University at Buffalo
The State University of New York

Create and Submit a Safety Protocol

WORK INSTRUCTIONS:

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

2. Under **My Current Actions**, select the **Create Safety Submission** button to create a new Safety protocol.

3. Enter the required information on the first page of the SmartForms, ***Basic Information***.
   - *Required information fields are marks with an asterisks (*)*

4. Select the appropriate safety review:
   - Biosafety
   - Stem Cell Research Oversight
   - Chemical Safety
   - Radiation Safety

   The SmartForms will branch to include additional SmartForms that are related to your selection.

5. Click the **Continue** button at either the top or bottom-right of the form.

6. **Navigate** through all of the SmartForms and complete all of the required fields
   - *Click the Help icon ( ) for more information about a question or field*

7. Click the **Hide/Show Errors** link in the navigation bar at the top or bottom of the SmartForm page to display any unanswered questions
   - *Use the **Jump To:** link to navigate directly to SmartForm pages that are missing information*
   - *Protocols with any incomplete information will be redirected to the protocol team for updates*

8. When all of the required fields have been completed, click the **Finish** button in the footer of the last SmartForm page to be redirected to the protocol Workspace.

Your protocol has not yet been submitted for review.

9. Assign any additional staff to the Safety protocol, as necessary:

    - **Assign PI Proxy** – assigns a user that will have the ability to act on behalf of the PI within the Safety module. This individual will have the same access to the protocol as the PI, and will receive the same system-generated email notifications. The PI Proxy must be selected from the individuals that were added to the protocol team.

    - **Assign Primary Contact** – assigns a user that will receive the same system-generated email notifications as the PI. The primary contact will not have the same access to the protocol as the PI.

    - **Manage Guest List** – manages individuals on the Guest List; guests can read the protocol and any follow-on submissions, but cannot edit them. They will also not receive the same system-generated emails that a PI does.

10. Click the **Submit** activity located under **My Current Actions** on the left side of the protocol Workspace. Read the statement, and then click the check box to agree with the statement. Click **OK** to submit the protocol for review.

    - The system will check the protocol to ensure that all required questions have been answered on the SmartForms. If any items have been missed, you will be prompted to answer them.

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