

EthOS: Uploading Documents

Descriptive Video Transcript

Time	Narration	Visual Descriptions
00:00	Hi everyone, let's take a look at how to upload and manage documents in EthOS.	A slide with the EthOS logo and title of the training video
00:08	There are many different types of documents you'll upload as part of a new application but for this example, let's assume I want to upload a consent form. I'm going to navigate directly to the question that asks for this.	- The user opens a main form application in EthOS - The user navigates to the Informed Consent section of the main form application - The user navigates to the Informed Consent question
00:20	If a document is needed, I just click the blue upload document button and select the document from my File Manager. In this example, I'm uploading a Consent Form, and I'll call it Version 1 since this is my initial application.	- The user clicks a blue Upload Document button - The Documents – Consent/Assent: Prior Informed pop-up window appears - The clicks a blue Browse button and selects a file from Windows File Manager - In the pop-up window, the user enters the date and a Version Number (1) and clicks the green Upload button - A green Save Complete banner appears at the top of the screen
00:34	So that was pretty easy, but what happens if after I submit the application, the REB asks me to make some changes?	The slide transitions to show an email that the user received from the REB informing them that modifications have been requested on their application
00:44	Here I am back in the same application which is now in a Modifications Requested status. I can navigate to each required change using the Reviewer Comments link. Here I'm being taken directly to where I previously uploaded my consent form because they've asked me to change some wording in it.	- The user is on the main page of their application - The user highlights the Modifications Requested status - The user highlights the Reviewer Comments link in the Overview pane on the right

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		- The Overall Reviewer Comments pop-up window appears, and the user clicks on the feedback - The user is taken directly to the question where the consent form document was previously uploaded
01:05	For changed documents, you'll need both a final (clean) version and also a copy that shows the edits you made, called the tracked version – so make sure you have both of these available.	- The user clicks the blue Browse button and selects a new clean version, entering a new date and version number (2) then clicks the green Upload button - A green Save Complete banner appears at the top of the screen
01:16	Follow the same steps as before: clicking the upload button and selecting the file, entering the new date, and version number, and doing this for each of the clean and tracked versions as per the prompts in the form.	- The user repeats the steps and selects the tracked version, entering a new date and version number (2) then clicks the green Upload button - A green Save Complete banner appears at the top of the screen
01:42	But one key step is easy to miss: delete the previous versions. You can do this before or after uploading the replacements, but it's important to remove anything that is no longer current.	- The user finds the previous version (1) and clicks the red Delete button - A green Save Complete banner appears at the top of the screen - The document is removed from the uploaded attachments list
01:56	So now let's fast forward to when my application has been approved and my research has begun. What happens if <i>my</i> team decides to make a change to the consent form? In this case, I will unlock the approved application and prepare an amendment.	- The screen transitions and we are back at the main form application which has now been Approved - The user clicks the Unlock to Amend button - The Unlock to Amend pop-up window appears and the user clicks Yes to confirm their decision to unlock
02:12	Once unlocked, you would follow the same steps: navigate to the question which has the document you need to change. In the case of an amendment, you'll see your earlier versions uploaded.	The user navigates to the Informed Consent section of the form and finds the question with the previously uploaded documents
02:31	Now just upload the amended document, remembering to enter a new date and an updated Version number (in our case,	The user clicks the blue Upload document and selects the amended, clean document, and enters a new

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	Version 3). Upload the tracked version as well. And, as we've mentioned already, delete anything that is no longer relevant from previous uploads or submissions.	date and version number (3), then clicks the green Upload button • The user repeats the steps to upload the tracked version • Finally, the user finds the previous (version 2) copies of the clean and tracked documents and clicks on the red Delete button beside each of them • Each time a user uploads or deletes a document a green Save Complete banner appears at the top of the screen
03:15	So that's it for managing your documents. Just remember to prepare both clean and tracked copies, and make sure your submission only includes the most current versions.	• A slide appears repeating the key information
03:28	Check out the EthOS Hub for all other support resources. Thanks for watching and have a great day!	• Transition to the final slide with the EthOS logo and a QR code for the EthOS Hub