

## Converis Amendments Quick Sheet - Researcher

For more information see the <u>Ethics Forms, Policies and guidelines</u>
For guidance and ethical considerations specific to questions in the see the <u>Guidance Notes</u>

### **Getting Started**

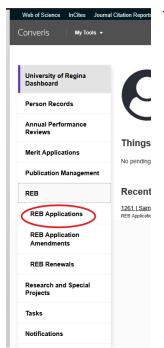
Click <a href="https://uregina.converis.clarivate.com/">https://uregina.converis.clarivate.com/</a> to log into Converis with Novell credentials.

Once logged in, users are taken to their user dashboard where basic information about the user is displayed, you can see notification about your current Applications, amendments or renewals and make changes right there. There is also a left tab showing various access options.



#### The Process

Role: To make amendments, you must be a Researcher. The role is shown in front of the user's name on the top right of your screen.

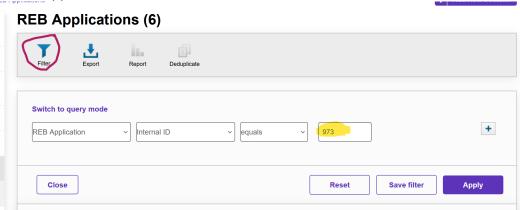


To begin an amendment

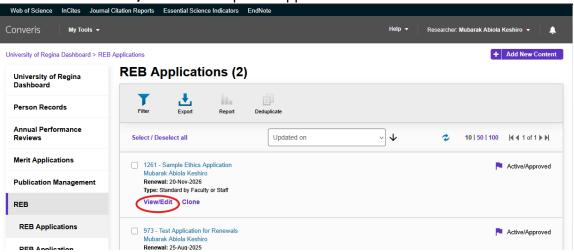
- On the left tab, click on "REB"- Related options will show below
- Click "REB Applications"

#### Once in "REB Applications"

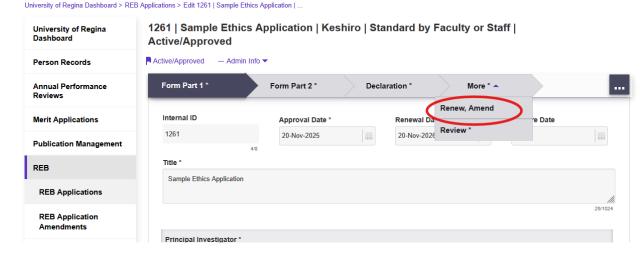
- Find the approved Application you would like to Amend. You can use filter and search to find your application, using its ID or you can scroll and find the application
- Click on "Filter" (you might need to click on reset first) and type in the number of your application:



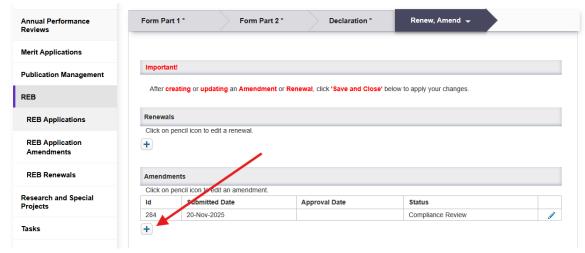
Click on "view/edit" on the specific application.



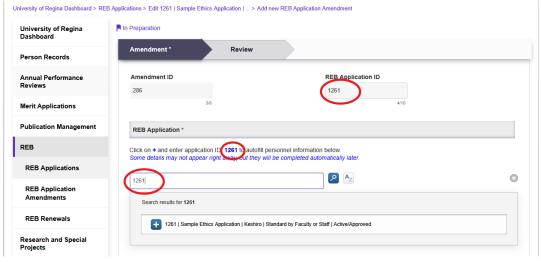
Once within the application, click "More" and then "Renew, Amend".



#### Click the "+" icon under the Amendments section

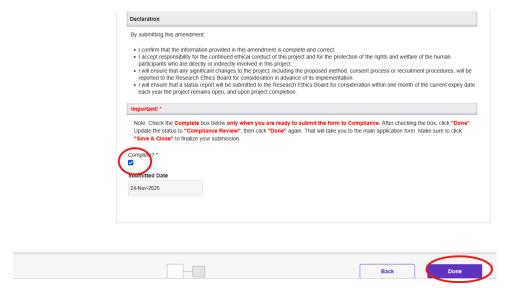


After the amendment has been created, you **MUST** search for the Application ID related to your REB application and link it. Click the "+" for the application to be linked.

