

# Preparing the Protocol for the Committee

## Quick Reference Guide – Weill Research Gateway

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This document is intended for: **EHS Regulatory Coordinators**

### Trigger for preparing a protocol

Once the protocol has completely gone through the route, you will receive both an email and Action Item in WRG which states: 'REGULATORY COORDINATOR ACTION REQUIRED...'

### Open the Action Item and assign reviewers

- Click the link contained in the **Action Item**.
- Click the **Assign to Self** button at the top of the screen.
- Currently there are no reviewers added. Click the **Add** link next to Reviews.
- Click the **Method** dropdown and make an appropriate selection.
  - Select **Member Review** if you want to send this to a selection of overall committee members to review in advance of the monthly meeting.
- Click the **Board** dropdown and select the board which corresponds to the protocol.
- Click the **Add** button.
- On the next popup window, click the **Review Category** dropdown and make the appropriate selection.
- Ensure **Agenda** remains switched to **No** for the initial Member Review.
- Leave **Agenda Date** blank for now. You'll select this later.
- **Review/Meeting Date** should also be left blank.
- Click the orange **Add/Change** button to add reviewers.
- **Highlight the names** of the Board Members and Associated Personnel who will be doing the initial review and click **Select** to add them.
  - Note you can hold down the Control (PC) or Command (Mac) key to highlight multiple selections.
- Click **Save** and then **Close**.
  - You'll see the Reviewers added to the protocol.
- Click the orange **Send All Action Items** button.
  - Optionally, you can send to individual reviewers by clicking the orange Send link next to their name.
  - This will result in the reviewers receiving both an email as well as a WRG Action Item to begin their pre-review of the protocol in advance of the monthly meeting.
- Click **Save** at the top of the screen and then click **Close**.
- You'll see the Member Review added to your Action Item.
- Note that you'll want to keep this Action Item open during the Member Review process. Do not click I am done.
- Once all members have completed their initial reviews, you'll receive an email with the subject: "All reviews have been completed..."

## Add protocol to Committee Meeting agenda

- Open the **Action Item**.
  - Note that you had this Action Item essentially on hold. You can reference the protocol number in the “All reviews have been completed” email if you’re not sure of the Action Item.
- Now that the Member Review has been completed, you need to add a Full Committee review. Click the blue **Add** link next to Review to add a Full Committee review.
- Click the **Method dropdown** and select **Full Committee Review**.
- Click the **Board dropdown** and make the appropriate selection corresponding to the type of protocol.
- Click the **Add** button.
- Click the **Review Category dropdown** and make the appropriate selection.
- For the **Agenda** section, ensure the **Yes** radio button is selected.
- Click the **Agenda Date** dropdown and select the committee meeting date you’d like to add this protocol to.
- Next to **Review/Meeting Date**, enter today’s date.
- For Reviewers, you can leave this section blank. The system will automatically add the appropriate committee members.
- Click the **Save** button, followed by the **Close** button.
- Under Finalize Task/Assignment, click the **Next Step/Decision dropdown** and select **Committee Review**.

## What happens next?

At this point the protocol will be added to the agenda for the Full Committee review during monthly meetings.