PARTNERS™
HUMAN RESEARCH COMMITTEE

PHRC Member Insight Instructions

**Logging Into The Insight Research Portal**

You may access the Insight Research Portal from any computer that is connected to the Internet. The Meeting Detail page will be updated with meeting specific documents one week before the scheduled IRB meeting. Members will receive an email notification when the meeting specific documents have been posted. A link to the meeting page will included in the email sent.

To login using the link in the email:
1. Click on the link in the email

2. Enter your Partners user name and Password. Note: If you have forgotten your password or it has expired go to https://myprofile.partners.org to create a new one.

To login without the link in the email:
1. Go to https://insight.partners.org

2. Enter your Partners user name and Password. Note: If you have forgotten your password or it has expired go to https://myprofile.partners.org to create a new one.

3. Click on the Meeting Management tab or click the [go to Meeting Management] button.
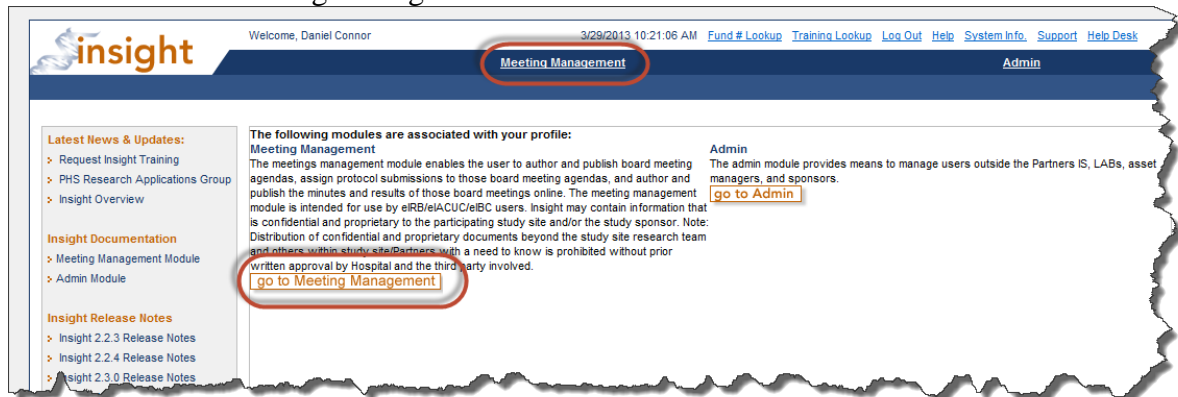
4. Click on the Meeting Date –to find a Meeting Date not displayed on the screen, enter the date range that includes the meeting and click the search button.

ACCESSING MEETING INFORMATION
Once you are in the Meeting

DOWLOAD MEETING MATERIALS

Starting from the Meeting Details page

1. Click the `download meeting materials` button to download a zip file with all meeting materials.

REVIEWING SUBMISSION DOCUMENTS INDIVIDUALLY

Starting from the Meeting Details page

1. Click on the Protocol number of the submission you would like to review

2. Under the 'Submission Documents to be Reviewed' grid, click on the pdf or Word file icon to open the document.

REVIEWING OPTIONS

The majority of documents for a submission should be in single pdf. This pdf will include the application, detailed protocol, protocol summary and consent form (if applicable), as well as other study related documents. There will be times when some of these documents may be separate from the full application but all should be included in the submission record unless otherwise noted by the Administrative Chair. Below are directions to help you review the submission documents online.