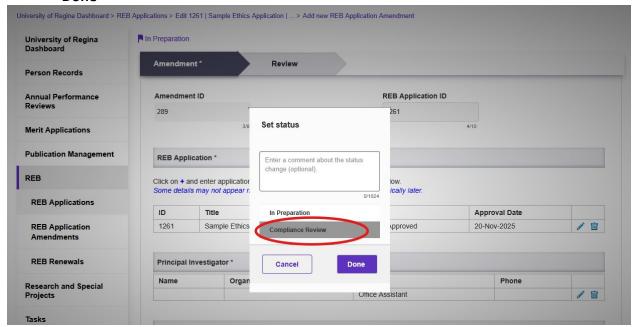


Note: Some details may not appear right away, but they will be completed automatically later.

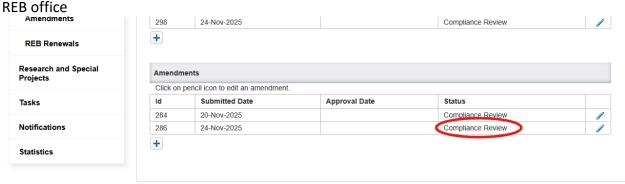
- Fill in other fields as needed and select the check mark next to "complete?"
- > Click "Done.

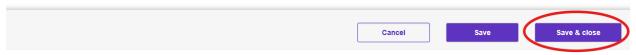


Then in the "Set Status" pop up, change the status to "Compliance Review". Click "Done"



Once the status has been moved to "Compliance Review", you MUST select "Save and Close" below to apply your changes. If this step Is NOT done, it will not send the amendment to the





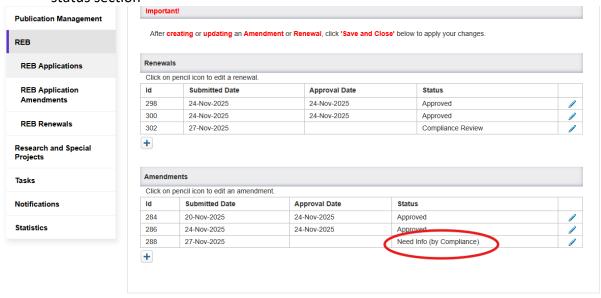
#### The Review Process

After you've clicked "Save & Close" to change the status to "Compliance Review" it will go to a Compliance Officer for review.

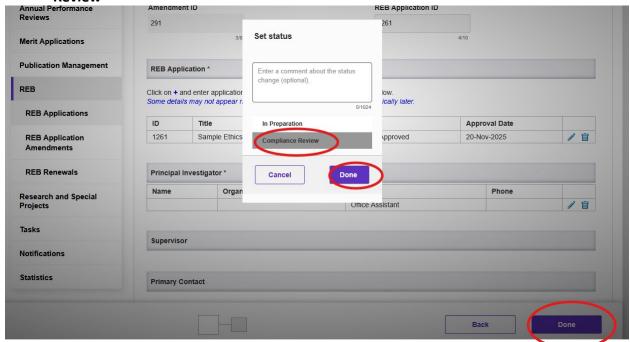
# If the Compliance Officer needs More Information/ How to Check Amendment Status

You should get a notification email if the amendment is approved or needs more information. Go through the steps to get to the renew /amend tab as you did previously. Go to "REB" -> "REB Applications" -> "Filter" and search using your application Id -> click "view/edit" and "more" and then "Renew/Amend". You'll see the status for all amendments.

Click the pencil symbol next to the amendment with the status set to "Need info" in the status section



- > Fill in the information the Compliance Officer requested
- Click "Done" at the bottom right of the screen
- Click "Done", then in the "Set Status" pop up, change the status to "Compliance Review"



➤ Then click "Save and Close" to make sure your changes are saved and sent back for review. You MUST do this for changes to reflect

