

Project Review - Generate and Send Letter

- Prepare the Letter:

1. Select the “Prepare Letter” activity
2. Select the appropriate letter template from the dropdown.
3. Click “Generate” to create a draft letter with information merged from the SmartForm and review activities.
4. Click on the draft letter link to save the letter to your computer
5. Edit the letter as needed
6. Upload the revised letter to the system via ‘upload revision’
7. Select ‘ok’

Prepare Letter

You can generate, upload, and revise a letter to the investigator here.

- **Generate a draft letter from a template:**
[Dropdown menu with 'Approval' and 'Closure' options]
- **Draft letter:**
[Correspondence_for_IRB12-0024.doc\(0.04\)](#)

- Send the Letter:

1. Click the “send letter” activity.
The “send letter” activity will only appear after a letter has been generated.
2. Select ‘ok’
3. The system will process the submission; changing the state of the submission and if appropriate will copy the approved SmartForm and documents to the main study workspace.

Send Letter

Determination: Approved / Exemption Granted
Correspondence letter: [Correspondence_for_IRB13-0856.pdf\(0.01\)](#)

NOTE: *This sometimes takes a moment and when the system has completed the task, the pop up will disappear. Do not close the pop up before the task is complete.*