REVIEWING THE 'FULL APPLICATION' ONLINE

Copying Text from a PDF

Copy text and paste into the Reviewer Worksheet or other document to which you can add your comments/changes/questions in preparation for the IRB meeting. The Review Worksheet is located in the SharePoint Meeting Panel home page under the 'Review Documents' section.
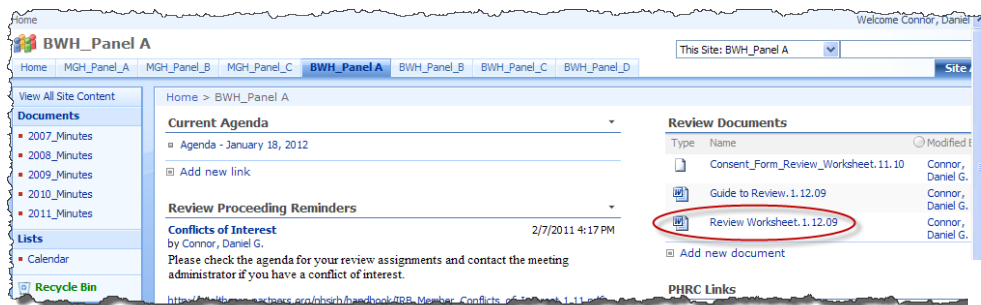
Download Review Worksheet
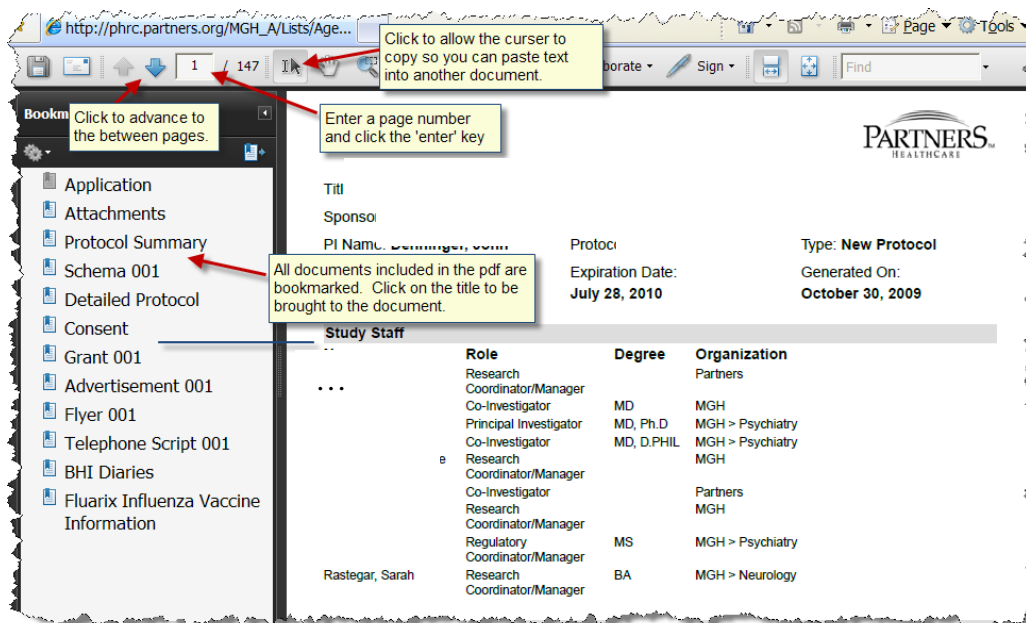
Copy text from pdf

Copying Text from a WORD Document
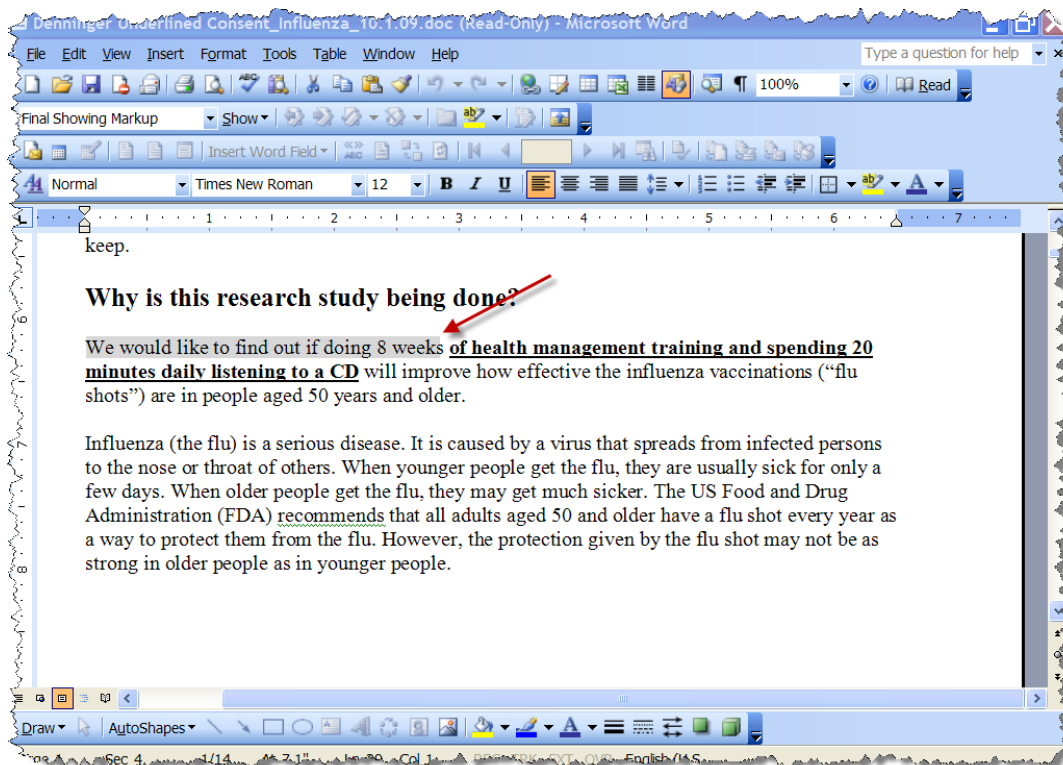
Click and drag to highlight text that you want to copy. Once highlighted, click the [image] button to copy the text and click the [image] button to paste the text into the Reviewer Worksheet or other document to which you can add your comments/changes/questions in preparation for the IRB meeting. The Reviewer Worksheet is located in the SharePoint Meeting Panel home page under the 'Reviewer Documents' section.

