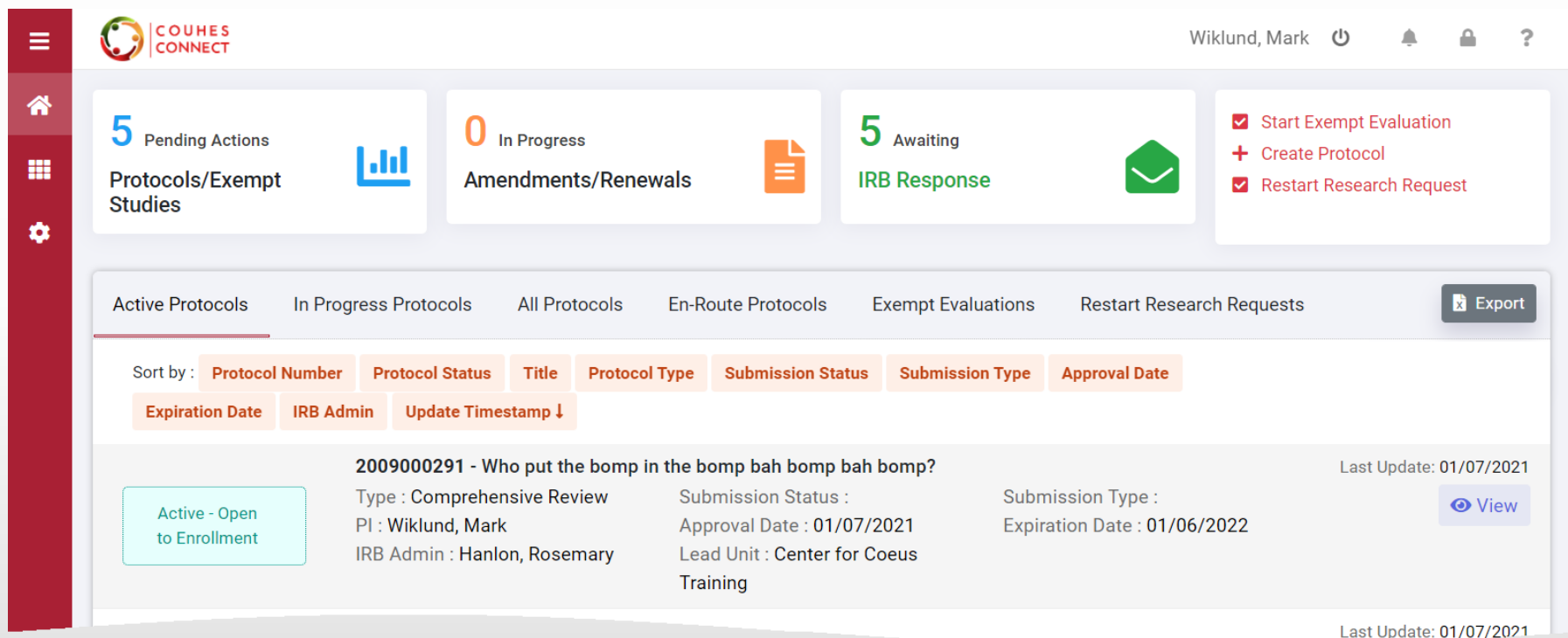


COUHES Connect Quick Reference Guide

Dashboard Navigation

Click on the COUHES Connect icon/hyperlink available on couhes.mit.edu

Or bookmark the link in your browser: <https://couhes-connect.mit.edu/connect>

The dashboard features a sidebar with navigation icons (Home, Dashboard, Settings) and a main content area. At the top right, the user is identified as 'Wiklund, Mark'. The main area contains several summary cards: '5 Pending Actions Protocols/Exempt Studies', '0 In Progress Amendments/Renewals', '5 Awaiting IRB Response', and a list of actions: 'Start Exempt Evaluation', 'Create Protocol', and 'Restart Research Request'. Below these is a filter bar with tabs for 'Active Protocols', 'In Progress Protocols', 'All Protocols', 'En-Route Protocols', 'Exempt Evaluations', and 'Restart Research Requests', along with an 'Export' button. A sorting menu is visible with options like 'Protocol Number', 'Protocol Status', 'Title', 'Protocol Type', 'Submission Status', 'Submission Type', 'Approval Date', 'Expiration Date', 'IRB Admin', and 'Update Timestamp'. A protocol entry is shown with details: '2009000291 - Who put the bomb in the bomb bah bump bah bump?', 'Type: Comprehensive Review', 'PI: Wiklund, Mark', 'IRB Admin: Hanlon, Rosemary', 'Submission Status', 'Approval Date: 01/07/2021', 'Submission Type', 'Expiration Date: 01/06/2022', and 'Lead Unit: Center for Coeus Training'. A 'View' button is present for this entry.

