**GETTING STARTED**

- Log into IDEATE ([https://ideate.cuny.edu/home/](https://ideate.cuny.edu/home/)) using your CUNY Portal log-in credentials (Note: this is **not** the same as your GC email/library account or CUNY First). **Please use Firefox as your browser when using IDEATE and make sure you are working from a desktop or laptop computer. Use of other browsers (e.g. Chrome, Internet Explorer, Safari) and mobile devices (e.g. iPads) can lead to system errors and information loss that can seriously delay the application process.**

- If you’ve forgotten your CUNY Portal password, you can re-set it here: [https://cunyportal.cuny.edu/epr/authenticate/portal_login.jsp](https://cunyportal.cuny.edu/epr/authenticate/portal_login.jsp)

- **The first time you log in to IDEATE, please check to make sure your user profile information is accurate.** You can view your user profile by going to the “Manage” link on the top of the page and clicking on “My User Profile.” Please ensure that all information (Name, CUNY email address, Department (i.e. campus), University Status, etc.) in your profile is accurate. If any of this information is incorrect, contact hrpp@cuny.edu and they will update your profile. Note that neither the researcher nor GC HRPP staff can make changes to the IDEATE user profile.

- To create a new application, click on “Create New” from the menu and select “IRB Application”.

- To start a Continuing Review or Amendment, click on the protocol number of the project, then click on the “Lifecycle Event Manager” tab in the LiveList. In the Actions drop-down box, please choose “Create Amendment” or “Create Continuing Review,” then click on the “Go” button to the right of the Actions field.

**Special Instructions for Student Submissions**

- Student applications will be processed by the HRPP office at the faculty advisor's primary/home campus. If your advisor’s primary campus is not the Graduate Center and you need help with your application, please contact the HRPP coordinator at your advisor’s home campus. You can find the contact list for CUNY coordinators here: [http://cuny.edu/research/compliance/human-subjects-research-1/HRPP-Coordinators.html](http://cuny.edu/research/compliance/human-subjects-research-1/HRPP-Coordinators.html)

- To add your faculty advisor to the application, enter your name as the PI under the Summary tab. Under PI Relation to CUNY, select Student. Next, go to the Current Research Personnel tab. Your name will appear as the PI if you’ve entered it under the Summary tab. However, you will still need to add your advisor. Follow the prompts for adding personnel on this same tab. Check to make sure that next to your advisor’s name it says Faculty Advisor in the “Role” column and that under the “Access” column you see an X. When you add your advisor to the Current Research Personnel tab, their name will automatically appear in the “Identify faculty advisor/program director” field on the Summary tab. Note that you must answer “Yes” under the CC and Access fields for your faculty advisor.

- When contacting the GC HRPP team, please be sure to include the full name of your faculty advisor in all correspondence.

**TROUBLESHOOTING**

**Submission**

**Issue:** I am ready to submit my application, but I don’t see a submit tab.

**Recommendation:** First, please make sure that you are accessing the protocol from the To Do List, rather than the Live List. Once you have confirmed that you have accessed the protocol from the To Do List, please check to see if your advisor and all other personnel have accepted the invitation to join the protocol by viewing the Current Research Personnel tab. Please note that all members of protocol personnel, including faculty advisors, who are engaged in research should be listed on the Current Research Personnel tab. Only personnel serving on the protocol in a purely administrative capacity, such as those involved in grant administration or analysis of de-identified data, may be listed in the Other Personnel tab. If you see the word “Pending” next to someone’s name, it means that they have not yet confirmed their participation. Please reach out to them and ask them to log in to IDEATE and click on the invitation to join the protocol from the To Do List on the left of the screen.