REVIEWING TWO DOCUMENTS AT THE SAME TIME

At times it might be helpful to have more than one documents open at a time to refer between the two. To do this:

1. Make sure the two documents are open
2. Click and hold the Windows ⊞ key (the key between the Ctrl and Alt keys on the left hand side of the keyboard).
3. Push the Left arrow key on your keyboard to move the window to the left.
4. Click on the second window.
5. Click and hold the Windows ⊞ key.
6. Push the Right arrow key on your keyboard to move the window to the right.
7. If needed, make the document text smaller or larger by using the plus/minus sign or % pull down menu.
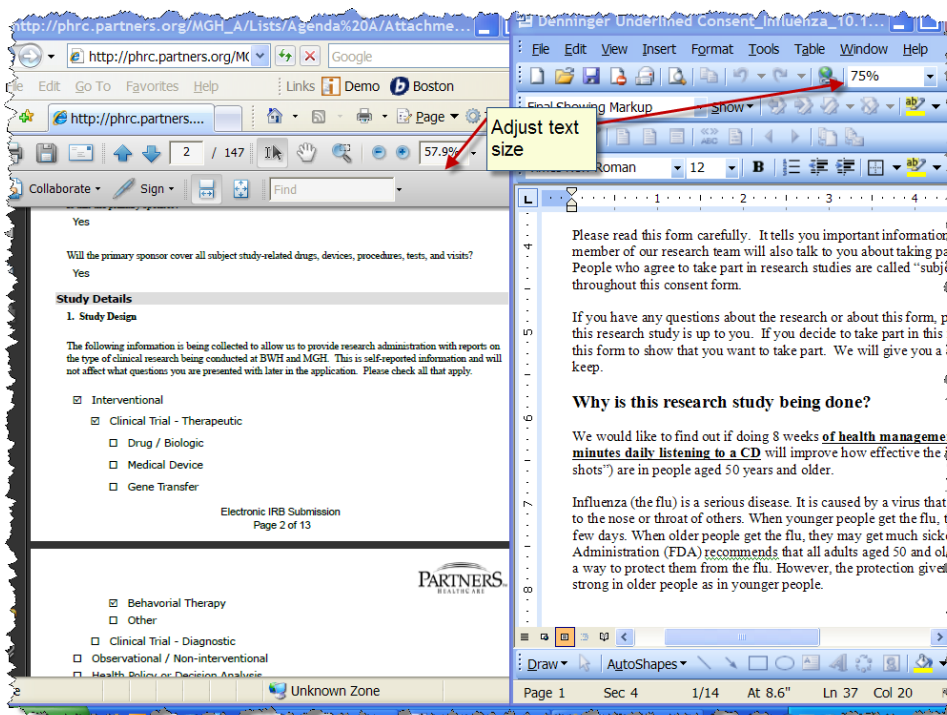
Printing Documents

You can print an entire document or just certain pages.

To print an entire document, click [printer icon] icon to send the document to your printer.

To print certain pages, find the page numbers of the document you want to print.
1. Click the File menu and Print.
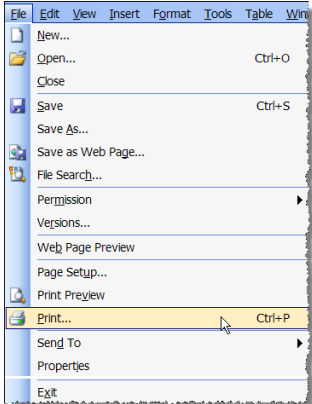
2. Under 'Print Range' in the printer dialog box, select the 'Pages from and to'. Enter the appropriate page numbers and click the [OK] button.