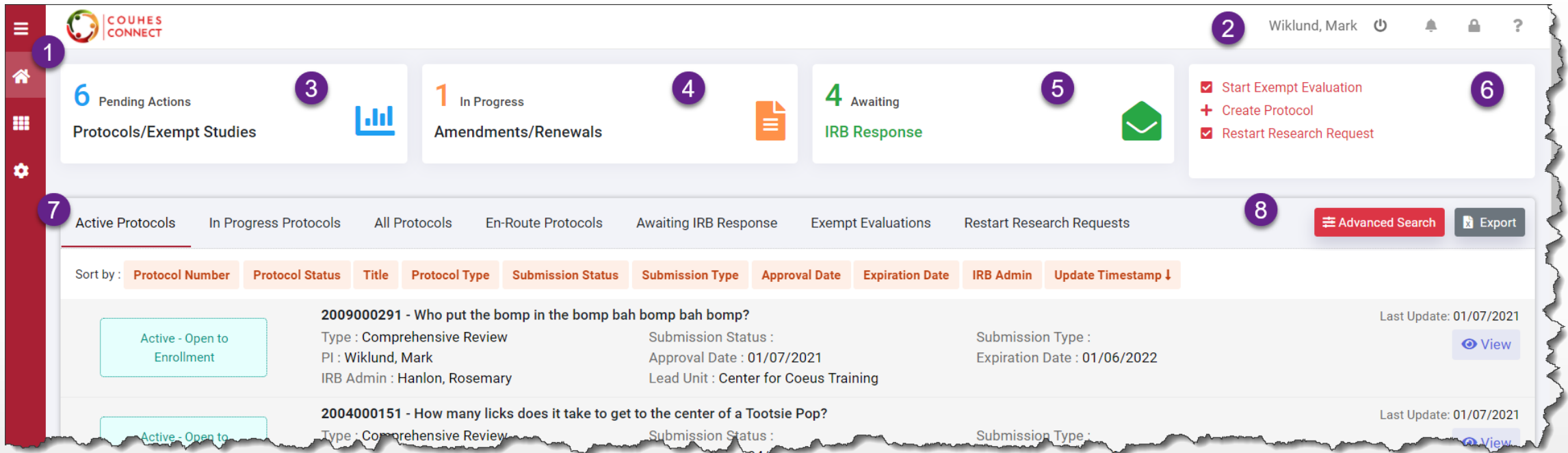
Welcome to COUHES Connect

You can use the COUHES Connect Dashboard to:

- ❖ Prepare and submit protocols for COUHES review
 - ❖ New/initial protocols
 - ❖ Amend/change existing protocols
 - ❖ Renew existing protocols
- ❖ As PI, Certify your protocol prior to COUHES review & approval
- ❖ View your previously approved Protocols
- ❖ Download protocol documents and approval letters
- ❖ Create and Complete an Exempt Evaluation for exempt-eligible research studies
- ❖ View current Exempt Evaluations: pending submission & completed
- ❖ As Department Head or Dean, approve protocols submitted for your scientific review.



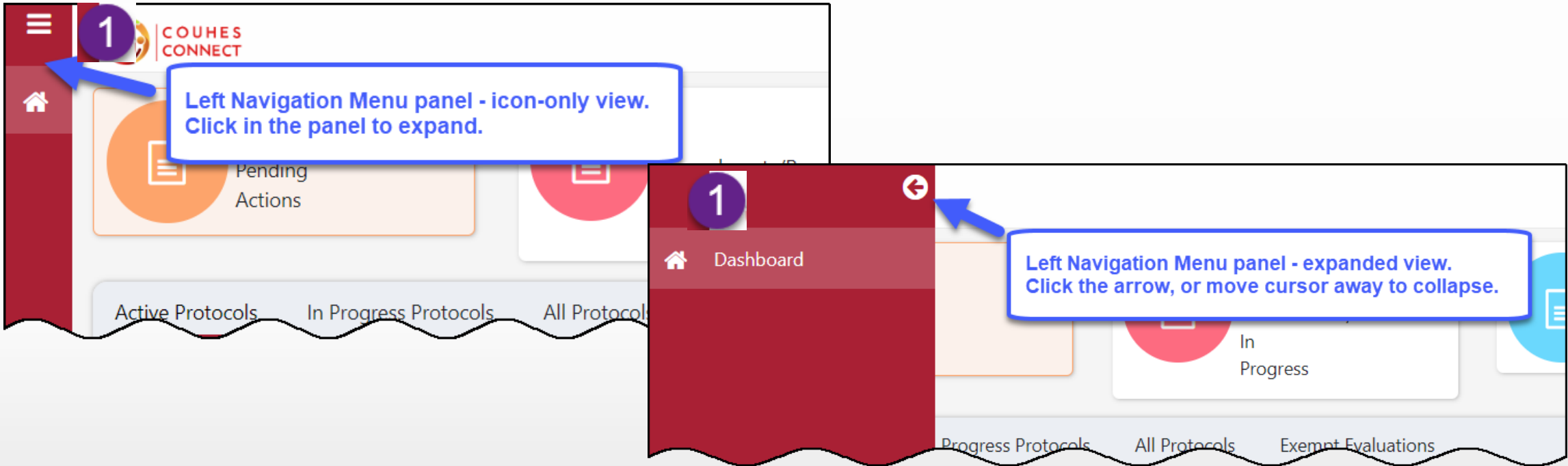
Dashboard basics...



The screenshot shows the COUHES CONNECT dashboard interface. It features a top navigation bar with a user profile (Wiklund, Mark) and a help icon. Below this is a row of four summary tiles: 'Pending Actions Protocols/Exempt Studies' (6), 'In Progress Amendments/Renewals' (1), 'Awaiting IRB Response' (4), and an 'Actions' tile (6) with options like 'Start Exempt Evaluation', 'Create Protocol', and 'Restart Research Request'. A central navigation bar (7) allows switching between views: Active, In Progress, All, En-Route, Awaiting IRB Response, Exempt Evaluations, and Restart Research Requests. Below this is a table with columns for sorting (Protocol Number, Protocol Status, Title, Protocol Type, Submission Status, Submission Type, Approval Date, Expiration Date, IRB Admin, Update Timestamp) and an 'Advanced Search' (8) button. The table lists two protocols with details like Type, PI, IRB Admin, and Submission Status.

