

1.26.3 Minor Configuration Release Items: December 2022

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Icons below indicate the application(s) impacted by the enhancement.



ESTR-IRB



Agreements-DUA

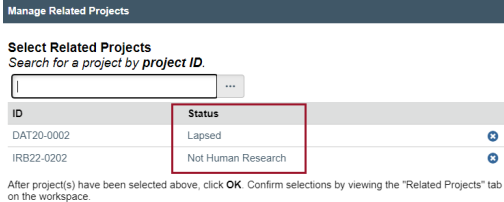
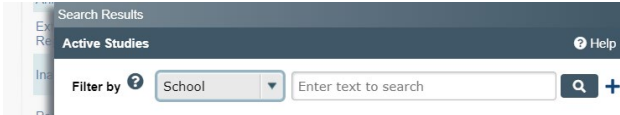


Data Safety



OAIR

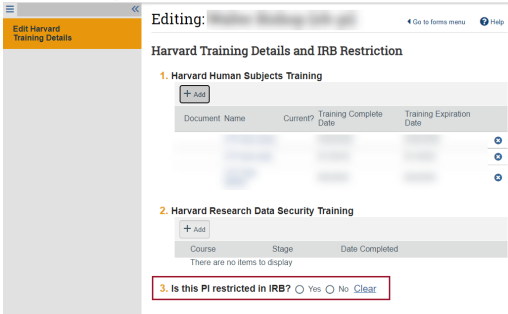
Cross-Suite Enhancements

What has changed...	What it means...	How it looks (as applicable) ...
SmartForm		
Department selection enhancements   	The following department is additionally visible for accurate selection across the suite: HMS-Wyss	
Additional status displays when relating projects   	Project status now appears when selecting a related project on the Manage Related Projects activity to help provide additional context for correct linkages.	
Miscellaneous		
Reports extension: update 'filter by' setting   	Bug fix to ensure reports may be filtered as expected.	
Organizations: Add the ability to track Organizations from other databases/ systems   	Organizations now have a source ID which will allow for easier organization management and data alignment with other Harvard systems.	

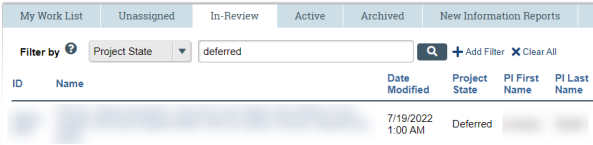
What has changed...	What it means...	How it looks (as applicable) ...
Integration: Enable background features to enhance future integration 	A background feature of the application is now enabled so that additional options for system integration are available for future design.	
Integration: Populate GMAS data across the suite. 	A background feature of the application is now enabled so that GMAS records can be selected in any application. This exists in ESTR-IRB and is newly added for Agreements-DUA and Data Safety.	

What has changed...	What it means...	How it looks (as applicable) ...
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SmartForm		
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Person Training: Show PI restrictions field for edit	IRB staff can access Harvard Training Details for each person and this view now allows for the management of restriction status, as appropriate.	
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Workspace		
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Fix the In Review tab to display Harvard information	This change corrects a bug where the IRB>In Review tab did not display items in the Deferred status.	
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Miscellaneous		
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Letter: Populate disapproval letter with correct merge fields	- Corrected bug to ensure merge fields used as part of generating the disapproval letter display the correct review information. - Added help text to the committee review activity to support entry of information in anticipated activity fields.	
Security: Limit ability for IRB staff to add contacts	Removed the option to create non-Harvard contacts via activity.	