Saving Documents

You may save some or all of the submission documents in preparation for a meeting. To save a document, click the File menu and Save As…
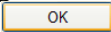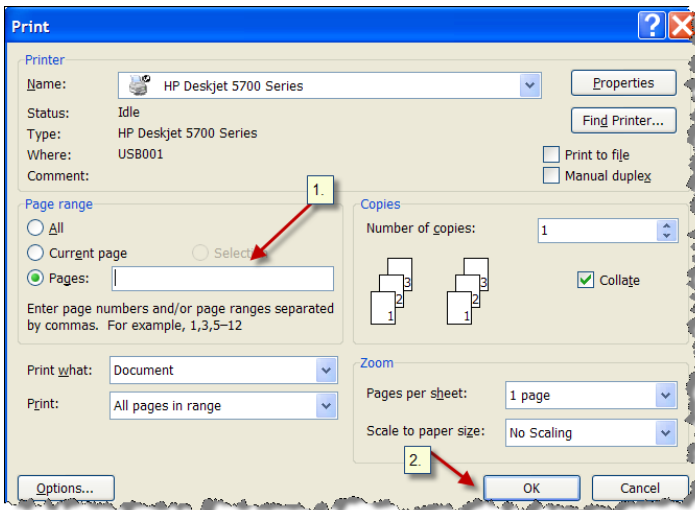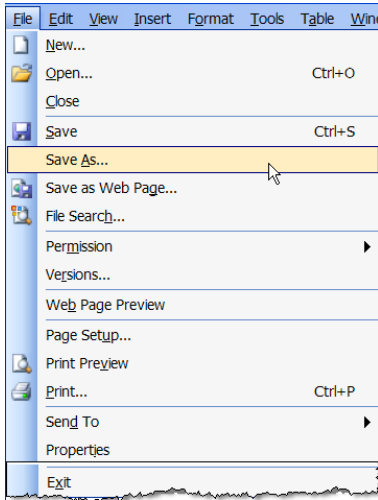

Members should only save investigator submission documents on a secure password protected computer. All laptops/netbook/tablet computers, external hard drive, flash/USB drives or other mobile devices must also be full disk encrypted.

All investigator submission documents must be **permanently deleted** (empty computer trash/recycle bin) after every IRB meeting. Contact your panel Chairperson if you think someone has gained access to any investigator submission documents that you have saved for your meeting preparation.

As a reminder, distribution of confidential and proprietary documents is prohibited without prior written approval of the Chairperson of Partners Human Research Committee.

Using Comment & Mark up Tools in Adobe for PDFs

The Adobe Reader and Adobe Acrobat both allow users to mark up pdfs. Reader allows users to just highlight text and add sticky notes. Acrobat allow users to add sticky notes/comments, highlight, cross out text, and add arrows and shapes to pdf documents.

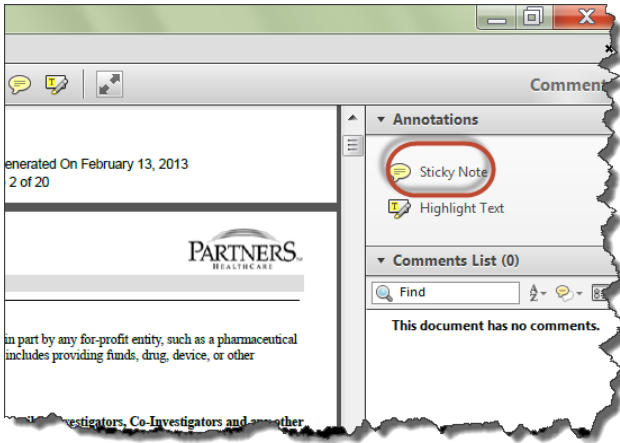## In Reader

To begin:

1. Save the protocol submission document pdf to your computer
2. Open the pdf you want to mark up in Adobe Reader
3. Click the word 'Comment' towards the top of the screen to open the Annotation toolbar
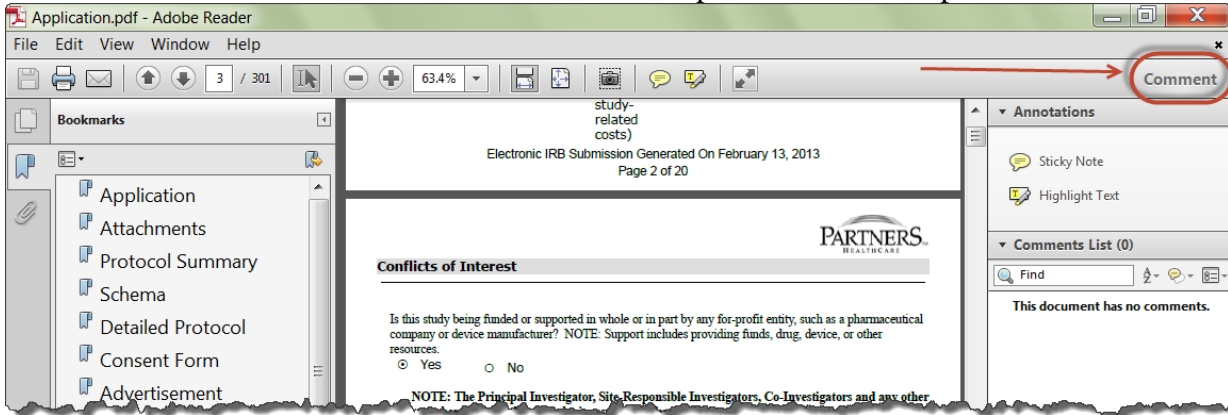
4. To add a Sticky Note click the word 'sticky note' and click where on the document you would like to add it.