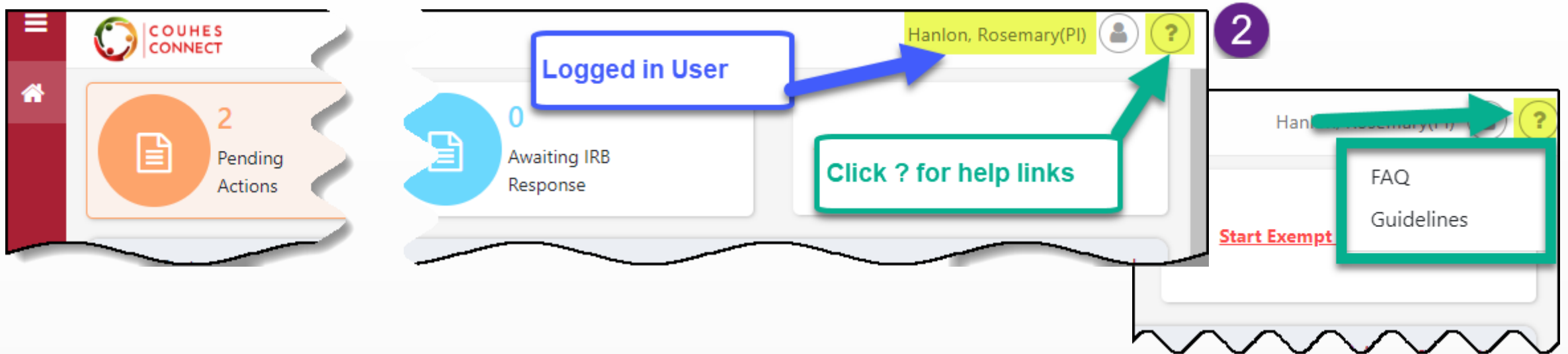
1. Left Navigation/home panel
2. Logged in User ID & Help icon
3. Pending (Protocol) Actions tile
4. Protocol Amendments/Renewals in Progress tile
5. Protocols Awaiting IRB Response tile
6. Actions tile: Exempt, New Protocol, or Restart Research
7. List Views: Click any header to display that list
8. Advanced Search tool

1. Left Navigation – Home panel



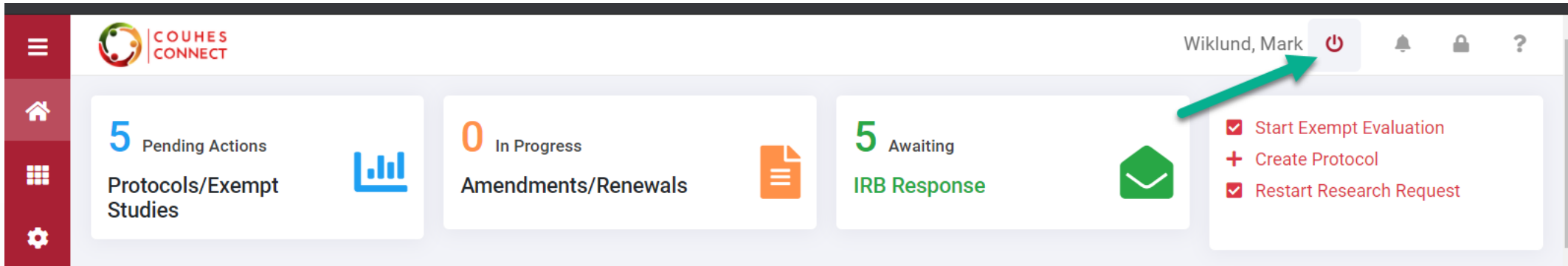
- ❖ The left Navigation Menu panel appears in all Connect screens in compact icon-only view.
- ❖ Click an icon to expand the panel to view the icon labels.
- ❖ Click the 'back arrow' or move your mouse away from the panel to compact the panel.
- ❖ More navigation options will present in later releases.


2 a. Logged In User & Help icon



- ❖ Users with Kerberos IDs and MIT Touchstone can access COUHES Connect: user name appears in the upper right.
- ❖ Users have access to protocols where they have a Study Role in a protocol, or specific permission.
- ❖ Users with the IRB Department Administrator role can view all protocols in the unit where the role is granted via the Roles Database by their Departments Primary Financial Officer.
- ❖ Click the (?) Help icon to open help link options
 - ❖ FAQ opens the couhes.mit.edu webpage to view answers to Frequently Asked Questions
 - ❖ Guidelines opens the couhes.mit.edu webpage where guides and quick cards like this are available to download.

2 b. Log out options



Wiklund, Mark 

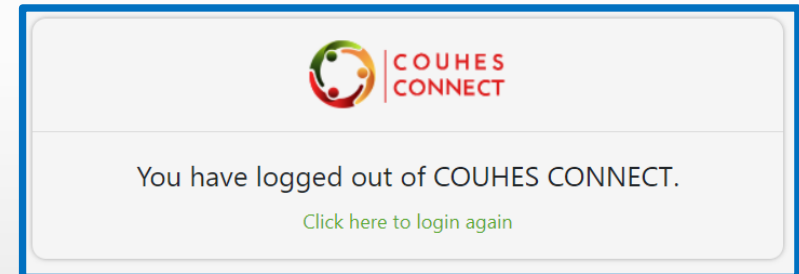
5 Pending Actions
Protocols/Exempt Studies


0 In Progress
Amendments/Renewals

5 Awaiting
IRB Response

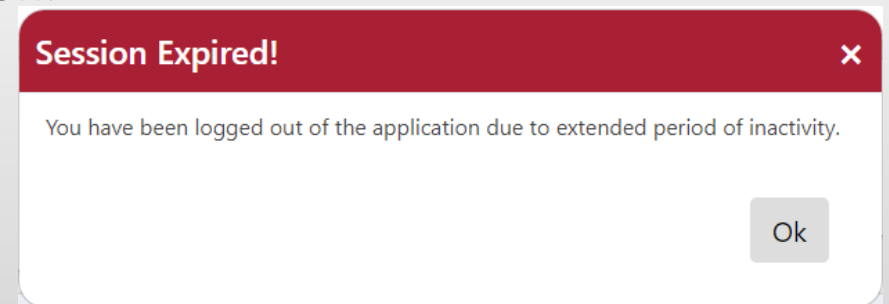
- Start Exempt Evaluation
- Create Protocol
- Restart Research Request

- ❖ Click on the ‘power’ icon to log out of COUHES CONNECT.
- ❖ Extended periods of inactivity will log you out of the application.



