

ERM Quick Guides

How to Roles and Share Roles

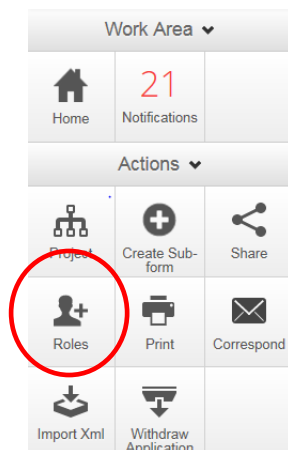
Roles: Assign access to your project

In ERM, the project owner can make the project available to others e.g. sponsors or colleagues.

Using the **Roles+** function, the project owner assigns other research team members pre-defined levels of access to the Project

Give access

Select **Roles+** button under the Actions panel



A dropdown list will display the different levels of access to the HREA


Please refer to

ERM QLD APPLICANT ROLES – PERMISSIONS for more information

- Enter the collaborator's email address and select the level of access

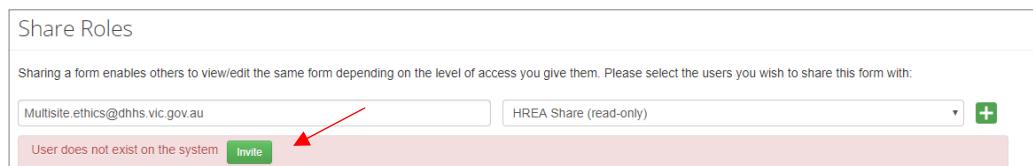
 A screenshot of the 'Share Roles' dialog box. It contains a text field for 'Collaborator email' and a dropdown menu for selecting the level of access. The dropdown menu is open, showing several options: 'HREA Share (read-only)', 'HREA Share (read-only)', 'HREA Share (read, write)', 'HREA Share (read, create subforms)', and 'HREA Share (read, write, submit)'. A green '+' button is next to the dropdown. At the bottom, there are 'Share Role' and 'Close' buttons. A note at the bottom left states: 'Note: This form has not yet been shared with anyone'.

Select **Share Role** button

Other research team members can be added using the  button

If the collaborator does not have an ERM account

- A message will be displayed if the collaborator's email does not exist in ERM

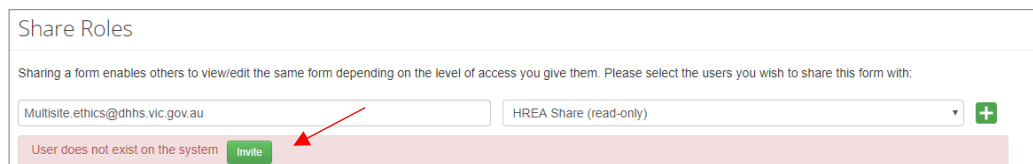


❓ Select **Share Role** button

❓ Other research team members can be added using the **+** button

Select the **Invite** button to invite the collaborator to create an ERM account

- A message will be displayed if the collaborator's email does not exist in ERM



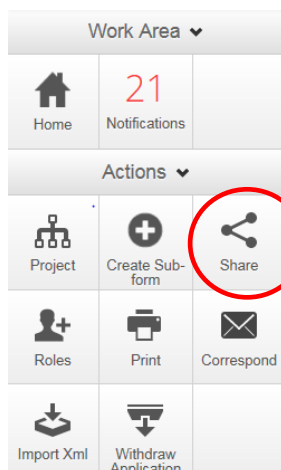
Select the **Invite** button to invite collaborator to create an ERM account

The collaborator will receive an email notification inviting them and a link to ERM to create an account

NOTE you can amend collaborator permissions see **Manage Collaborator Permissions**

Sharing: Assign access to your project

Using the **Share** function, the project owner or form owner (creator of the form) can share a form with other research team members.



Select **Share** button under the Actions panel

Enter the collaborator's email address and select the level of access

- **Read** – view application (but not edit)
- **Write** – view and edit application
- **Submit** – submit application (on behalf of CPI/PI)
- **Share** – ability to share application with other collaborators on behalf of the CPI/PI
- **Create all sub forms** – create reports relevant to this application
- **Receive notifications** – refers to notifications displayed on ERM homepage

Please note if a form has been shared through multiple levels of people for each level there will be multiple levels of share permissions to selected. For example, Project owner shared with PI who then shared with an associate investigator who wants to now wants to share with a second associated investigator.

They will need to tick all three read options in the share to enable the second associate investigator to be able to read This is something that is being looked out to be changed in the future.

Manage Collaborator Permissions

The project owner and investigators with access to share the project with others, can edit the permissions of collaborators