5. Enter your comments in the sticky notes text box.

6. When done, click the minimize icon to hide the note.

To Highlight Text
1. Click the words highlight text in the Annotations toolbar
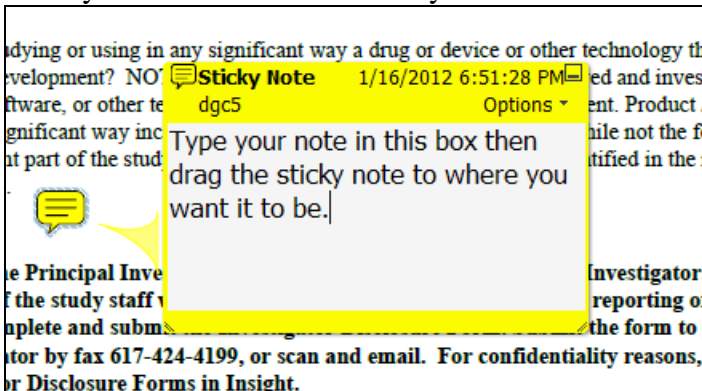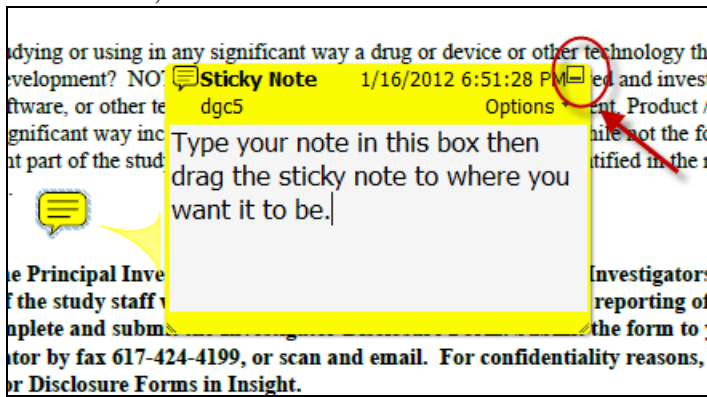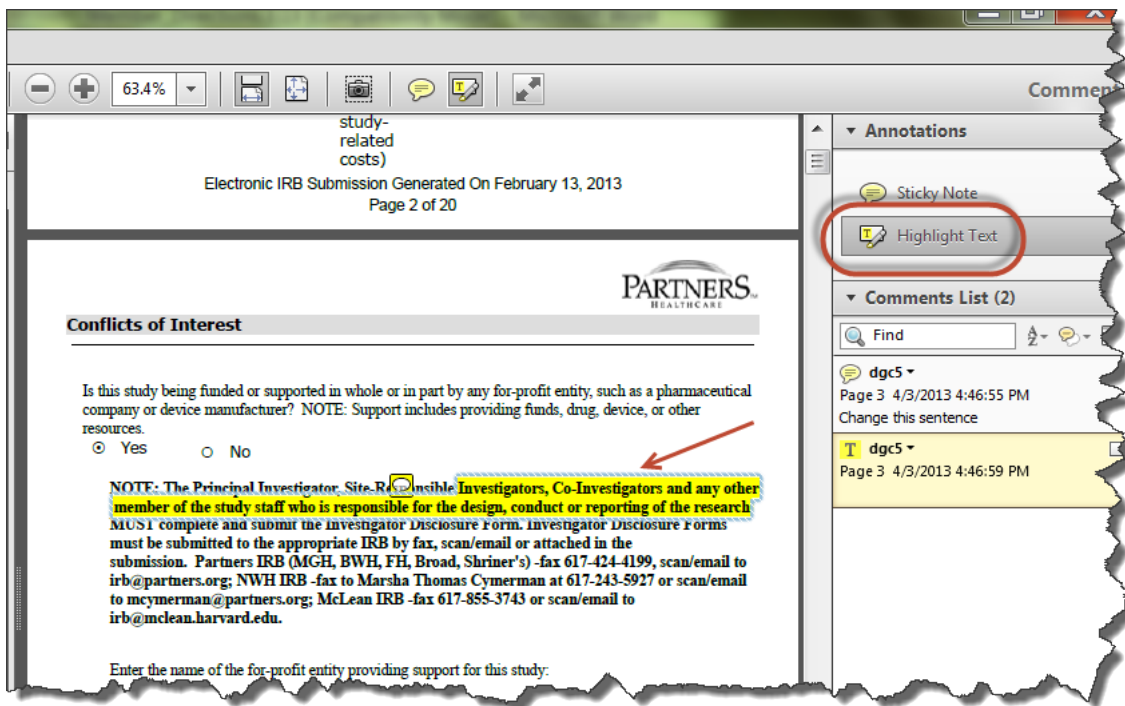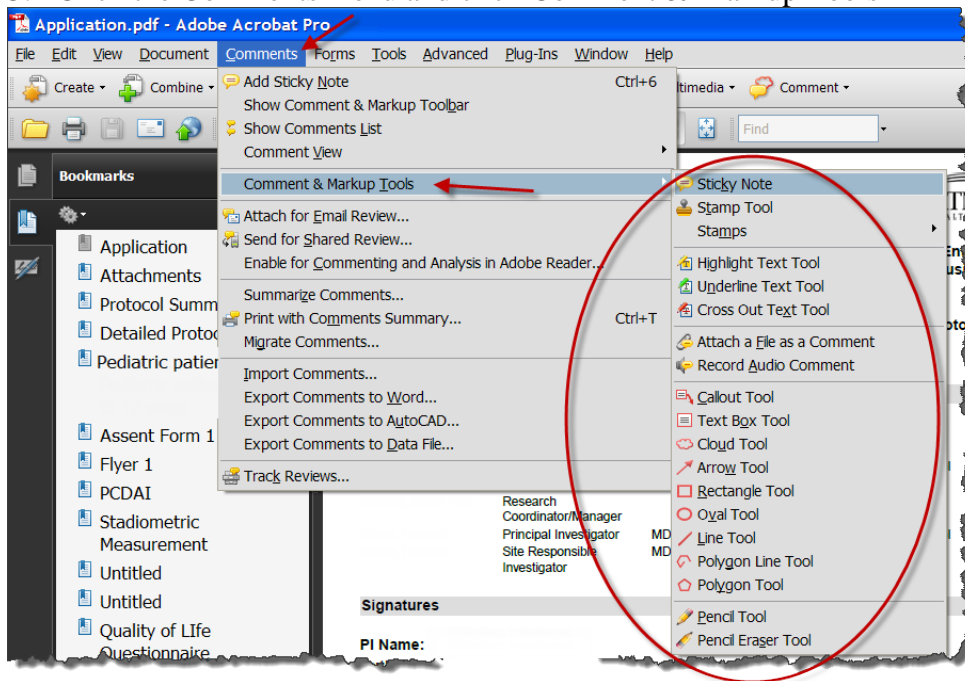2. With the curser click and hold while highlighting the appropriate text