 **COUHES
CONNECT**

You have logged out of COUHES CONNECT.
[Click here to login again](#)



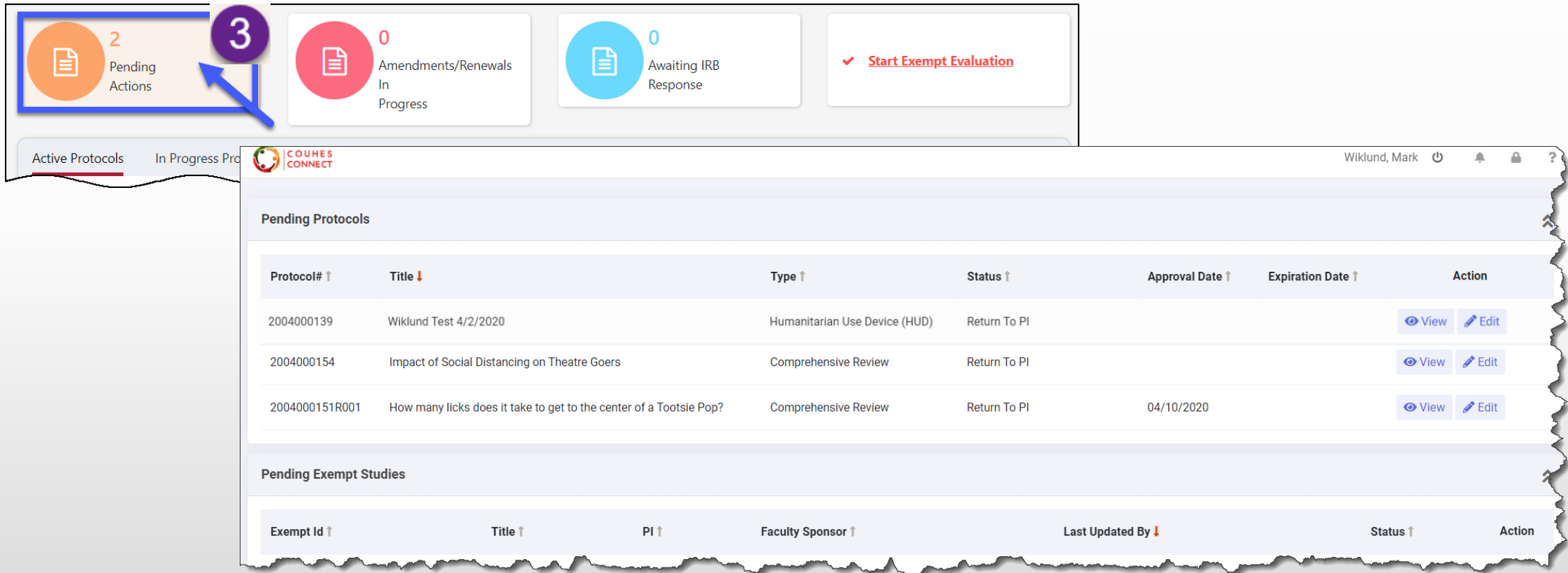
Session Expired! ✕

You have been logged out of the application due to extended period of inactivity.

Ok

3. Pending Actions tile

- ❖ The **Pending Actions** tile to present a list of protocols and exempt evaluations requiring attention.
- ❖ Click the **[View]** or **[Edit]** button in the Action column to open an item in that mode.
- ❖ Click the **Home** icon on the left navigation panel to return to your dashboard at any time.



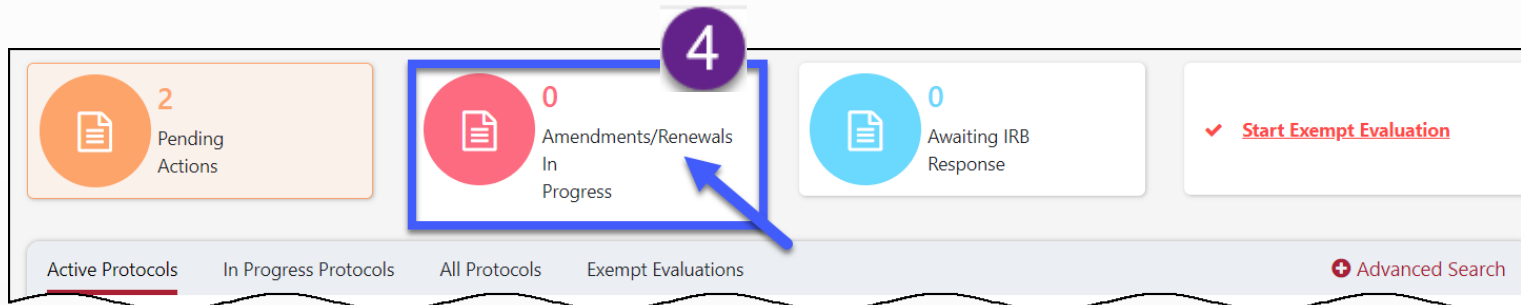
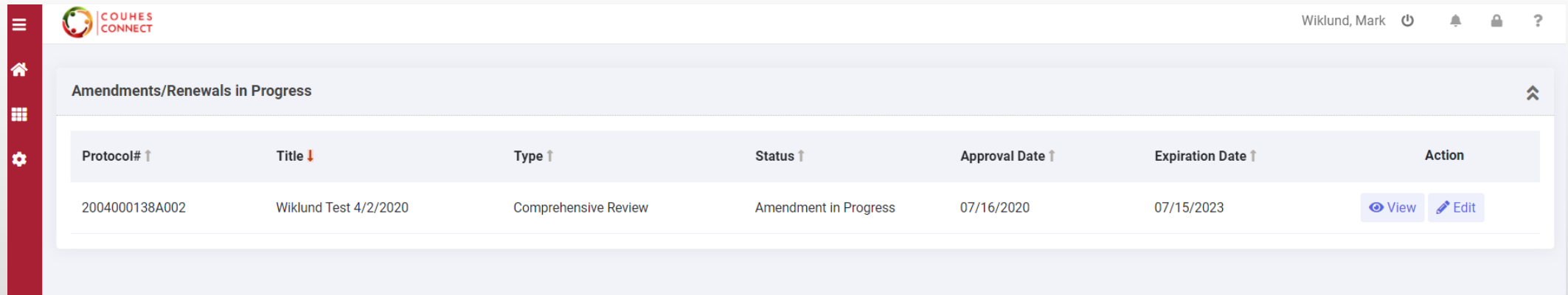
The screenshot shows the COUHES CONNECT dashboard. At the top, there are four tiles: 'Pending Actions' (2 items), 'Amendments/Renewals In Progress' (0 items), 'Awaiting IRB Response' (0 items), and a 'Start Exempt Evaluation' button. Below these is a navigation bar with 'Active Protocols' and 'In Progress Protocols'. The main content area is titled 'Pending Protocols' and contains a table with the following data:

