



## Uploading Documents


Certain pages of the SmartForm allow users to upload relevant documents.

- Many pages ask the user to upload very specific information (Informed Consent/HIPAA documents, Drug or Device info, etc.).
- The last page of the SmartForm allows users to upload any additional relevant documents.

**Important!** Study documents which are to be included in the review **MUST** be attached to the appropriate space of the SmartForm.

### To Upload a Document to the SmartForm

1. Navigate to a page of the SmartForm where an attachment is required.
2. Click the “Add” button:



Attach supporting files, naming them as you want them to appear in the approval letter:  
Use Add to upload a new document, Update to upload a revised version of a listed document, and Delete to remove a document.

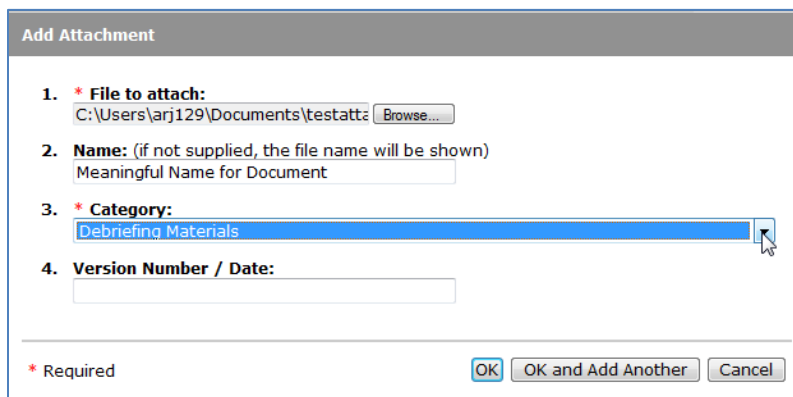
Document	Category	Date Modified
<input type="button" value="Add"/>		
<input type="button" value="Update"/> another document(0.01)	Other	10/16/2013
		<input type="button" value="Delete"/>

3. Click the “Browse” button in the pop up and select the document from your computer.

#### Recommendations:

- Attachments should have a minimum ¼ inch (6.35 mm) margin on all sides.
  - Attachments created via the Microsoft Office Suite and Adobe work best in the system.
  - Some errors may occur when attaching documents in plain text or open source word processing programs.
  - Do not use the special characters: ampersand & percent % or dollar \$ in the file name.
- Do not attach:
- Files that end with .txt or .exe (potentially “executable” files).
  - Emails saved in an email format, such as .msg. Please save emails as a PDF or Word document before attaching within the system.

4. Add the document Name, if you’d like it to appear differently than the file name.
5. If applicable, select the “Category” of document that you’re uploading
6. If you have a specific version number or date that you would like to appear, enter that in the “Version Number/Date” field.



The 'Add Attachment' dialog box contains the following fields:

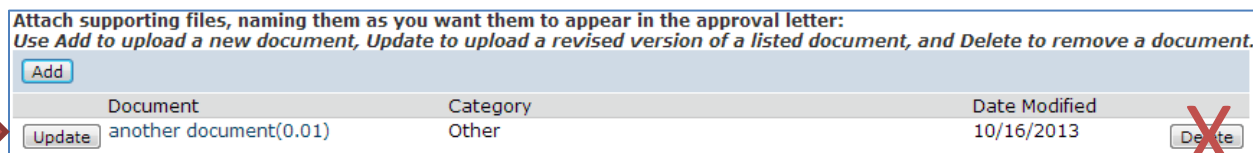
- 1. **\* File to attach:** C:\Users\arj129\Documents\testattt Browse...
- 2. **Name:** (if not supplied, the file name will be shown) Meaningful Name for Document
- 3. **\* Category:** Debriefing Materials
- 4. **Version Number / Date:**

Buttons at the bottom: OK, OK and Add Another, Cancel. A legend indicates \* Required.

7. Click "OK" or "OK and Add Another" when finished.

### Modification

In a modification, to keep track of old versions, select the **"Update"** button if you are uploading a new version of the document. Click the "Add" button (and follow the instructions above) to add an entirely new document to the SmartForm.



Attach supporting files, naming them as you want them to appear in the approval letter:  
Use Add to upload a new document, Update to upload a revised version of a listed document, and Delete to remove a document.

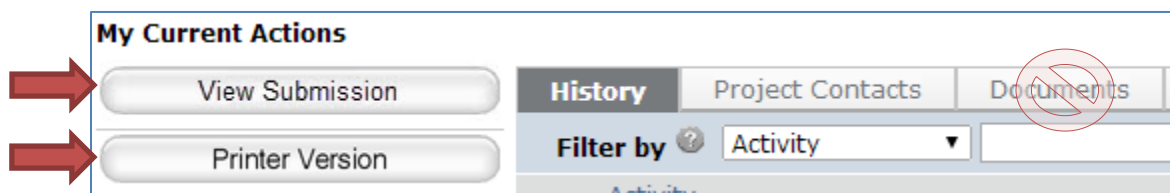
	Document	Category	Date Modified	
Add				
Update	another document(0.01)	Other	10/16/2013	Delete

**Do not "Delete" a document, unless you are no longer using it or any version of it in your study.**

### Continuing Review

Documents associated with a Continuing Review are specific to the progress of the study. Any revisions to currently approved materials (such as the protocol or consent forms) must be submitted via a separate modification request.

Documents attached to the Continuing Review SmartForm will not appear on any documents tab in the submission workspace. To access documents attached to a Continuing Review, please use the "view submission" or "printer version" buttons on the left of the workspace.



The 'My Current Actions' section includes:

- Buttons: View Submission, Printer Version
- Tabs: History, Project Contacts, Documents (marked with a red X)
- Filter by: Activity



## Report of New Information

Documents associated with a Report of New Information (RNI) are specific to the report. Any revisions to currently approved materials (such as the protocol or consent forms) must be submitted via a separate modification request.

Documents attached to the RNI SmartForm will may not appear on the documents tab of the submission workspace. To access documents attached to the RNI, please use the “view RNI” or “printer version” buttons on the left of the workspace.