- Open the relevant application, then click Collaborators

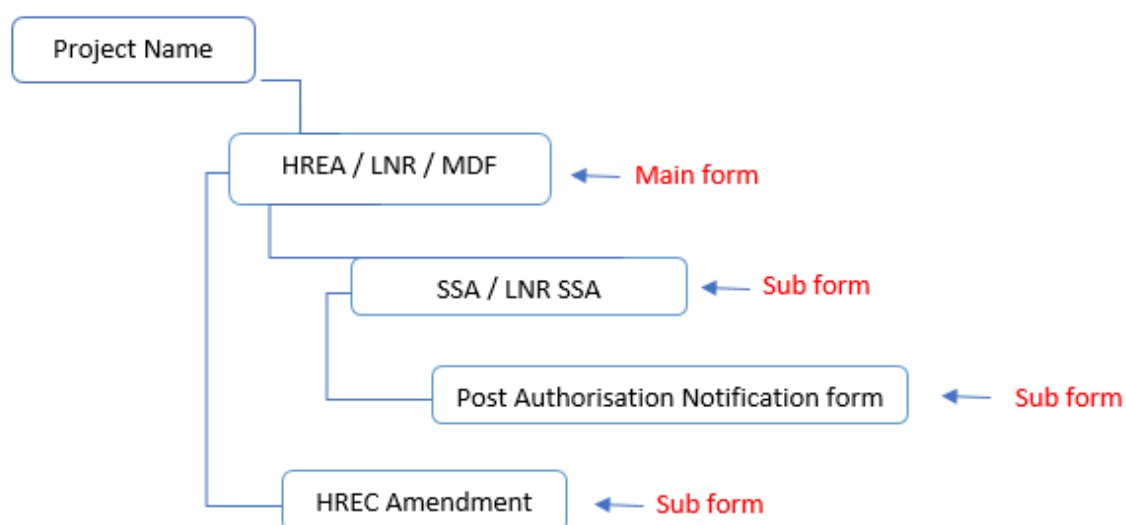
- Click Edit Permissions on the righthand side of the relevant investigator.
- Select/de-select the relevant share options. Click Save

ERM Form Architecture

ERM is based on **forms**. The project title layer is automatically created at the same time the applicant creates a **main form**.

From the **main form**, the applicant can create **sub-forms** e.g. SSA form, progress report.

From some sub-forms (SSA and LNR SSA) further sub-forms can be created e.g. site progress report, complaints report and site notification form



Main Forms (There is only one main form for each project.)

| Form | Description |
|--|---|
| Human Research Ethics Application (HREA) | Ethics application form |
| Low/Negligible Risk Application Form (LNR) | Ethics application form for low or negligible risk research |
| Minimal Dataset Form (MDF) | Proxy for an ethics application form; used when the ethics review was performed in a state/territory that does not use ERM; allows creation of SSA form(s) in ERM |

Sub-forms for post-approval HREC

| Form | Description |
|---|---|
| HREC Amendment QLD | Request ethical approval for a change to the design or conduct of a research project e.g. the protocol, PICF or change to personnel |
| Project Final Report QLD | Report to the reviewing ethics committee on the progress of a research project at the time of its completion |
| Safety Report QLD | Report a safety event to the reviewing ethics committee |
| Annual Safety Report QLD | Report to the reviewing ethics committee on the safety profile of an interventional clinical trial |
| Serious or Suspected Breach Report | Report a serious or suspected breach to the reviewing ethics committee |
| Site Closure Report Multi Centre Research QLD | For a multi-site project, report the closure of one participating site to the reviewing ethics committee |

Sub-forms for initial application Main Form (site specific)

| Form | Description |
|---|---|
| QLD Site Specific Assessment (SSA) | Research governance application form; one SSA is required for each site participating in a research project |
| Low/Negligible Risk Site Specific Assessment (LNR SSA) | Research governance application form; one LNR SSA is required for each site participating in a research project |

Sub-forms for Post Authorisation (RGO)

| Form | Description |
|--------------------------------------|--|
| SAE/SUSAR/SADE Rpts | Report SAE/SUSAR/SADE to the site's research governance office |
| Post Authorisation Notification Form | Report a research project amendment to the site's research governance Office |

ERM QLD APPLICANT ROLES - PERMISSIONS

Note: Permissions only apply to forms down the branch and up the tree from the form where it is given.

| APPLICANT ROLE | Column1 | DESCRIPTION |
|--|--|--|
| *Full Project (read only) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role to only read all forms in the project. No other access is allowed. |
| *Full Project (read, subforms) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role to read, and create subforms in all QLD in all project forms and subforms (except some data migrated forms). |
| *Full Project (read, write, subforms, share) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role to read, write (edit), share, create subforms and receive notifications in all QLD project forms and subforms (except some data migrated forms). |
| *Full Project (read, write, subforms, share, submit) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role to perform the same actions as the Project Owner, full access (read, write, submit, share, create all sub forms, receive notifications), in all project forms and subforms (except some data migrated forms). |
| *Main forms (read only) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role to only read the QLD main forms. No access is given to the subforms of the main forms. |
| *Main forms (read, subforms) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role to read and create subforms in the QLD main forms. No access is given to the subforms of the main forms. |
| *Main forms (read, write, subforms, share) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role to read, write, share, create all subforms, receive notifications in the QLD main forms. No access is given to the subforms of the main forms. |
| *Main forms (read, write, subforms, share, submit) | HREA DM HREC MDF DM MDF LNR Form | This role allows the recipient of the role full access (Read, Write, Submit, Share, Create all sub forms, Receive notifications) in the QLD main forms. No access is given to the subforms of the main forms. |

| | | |
|--|--|---|
| *Subforms (read, write, subforms.share.submit) | LNR Form HREC Amendments Qld Safety Report Form Qld Annual Safety Report Qld Project Progress Report Qld Site Closure Report Form Multi Centre Research Qld Project Final Report Qld Breach - Serious or Suspected - Report Form (HREC) Qld Amendments, Reports & Notifications (HREC) RED HREC Post Approval SSA Form Qld SSA MDF (all versions) LNR SSA | <p>This role allows the recipient of the role to have full access (read, write, submit, share, create all sub forms, receive notifications) in the subform where it is given and all subforms of this form (except some data migrated forms). Read and create subforms are allowed in the main forms.</p> <p>Note: Permissions only apply to forms down the branch and up the tree from the form where it is given.</p> |
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