Protocol# ↑	Title ↓	Type ↑	Status ↑	Approval Date ↑	Expiration Date ↑	Action
2004000139	Wiklund Test 4/2/2020	Humanitarian Use Device (HUD)	Return To PI			View Edit
2004000154	Impact of Social Distancing on Theatre Goers	Comprehensive Review	Return To PI			View Edit
2004000151R001	How many licks does it take to get to the center of a Tootsie Pop?	Comprehensive Review	Return To PI	04/10/2020		View Edit

Below the table is a section for 'Pending Exempt Studies' with a table structure including columns for Exempt Id, Title, PI, Faculty Sponsor, Last Updated By, Status, and Action.

4. Amendments/Renewals in Progress tile

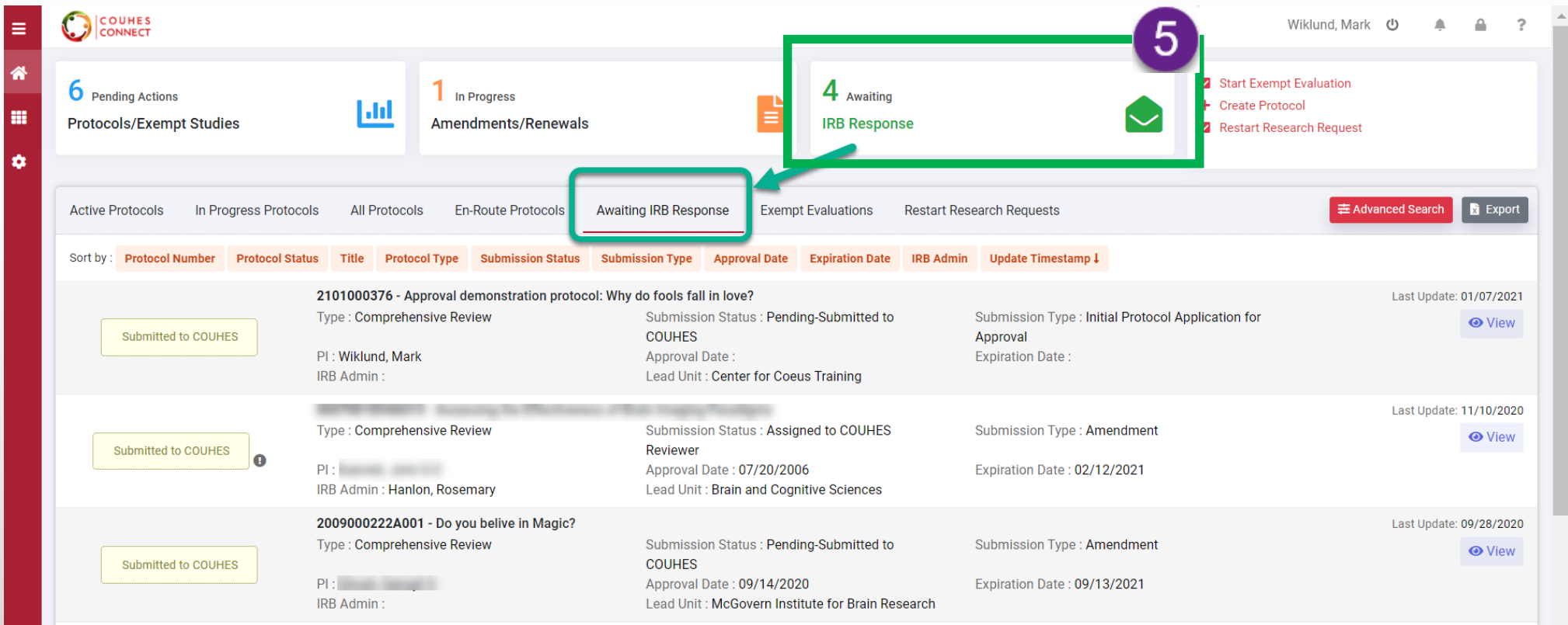
- ❖ The **Amendments/Renewals in Progress** tile to present a list of protocols that are in progress.
- ❖ Click the **[View]** or **[Edit]** button in the Action column to open an item in that mode.
- ❖ Click the **Home** button on the left navigation panel to return to your dashboard at any time.

Protocol# ↑	Title ↓	Type ↑	Status ↑	Approval Date ↑	Expiration Date ↑	Action
2004000138A002	Wiklund Test 4/2/2020	Comprehensive Review	Amendment in Progress	07/16/2020	07/15/2023	View Edit

5. Awaiting IRB Response tile

- ❖ Click the **Awaiting IRB Response** tile to insert a list of protocols undergoing COUHES review.
- ❖ Click the [**View**] button in the Action column to open an item in view mode.
- ❖ Click the **Home** icon on the left navigation panel to return to your dashboard at any time.