Agreements-DUA Enhancements

What has changed...	What it means...	How it looks (as applicable) ...						
SmartForm								
Only active persons may be added to a record	Selection lists to add a person (such as a team member) will now only list individuals with an active Harvard ID. Note that existing team members who change status from active to inactive will still display, if they were already associated with a record.							
Agreement upload field shows as required	The upload of a document or the request for Harvard to create a draft has always been required but the visual indicator (red asterisk) is now visible on-screen.	3. * Upload agreement draft: (or check the box below) [None]  Upload Mark here if no agreement to upload or for Harvard to generate first draft. ☐						
New field prompt for agreement description	The description entry on the form is now required and the prompt clarifies that this same description may be used in the agreement.	6. * Description of the project and how the data will be used. This description may be used in the agreement.						
New instruction at the time of contracting party organization write-in	The prompt for writing in a contracting party name now clarifies to find the organization from the selection option first (if possible). At least one is required: selection of an organization or write-in.	1. * Select the contracting party:  ... * If you cannot find the organization in the list above, enter contracting party name: 						
New question to associate a GMAS record with the Agreements-DUA review	New questions* After indicating that there is sponsored funding for the project, sub-questions have been revised to: a) describe the relationship and b) associate any relevant GMAS records. Linked GMAS records indicated on this page of the SmartForm are also listed on the “Related Projects” tab of the workspace.	5. * Are there any sponsored funding sources for this project? ☒ Yes ☐ No Clear * Describe the relationship between the sponsored project and this Agreement, including any contractual obligations that may impact this Agreement or the underlying data: * List any proposal, award, or ISRA, that has been submitted to a sponsored programs office (SPA, ORA, OSP, or OTD), including any federal, foundation, industry or other sponsored funding for this project: ... <table><tr><th>Project #</th><th>Segment Status</th><th>GMAS Link</th></tr><tr><td>View 223312-01</td><td>Active</td><td>223312-01 </td></tr></table>	Project #	Segment Status	GMAS Link	View 223312-01	Active	223312-01 
Project #	Segment Status	GMAS Link						
View 223312-01	Active	223312-01 						
* New required questions additionally impact records which are not yet submitted or are in review. Responses need to be filled in prior to completing the submit activity or prior to submitting changes/response during review.								

What has changed...	What it means...	How it looks (as applicable) ...						
SmartForm								
New question to associate a GMAS record with the Data Safety review	The new question allows the research team to associate any relevant GMAS records to the review when editing the SmartForm. Linked GMAS records indicated on this page of the SmartForm are also listed on the “Related Projects” tab of the workspace.	1. List any grant proposal that has been submitted to the sponsored programs office (SPA, ORA, or OSP), any proposal that was created in GMAS, or any federal or other sponsored funding supporting work captured in this submission: <table><tr><th>Project #</th><th>Segment Status</th><th>GMAS Link</th></tr><tr><td>View 223312-01</td><td>Active</td><td>223312-01 </td></tr></table>	Project #	Segment Status	GMAS Link	View 223312-01	Active	223312-01 
Project #	Segment Status	GMAS Link						
View 223312-01	Active	223312-01 						
Notification								
Add Comment notice template missing context	This change fixes a technical error to ensure the content of comments also appear in any notice sent.	To:  Link:  PI:  Department: Center for Education Policy Research [CEPR] The following comment has been added to this submission. Click the link above to access submission details. This is my informative comment on the workspace that I would like to also include in my email message. This is a system notice, please do not reply. Harvard Research Data Management: Tools and Resources for Researchers Office of the Vice Provost for Research: Research Management and Guidance Harvard University Information Technology: Enterprise Security						
Discontinue notice of related project update	For reviewers, since the status of associated projects is not a review dependency, the notification on related project update was unnecessary and will no longer be sent.							
Activity								
Discard: Add ability to not move forward with review of a submission by discarding with reason	When discarding, the person completing the activity will now be required to select the closest appropriate reason for the discard. Notes or documents can still also be added to the activity for additional reference.	Document Date Modified There are no items to display 3. * Select the reason for discard: ☐ Information provided in the submission is incomplete or does not meet requirements ☐ University unable to meet regulatory or data provider requirements or standards ☐ Review no longer needed Clear  Following discard, if the review needs to be re-initiated: • For Initial Submissions: complete the "Copy Submission" activity to make edits and re-submit for review. • For any Amendment, Amendment/CR, or Continuing Review: complete Create Amendment/CR from the initial/main record to recreate and submit for review.						
Approve: Fix bug to ensure correct date displays on approval of a converted follow-on	For reviewers, this fixes the error where the current expiry date displayed rather than the new expiry date.							