In Acrobat

To begin:

1. Save the protocol submission documents to your computer
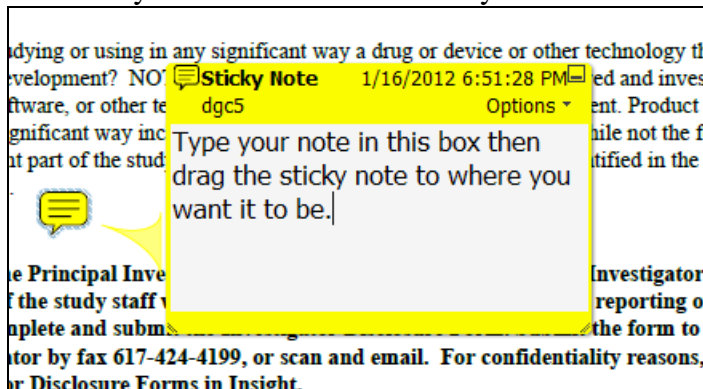2. Open the PDF you want to mark up in Adobe Acrobat.
3. Click the Comments menu and click Comment & Markup Tools

4. To add a sticky note, click the 'Comments' menu and select 'Add Sticky Note'
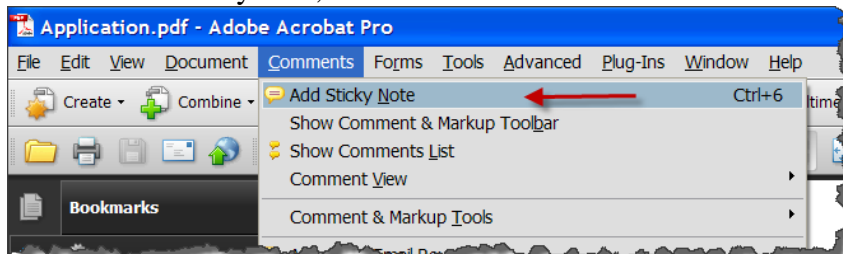
5. Enter your comments in the sticky notes text box.