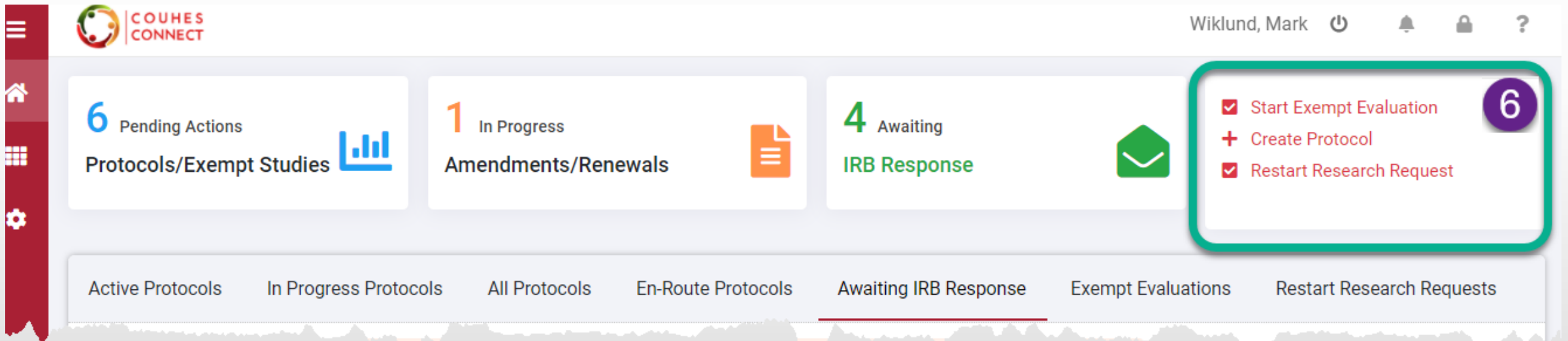


The screenshot shows the COUHES CONNECT dashboard. At the top, there are three summary tiles: '6 Pending Actions Protocols/Exempt Studies', '1 In Progress Amendments/Renewals', and '4 Awaiting IRB Response'. The 'Awaiting IRB Response' tile is highlighted with a green box and a purple circle with the number '5'. Below the tiles is a navigation bar with tabs: 'Active Protocols', 'In Progress Protocols', 'All Protocols', 'En-Route Protocols', 'Awaiting IRB Response' (highlighted with a red box and an arrow), 'Exempt Evaluations', and 'Restart Research Requests'. To the right of the navigation bar are 'Advanced Search' and 'Export' buttons. Below the navigation bar is a table with columns: 'Sort by: Protocol Number', 'Protocol Status', 'Title', 'Protocol Type', 'Submission Status', 'Submission Type', 'Approval Date', 'Expiration Date', 'IRB Admin', and 'Update Timestamp ↓'. The table contains three rows of protocol data, each with a 'Submitted to COUHES' status box and a 'View' button.

Sort by:	Protocol Number	Protocol Status	Title	Protocol Type	Submission Status	Submission Type	Approval Date	Expiration Date	IRB Admin	Update Timestamp ↓
	2101000376	Submitted to COUHES	Approval demonstration protocol: Why do fools fall in love?	Comprehensive Review	Pending-Submitted to COUHES	Initial Protocol Application for Approval			Wiklund, Mark	01/07/2021
		Submitted to COUHES		Comprehensive Review	Assigned to COUHES Reviewer	Amendment	07/20/2006	02/12/2021	Hanlon, Rosemary	11/10/2020
	2009000222A001	Submitted to COUHES	Do you believe in Magic?	Comprehensive Review	Pending-Submitted to COUHES	Amendment	09/14/2020	09/13/2021		09/28/2020

6. Action tile

- ❖ Click an Action hyperlink to begin that action:
 - ❖ The Exempt Evaluation begins with an Overview screen, with the options to ‘proceed’ to enter the study information or ‘cancel’ to return to the dashboard.
 - ❖ Click Create Protocol to prepare a new initial protocol.
 - ❖ Click Restart Research Request to open those lists and prepare your request.
- ❖ Click the Home button on the left navigation panel to return to your dashboard at any time.



The screenshot shows the COUHES CONNECT dashboard interface. At the top left is the COUHES CONNECT logo. The top right shows the user name 'Wiklund, Mark' and icons for power, notifications, lock, and help. The main dashboard area features several tiles: '6 Pending Actions Protocols/Exempt Studies' with a bar chart icon, '1 In Progress Amendments/Renewals' with a document icon, and '4 Awaiting IRB Response' with an envelope icon. A fourth tile, highlighted with a green border, contains a purple circle with the number '6' and three red checkmarks next to the following actions: 'Start Exempt Evaluation', 'Create Protocol', and 'Restart Research Request'. Below the tiles is a navigation bar with tabs: 'Active Protocols', 'In Progress Protocols', 'All Protocols', 'En-Route Protocols', 'Awaiting IRB Response' (which is underlined), 'Exempt Evaluations', and 'Restart Research Requests'. A red vertical navigation bar on the far left contains icons for home, grid, and settings.



7. List Views of Protocols and Exempt Studies

The screenshot shows the COUHES CONNECT dashboard. At the top, there are navigation tabs: 'Active Protocols', 'In Progress Protocols', 'All Protocols', 'En-Route Protocols', 'Exempt Evaluations', and 'Restart Research Requests'. A red box highlights the 'Active Protocols' tab and the search bar. To the right of the search bar are 'Advanced Search' and 'Export' buttons. Below the navigation is a 'Sort by:' dropdown menu with options: 'Protocol Number', 'Protocol Status', 'Title', 'Protocol Type', 'Submission Status', 'Submission Type', 'Approval Date', 'Expiration Date', 'IRB Admin', and 'Update Timestamp'. The main content area displays a list of protocols. The first entry is highlighted with a light blue background and includes a 'View' button. The entry details are:

- Protocol ID: 2009000291
- Title: Who put the bomp in the bomp bah bomp bah bomp?
- Status: Active - Open to Enrollment
- Type: Comprehensive Review
- Submission Status: [blank]
- Submission Type: [blank]
- PI: Wiklund, Mark
- Approval Date: 01/07/2021
- Expiration Date: 01/06/2022
- IRB Admin: Hanlon, Rosemary
- Lead Unit: Center for Coeus Training
- Last Update: 01/07/2021

