CUNY HRPP Procedures: How to Use Ideate

Creating an Amendment

An Amendment may be created for an **Active** protocol only.

**To Create an Amendment:**

1. Open a protocol.
2. Navigate to the Lifecycle Event Manager > Main tab.
3. In the Actions field, click on **Create Amendment**.
4. Click the **Go** button to the right of the Actions field.

**Result:** The Amendment application form will be available for the user to complete.
Amendment Summary Tab
Each amendment application form begins with an area to summarize the proposed change(s) to the research protocol.

The remaining tabs represent the protocol record. All proposed changes to the protocol should be made within this protocol record. Any changes that are made are collected via the appropriate tab and then summarized for all users in the “Summary of Changes” section on the Amendment Summary Tab.

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Amendment Summary Tab

Will participants already enrolled be informed of the change?  
- Yes  
- No

Will participants who have completed the study be informed of the change?  
- Yes  
- No

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Summary of Changes:

No Changes
Attachments

There are several actions that may be taken through the Amendment for attachments to the research protocol.

Deactivating an Existing Attachment
When a document will no longer be used, the attachment may be identified as such by clicking the “Deactivate” link. Once an attachment it deactivated, it may only be used again by adding the document as a “New Document” within another Amendment.

Replacing an Existing Attachment
When a new version of an existing document is to be submitted for review, click on “Replace” under the “Actions” column. **NOTE:** Upload the **CLEAN** version of the document here.

Once the replacement has been uploaded, a “Marked Up” version of the document is required to be uploaded within the “Marked Up Version” column to submit the Amendment.

Adding a New Attachment
When a new document is to be added to an Amendment, click on “Add New Document” within the New Documents section, provided the required information and upload the new document.