What has changed...	What it means...	How it looks (as applicable) ...
SmartForm		
Added additional information about selected organizations to the Disclosure SmartForm	Previously when the discloser selected an organization that is already in the OAIR system, additional information, such as whether the organization is foreign, would not display on the SmartForm. Now more complete organization information will be available to reviewers for selected organizations, as well as for write-in organizations. This information will not display to disclosers.	Organization General Information 1. Organization/Entity Name: National Academy of Sciences   Organization Information (read-only) Is this organization publicly traded? ☐ False Is this organization for profit? ☐ Is this organization a foreign entity? ☐ No or If you cannot find the organization in the above list, enter the name as text here:
Notifications		
Added GMAS project details to research certification draft reminders	For research certifications still in draft status, reminders to the discloser will now include the name and number of the project associated with the certification.	 To:  Link:  Action Required: Please submit your Outside Activity and Interest Report for this research project Project:  Title:  You have not yet submitted a required report of related outside activities and financial interests for the above-referenced research project. This report must be completed to proceed with any further sponsored award related actions. To complete this report: - Click on the link above - Choose "Edit Disclosures" (on the left) - Review, update, confirm, and save information in the form - Exit the form and click the "Submit Disclosures" activity on the left side of the screen If you think that you have received this reminder in error, please contact oirhelp@harvard.edu.
Activities		
Added Withdrawal Reason to the Withdraw activity form	When a reviewer withdraws a certification, they will be required to indicate a reason for the withdrawal.	Withdraw * Select the reason for withdrawal: ☐ Discloser did not complete the certification ☐ Certification no longer needed ☐ Other Clear

What has changed...

Added Update Organization activity to allow reviewers to modify Disclosure organization details

What it means...

Reviewers will be able to use this activity to modify information about the organization associated with a disclosure. Reviewers will be able to

- Change write-in organization information,
- Change a write-in organization to a database organization,
- Change a database organization to a write-organization, and
- Change a database organization to another database organization.

When updating organization information, reviewers will be required to provide a reason for making the change.

How it looks (as applicable) ...

Replace Organization

Update the organization associated with this disclosure.

Current Organization: Company

If the organization exists in the database, please select or update it.

or

Edit the write-in organization information.

Organization name:

Is this organization publicly traded?
☒ Yes ☐ No [Clear](#)

Is this organization for profit?
☒ Yes ☐ No [Clear](#)

Is this organization a foreign entity, i.e. organized outside the United States?

* Why are you making this change?

Certifications with disclosure removals only will be routed to Administrative Review

Previously if the only change to disclosures were disclosure removals, a certification would not be routed for review. Now disclosure removals will trigger reviews, in addition to new disclosures and disclosure updates.

Workspace

Added Withdrawal Reason to the Summary tab of the Certification Workspace

When a certification has been withdrawn, the reason will display on the Summary tab of the Certification to reviewers only.

Type: Disclosure Update | ID: DC00008545 Discloser:

Summary History

School:

Last COI training date: 11/3/2022

Certification snapshot:

Date certification created: 11/4/2022 5:11 PM

Date certification submitted: 11/4/2022

Reviewer/Office Contact:

Withdrawal Reason: Certification no longer needed

Reports

Added Update Organization report to allow reviewers to modify Disclosure organization details

Added a new report **Harvard Report: Update Disclosure Organization** to allow reviewers to modify Disclosure organization details. The new Update Organization activity can be accessed and completed from this report.

Miscellaneous

Investigators removed from projects will no longer be included as annual disclosers

Previously, if a person was removed as an investigator from a project that requires discloser, they would still be included in the annual discloser population because of their prior association with that project. Now if an investigator is removed from a project, they will no longer be required to disclose annually because of that project.