6. When done, drag the sticky note to where you want it in the document and click the minimize icon to hide the note.
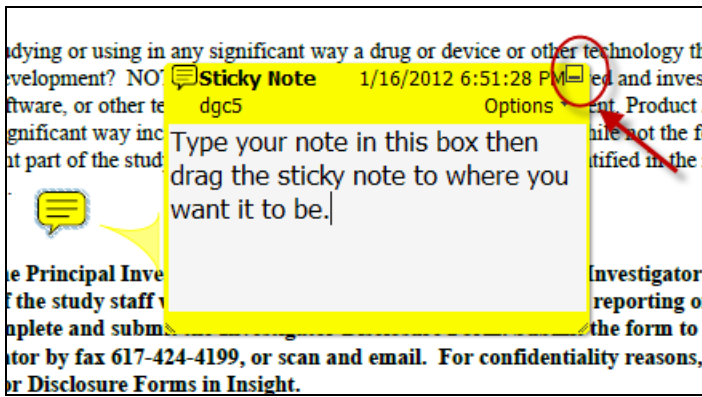
Compiling Comments to Print or export

7. Click Comments menu and select 'Show Comments List.' This will compile your comments in a list that you can print or export to Word.

8. To print your comments, click the 'Print Comments' icon and select 'Print Comments Summary.'

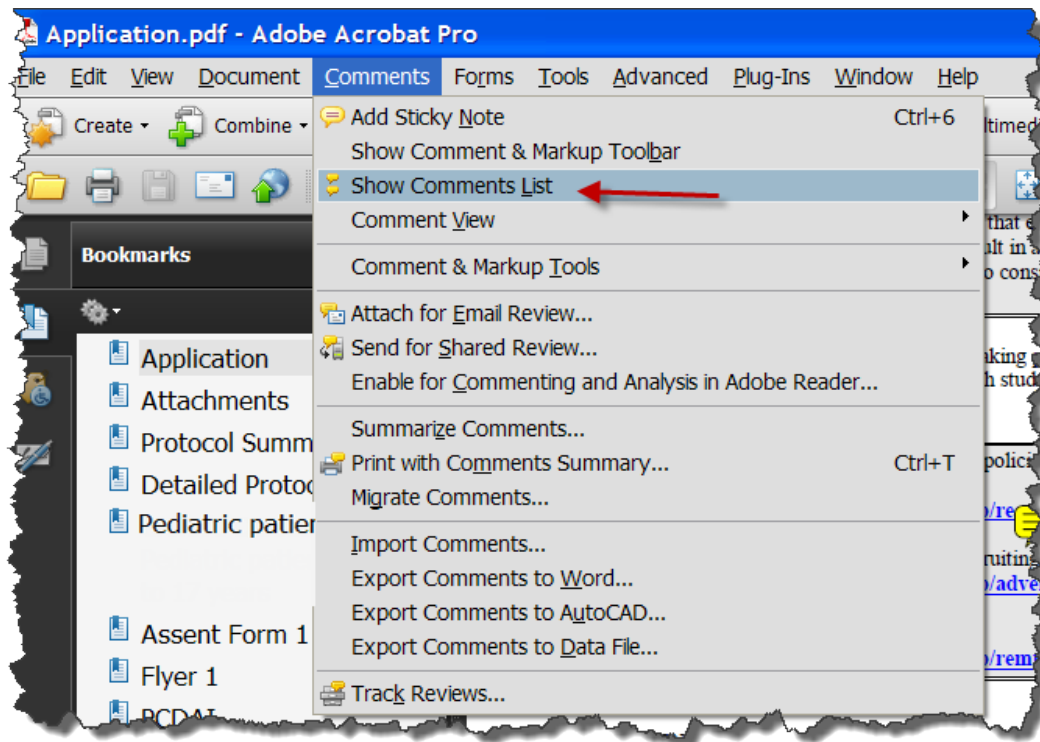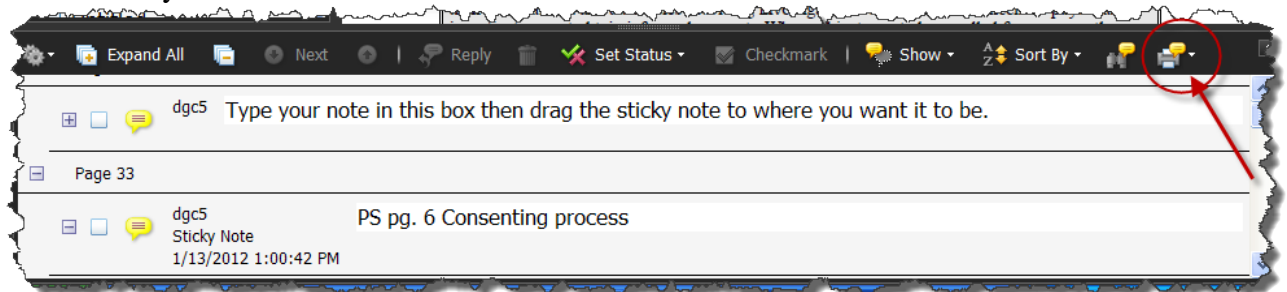9. To export your comments to Word, click the 'Options' icon and select 'Export your Comments to Word.' Note: You may need to add tags to the document first. To do this click the 'Advanced' menu and select 'Accessibility' then 'Add Tags to Document' menus.
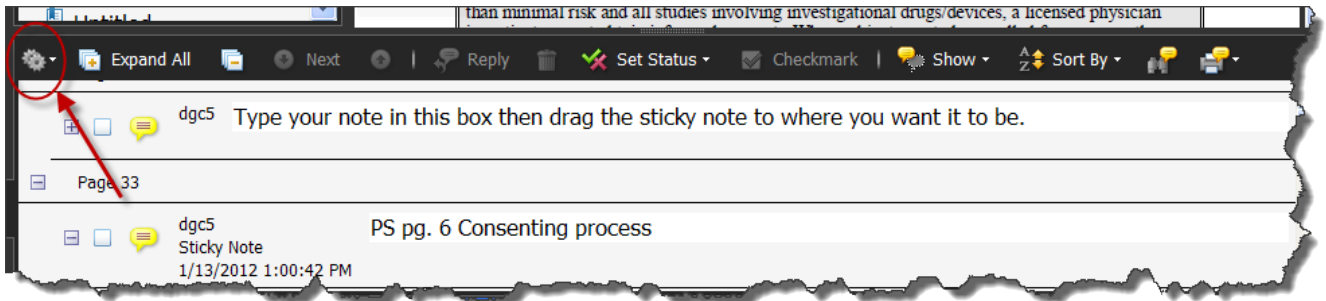