**Issue:** My advisor (or other personnel member) cannot find the invitation to join the project in their To Do List. Can I send it again?
Recommendation: When you add someone to the Personnel tab, they will automatically receive an invitation to join your protocol. If that person cannot find the invitation on their To Do List, there is no need to (and no way to) send it again. Please provide your advisor or other personnel member with the protocol number and request that they scroll carefully through their To Do List. Note that the most recent notifications will appear at the bottom of the list. Depending on how many protocols are in that person’s list, they may not see yours at first glance.

Issue: I am trying to submit my protocol, but I’m receiving a message saying the application is incomplete.

Recommendation: You are required to complete all text fields and upload all required documents before you will be able to submit. Return to the tabs marked with red asterisks to identify which fields are incomplete.

Issue: I think I submitted my protocol, but I’m not sure if it went through.

Recommendation: Please check to see if the protocol is still on your To Do List. If it is, it means that it was not successfully submitted. Please try again to submit.

Personnel

Issue: I am trying to add someone to the Personnel tab, but their name is not coming up in the system.

Recommendation: Please note that only CUNY-affiliated researchers with CUNY Portal accounts can access IDEATE and be added to a protocol. If the person you would like to add does not have a CUNY Portal account but their name does not show up when you search, ask them to log in to IDEATE at http://ideate.cuny.edu/home. Once they log in for the first time using their Portal user ID and password, their name will be added to the system and you will be able to add them to the protocol.

Research Sites

Issue: I am affiliated with the Graduate Center, but my research will take place off campus. What should I put here? Should I add the name of the city or country where the research will take place?

Recommendation: If you are a Graduate Center student or faculty member, you should add the Graduate Center here. To determine whether other institutions are also engaged in the research, please consult the OHRP Engagement Memo http://www.hhs.gov/ohrp/policy/engage08.html[hhs.gov]. Specifically, please see section III, “Interpretation of Engagement of Institutions in Human Subjects Research.” There is no need to add “New York, NY” or the name of any other city or country where you will be doing the research. Note that the actual research location (e.g. Cobble Hills Cinema, Brooklyn, New York) must be listed in the Procedures and Risks tab for each corresponding research procedure.

Issue: I have determined that another institution is engaged with the research, but the name of that institution does not come up when I search for it. How can I add that site?

Recommendation: Email hrpp@cuny.edu to have the institution added to the system.

Funding Sources

Issue: I am trying to add a Funding Source, but the name of the source does not come up when I search for it. How can I add a funding source?

Recommendation: Email hrpp@cuny.edu to request that the funding source be added to the system.

Attachments

Issue: I am trying to add an attachment, but it’s not working.

Recommendation: Please make sure that the document you are trying to attach is in Word or PDF format. If there are any symbols in the document name (e.g. &, -, #, @, +, etc.), please rename the document and try uploading it again.
Other issues

Issue: I am trying to type information into the application, but it’s not saving.

Recommendation: Please make sure you are using Firefox as your browser, working from a computer (rather than a mobile device) and that you are accessing the project from your To Do List to the left of the screen. If you access the project from your LiveList, anything you type into the text fields will not save.

Issue: I am not receiving auto-generated emails from IDEATE.

Recommendation: Please log into IDEATE, click on Manage in the menu located at the top of the page, select My User Profile, then Contact Info, and review the email address that is specified in the Email Addresses field. Note that only CUNY email addresses are supported. If an incorrect email address is listed, please email hrpp@cuny.edu to request that the email address be revised.

More Help

If you need additional information regarding how to submit in IDEATE please refer to the help documents link: http://cuny.edu/research/compliance/human-subjects-research-1/hrpp-policies-procedures/how-to-use-ideate.html

Use the username: CUNY_Ideate_rollout and the password: musicbzyr123q7 to log in. Please note that these documents are proprietary and that the log-in information should not be shared.

Still have questions?

Write us at gc-irb@gc.cuny.edu or gc-irb2@gc.cuny.edu, or call 212-817-7527 or 212-817-7531. Please include your IDEATE protocol number in all correspondence. If you are a student, please also include the full name of your faculty advisor in your initial message to us.