University at Buffalo
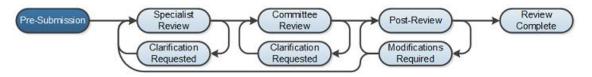*The State University of New York*

Create and Submit a Follow-On Submission

WORK INSTRUCTIONS:

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

2. Find the protocol in the **Approved** state that you would like to submit a continuing review for.

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

   - Principal Investigators can also navigate directly to the protocol by clicking on the link provided in the **Continuing Review Reminder** email notification that are sent to the Principal Investigator 90, 60, 30, and 15 days prior to the protocol's expiration date.

3. From the protocol Workspace, select the **Create Continuing Review** button.

4. Click the **Continue** button.

5. Enter the required information on the first page of the SmartForm, and then click to complete any additional SmartForm pages.

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

6. Prior to submission to the Safety Specialist, 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 protocol team for updates.

7. 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 protocol Workspace.

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. Place a checkmark next to the agreement statement and then click the **OK** button to submit the protocol.

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