Feature Updates for COUHES Connect
Exempt Evaluation

Departmental role, Funding Source Maintenance and En-Route list for Exempt Studies.
Funding source for Exempt Study

The Connect Exempt Evaluation tool now provides a method to maintain funding sources for exempt studies, and a method for authorized campus administrators to find and view the exempt determinations by Department/Unit. The En-Route tab displays your evaluations awaiting approvals.

- **Funding Source maintenance** window.
  - Only studies with exempt status can list the funding sources.

- **Department view** access for users to Exempt Evaluations.
  - Users with **IRB Department Viewer** role can view & look up Exempt Evaluations to view or add funding sources for Evaluations in their departments.
  - Adding the correct PI department to your Evaluation enables this administrator role based access.

- **En-Route tab** added to the Exempt Evaluation dashboard
  - Lists evaluations awaiting PI, Faculty Sponsor, or COUHES approval.
Department: Search Department Unit

When you search and add the Principal Investigator to an Exempt Evaluation, COUHES Connect provides a blank Department field.

Search & add the department where your study will be managed.

The selection of department directly supports view & maintain funding source access for staff members with the IRB Department Viewer role for that department.
Elastic search lets you **start typing** a department **Name** or **Unit Number**, and the results list will populate and then filter out items that don’t match your entry.
Funding Source button for Exempt studies.
Access the Funding Source maintenance from:
- Exempt Evaluations, My Studies list
- Exempt Evaluations, My Studies > View mode
Click on $Funding Source$ to open the maintenance window.
Click in the Funding Type field to make a selection:

- **Award** allows you to search the KC Awards module for sponsor funded projects
- **Other** lets you enter a source of your own description for sources like start-up or discretionary accounts
- **Unit** lets you search the KC Unit/DLC database, to describe departmental funding sources
- **Institute Proposal** allows you to search the KC module for submitted sponsor funding proposals
- **Development Proposal** allows you to search the KC module for proposals in progress
- **Sponsor** lets you search the KC Sponsor database

Please use Award search to identify your federal, industrial, foundation and any other specific sponsor funded projects. Your OSP Contract Administrator needs to see your federal award listed as a funding source in an Exempt Determined Study (or full protocol) before they can release a compliance hold on a new award.
Funding Types

- Select a **Funding Type** and use the search provided.
- After selecting **Award** or **Unit**, the search field activates.
  - For **Award**, you can enter your name, account number, or title to build a selection list.
- For **Other** - you must enter something in ‘source’, but put the actual information in the **Description** field for this entry.
- Click the **+Plus** button to save the item as a funding source.

- While Development Proposal and Institute Proposal searches are provided, best practice is to use actual awarded funding sources, instead potential funding sources.
Once added to the list of sources, you can:

- **Edit** – use pencil to modify this selection (edit your description, search for a different type or source).
- **View** – use eye to open the linked record in that module. Use this to confirm you selected the correct item.
- **Delete** – use the trashcan to remove the item.
En-Route Evaluations

Use the En-Route list in your Exempt Evaluation dashboard to locate submitted evaluations.

• If you prepared an evaluation on behalf of a PI or Faculty Sponsor, it routes to the PI, then the Faculty Sponsor.
• If the system does not recognize PI Status, the evaluation routes to the IRB office.
Get Connect Roles

To get access to COUHES Connect, please ask your department’s Primary Financial Authorizer (usually your Administrative or Fiscal Officer) to grant you the IRB Department Viewer role in the Roles Database. [http://web.mit.edu/rolesdb/](http://web.mit.edu/rolesdb/)

For the Primary Financial Authorizer, please do the following:

- In the Create Authorization section:
- Locate the person requesting the role
- Select Category: KCOS – Kuali Coeus
- Select the Function Name: IRB DEPARTMENT VIEWER
- Look up and add a “Qualifier Code” – that’s the UNIT number to give access for the person to see the protocols & Exempt Evaluations. (This role automatically ‘descends the unit hierarchy’ – allowing view access to any/all sub-unit)
- Click create.