10. To create a pdf that lists all of your comments, click the 'Print Comments' icon and select 'Create PDF of Comments Summary.'
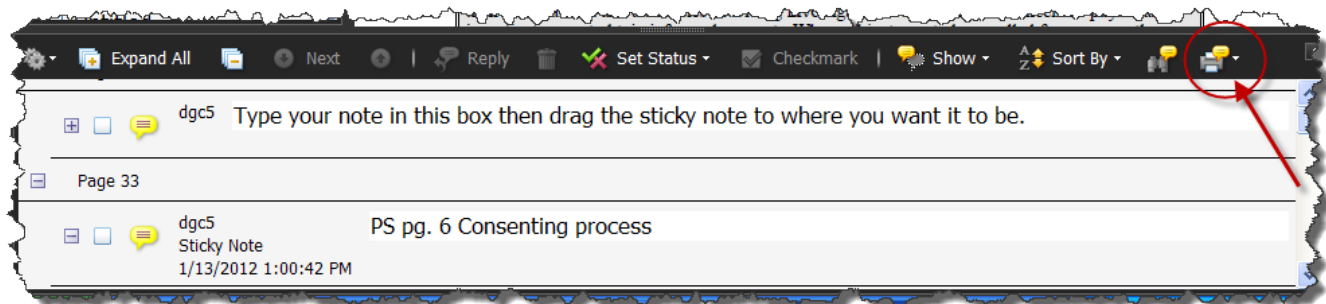
Moving Documents to an iPad Tablet Computer
1. Save the protocol submission documents to your computer
2. **Open iTunes** and connect your iPad to your computer.
3. **Click on iPad or iPad 2** in the left navigation bar. Then click on the Apps tab (it's the third option).
4. **Scroll past Sync Apps** to File Sharing.
5. **Select the app** that can transfer documents between your iPad and your computer. In this case, we chose GoodReader.
6. **At the bottom right of the screen click Add**. Browse your file library to select the document you would like to synchronize.
7. **Click Sync.**
8. **Disconnect your iPad**, and open GoodReader.
9. **In GoodReader**, s**elect the document** you just synced to review and markup.