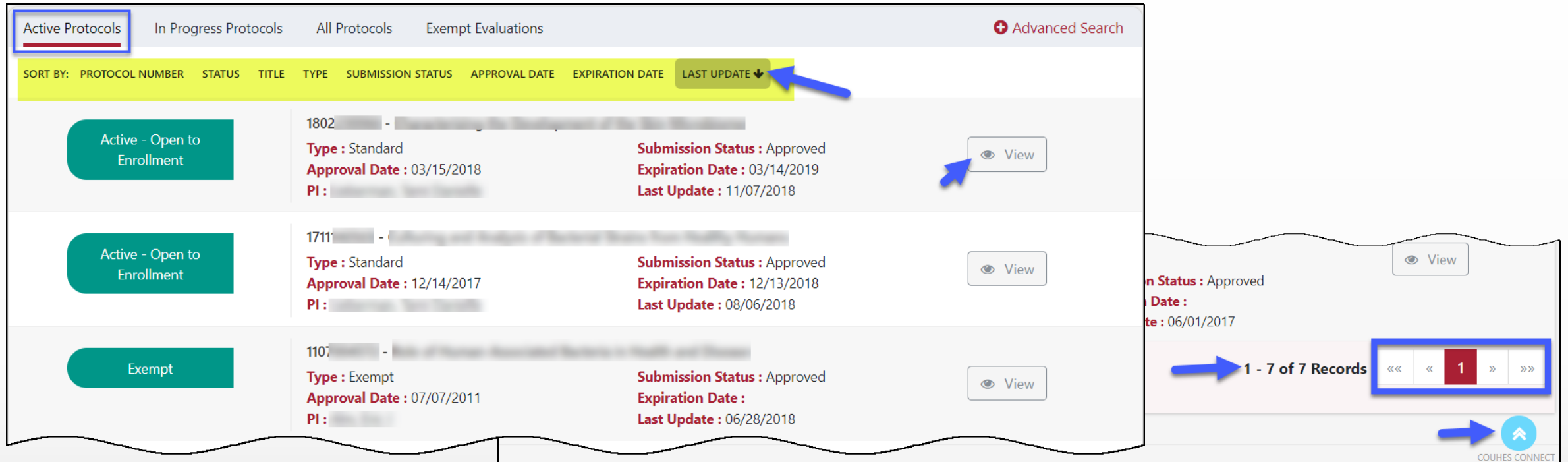
 Below this entry, another entry is partially visible: '38 - Wiklund Test 4/21/2020'.

The items appearing in these lists are based on the logged in user’s roles or access. User’s lists populate with protocols where they hold a role in the study or specific protocol permission.

- ❖ **Active Protocols:** protocols that are in statuses deemed as active (e.g. open to enrollment, data analysis only,)
- ❖ **In Progress Protocols:** protocols that are in a status where they can be modified.
- ❖ **All Protocols:** list of all protocols in all statuses. This list view provides a general search of all protocols maintained in the system.
- ❖ **En Route Protocols:** protocols awaiting Department Head or Dean’s Office Review
- ❖ **Exempt Evaluations:** provides access to pending and completed Exempt Evaluations.
- ❖ **Restart Research Requests:** Active protocols that may require restart requests.



7a. Active Protocol List Details



Active Protocols | In Progress Protocols | All Protocols | Exempt Evaluations | [Advanced Search](#)

SORT BY: PROTOCOL NUMBER | STATUS | TITLE | TYPE | SUBMISSION STATUS | APPROVAL DATE | EXPIRATION DATE | LAST UPDATE ↓

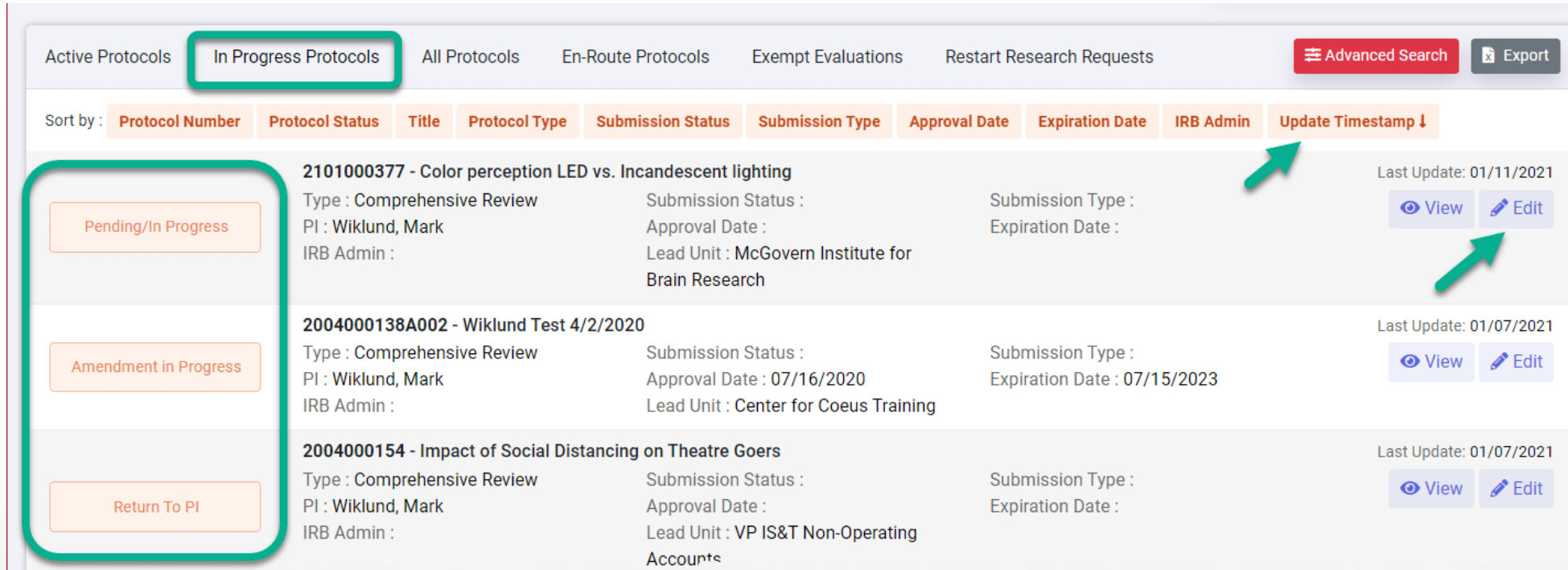
Active - Open to Enrollment	1802 - [REDACTED]	Type : Standard Approval Date : 03/15/2018 PI : [REDACTED]	Submission Status : Approved Expiration Date : 03/14/2019 Last Update : 11/07/2018	View
Active - Open to Enrollment	1711 - [REDACTED]	Type : Standard Approval Date : 12/14/2017 PI : [REDACTED]	Submission Status : Approved Expiration Date : 12/13/2018 Last Update : 08/06/2018	View
Exempt	1107 - [REDACTED]	Type : Exempt Approval Date : 07/07/2011 PI : [REDACTED]	Submission Status : Approved Expiration Date : Last Update : 06/28/2018	View

