grants at 476-2977, or Institutional Animal Care and Use Committee at 476-2197

## ALL USERS MUST:

Have a **ResearchOnline username and password**

RIO is a secure application; access is provided to those individuals listed on UCSF authorizations or protocols or who have taken online training through the Office of Research

To apply for a username and password see ResearchOnline (<https://www.researchonline.ucsf.edu/requestLogin.asp>)

## GETTING STARTED

**Login to RIO**

<https://www.researchapps.ucsf.edu/rio/>

**RIO home page**

**Alerts:** notification of a communication you have received from the IACUC or LARC eg. *application has been returned and changes are requested*

**Links:** to your portfolio and your authorization/protocol list

**Email alerts**

You will be notified via email: If pre-review or committee return your application for changes; final approval

**User options**

Update your profile (degree, title, address, email, etc.)  
Each person can edit **ONLY** their own profile

Change password

## GETTING HELP

### For assistance

**Technical help** (*connection & display problems, error messages*)  
RioTechHelp@ucsf.edu

**Filling out the online application**  
RioQuestions@ucsf.edu

### To schedule training

**Training coordinator**  
RioTrainer@ucsf.edu

### For questions regarding IACUC policies or procedures

**IACUC**  
415-476-2197

### For veterinary questions on writing your protocol

**On-call veterinarian**  
415-502-8687

### Frequently Asked Questions Online

**RIO Information Store** [http://www.research.ucsf.edu/\\_Rio/faq.asp](http://www.research.ucsf.edu/_Rio/faq.asp)

## PAGE LAYOUT

### Navigation

**Blue navigation** menu on page left (*closely follows the paper application form*)

**White text** on this menu takes you to specific application pages

**Navigation buttons** on top and bottom of each page

**USING THE BACK BUTTON ON YOUR BROWSER  
MAY CAUSE UNPREDICTABLE BEHAVIOR**  
- USE APPLICATION BUTTONS TO NAVIGATE

### Instructions

**Gray panel** at the top of each page  
*Red review/approval notes: indicate items required for submission*

**Help buttons** for data entry tips and one-time questions

**Active links** to guidelines, policies and external sites

### Section headers

**Dark blue panel** indicate subject  
(i.e., name of person/species being added and/or edited)

**Pale blue panel** indicates section topics, and table headers for matrix built as items are entered

### Entry tools

**Radio buttons** for yes/no questions

**Check boxes** for multiple response questions

**Pull-down menus** and **search lists**

**Text boxes**

## PORTFOLIO

**Portfolio owners**

Only UCSF Principal Investigators (PI) may be portfolio owners

**To view a protocol**

Select the appropriate PI name from the portfolio list

**Using the portfolio**

Create new applications

View current authorizations, personnel, use locations

## CREATING A NEW APPLICATION

**Select PORTFOLIO LIST from RIO home page**

Click on the appropriate PI name

**From within the AUTHORIZATIONS AND PROTOCOLS SECTION**

Select the **CREATE NEW APPLICATION** link at the bottom left

**Select INSTITUTIONAL ANIMAL CARE AND USE COMMITTEE (IACUC) APPLICATION**

Check the **CREATE APPLICATION(S)** button

You will see your new application number (in green)

Select the **RETURN TO YOUR PORTFOLIO** link (new application will be at top of your portfolio list)

## ACCESSING PROTOCOLS: PORTFOLIO vs. AUTH/PROTOCOL LIST

**If you select PI's PORTFOLIO**

You will see only the protocols for that particular PI

**If you select AUTH/PROTOCOL LIST**

You will see all of your protocol associations regardless of PI

## INPUT/EDIT YOUR NEW PROTOCOL

Go to portfolio list

Select PI portfolio

OR

Go to auth/protocol list

Select authorization/protocol

## SAVING & TIMING-OUT

Warning message: if input data not saved

Select **CANCEL** and save changes on page

Select **OK**, lose changes when leaving page

Automatic log out after 40 MINUTES

Save your work before you leave the computer

## ENTERING & VIEWING INFORMATION

Links

**ADD** - at bottom of section tables

**CLICK HERE** - under Details in section table headers

Search lists

Select or **SEARCH FOR** - located to the right of text boxes

Enter full or partial word

From table that appears:  
Click **SELECT** button or **NAME OF ITEM**

Entry tools

**Radio buttons** for yes/no questions

**Check boxes** for multiple response questions

**Text boxes** to type or paste in

Conditional items

Some entries depend on responses to previous questions

Example: If you answer 'yes' to the question about following the *Environmental Enrichment Guidelines*, the text box "If not, explain..." will become inactive as the question no longer applies. Answering 'no' leaves the text box active.

Attachment uploads

On the **DOCUMENTS PAGE - BROWSE & UPLOAD**

**BROWSE** your computer to locate file;  
**UPLOAD** diagrams, images, tables or articles

## ORDER OF ENTRY

*Entering animals into the protocol early will save you steps & time.*

Animals

Enter species

Enter administrative and functional roles

## LOCATION OF PAPER FORM ELEMENTS ONLINE

*For users who want to find the online equivalent parts of the paper applications, these 'what is where' guides to each online tool may help.*

Snapshot guides (PDF files)

Full form

[http://www.iacuc.ucsf.edu/howto/w2-fullapp02\\_callouts.pdf](http://www.iacuc.ucsf.edu/howto/w2-fullapp02_callouts.pdf)

Annual review

[http://www.iacuc.ucsf.edu/howto/w2-renappl02\\_callouts-nochanges.pdf](http://www.iacuc.ucsf.edu/howto/w2-renappl02_callouts-nochanges.pdf)

Modification and annual review

[http://www.iacuc.ucsf.edu/howto/w2-renappl02\\_callouts-changes.pdf](http://www.iacuc.ucsf.edu/howto/w2-renappl02_callouts-changes.pdf)

Modification only - to be added

## SUBMIT OR CANCEL APPLICATION

Return to the application Main Page  
to **SUBMIT** or **CANCEL**

New applications, annual reviews,  
and modifications

Select **SUBMIT APPLICATION (TYPE)** button

Select **CANCEL APPLICATION (TYPE)** button  
(You will get a message requiring your confirmation  
that you really want to cancel your application)