Create and Submit an Amendment

WORK INSTRUCTIONS:

1. Log into the Click Portal and click on the **Agreements** tab in the top navigation bar.

2. Find the protocol in the **Approved** state that you would like to submit an amendment for.

    - Principal Investigators (or a PI Proxy, if identified) can click on the **Active** tab to find the agreements that are in the **Approved** state and can click on the name of the agreement to begin their submission.

3. From the Agreements Workspace, select the **Create Amendment** button.

4. Enter the updated information on the SmartForm pages.

    - *Note that an approved protocol can have only one outstanding amendment or continuing review open at a time.*

5. Prior to submission to the Agreements Manager, all required fields will need to be completed.

    - Click the **Hide/Show Errors** link in the navigation bar to display any unanswered questions throughout the SmartForm at the bottom of the page.

        - Use the **Jump To:** link to navigate directly to SmartForm pages that are missing information.

    - Submissions with any incomplete information will be redirected to the study team for updates.

6. When all of the required fields have been completed, click **Exit** in the navigation bar or the **Finish** button on the last SmartForm page to be redirected to the Agreements Workspace.

7. The agreement will transition from the **Active** state to an amendment in the **Pre-Submission** state.

8. Click the **Submit** activity. This activity will remind the PI of their responsibilities and the system will check the submission for any missing fields. Click the **OK** button to submit the amendment.

9. If the submission is successful, the page will refresh and the agreement will transition from the **Pre-Submission** state, and then to the **In Review** state.