1 - 7 of 7 Records

[↑](#)

- ❖ The **Active Protocols** list field displays protocols in a deemed active state where the user holds a role.
- ❖ Click the [**View**] button to navigate to view this protocol's details and take **Actions** such as **Create Amendment** or **Create Renewal**, etc.
- ❖ Click on any of the **Sort By**: column headers to redisplay the items.
- ❖ Use the page selection tool at the bottom of the screen if your list exceeds the item limit.
- ❖ Use the '**go to top**' blue up arrow icon to quickly navigate to the top of this screen.

7b. In Progress Protocol List Details



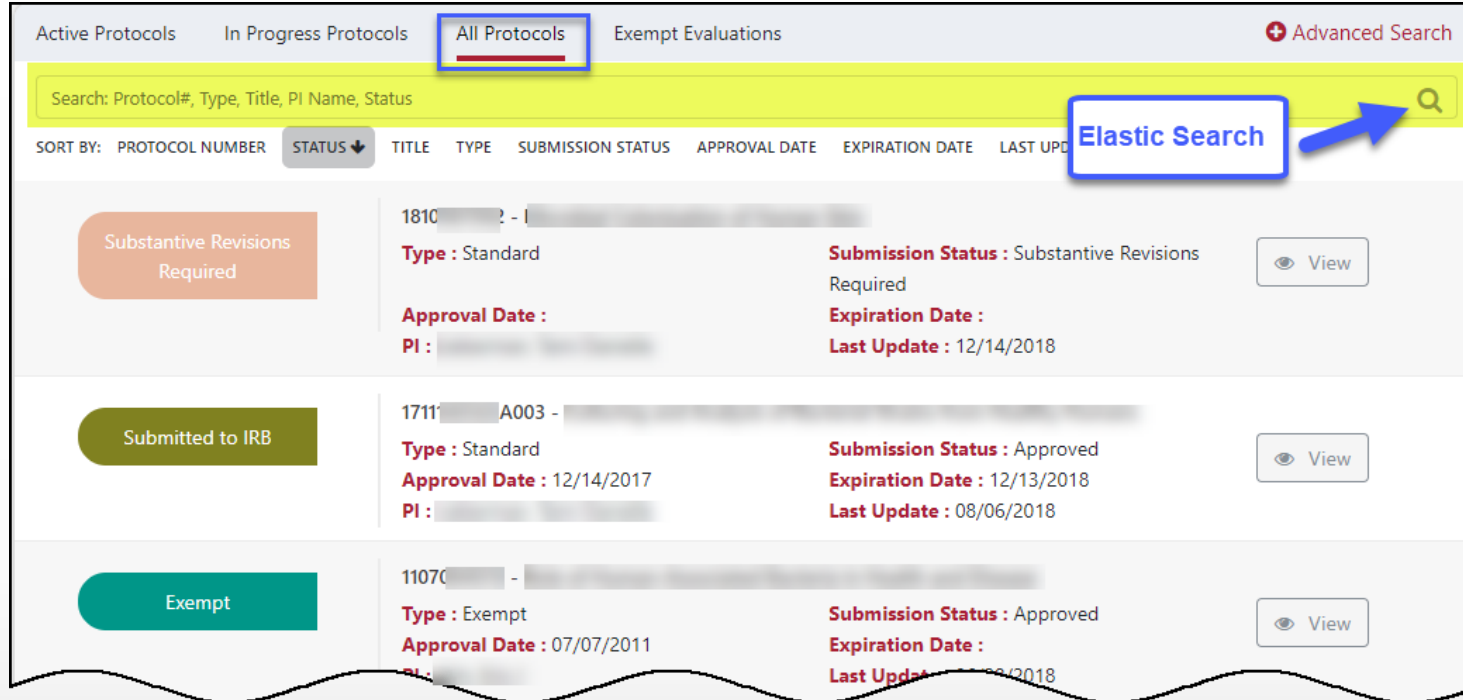
Active Protocols **In Progress Protocols** All Protocols En-Route Protocols Exempt Evaluations Restart Research Requests [Advanced Search](#) [Export](#)

Sort by: **Protocol Number** Protocol Status Title Protocol Type Submission Status Submission Type Approval Date Expiration Date IRB Admin **Update Timestamp ↓**

Pending/In Progress	2101000377 - Color perception LED vs. Incandescent lighting Type : Comprehensive Review PI : Wiklund, Mark IRB Admin :	Submission Status : Approval Date : Lead Unit : McGovern Institute for Brain Research	Submission Type : Expiration Date :	Last Update: 01/11/2021 View Edit
Amendment in Progress	2004000138A002 - Wiklund Test 4/2/2020 Type : Comprehensive Review PI : Wiklund, Mark IRB Admin :	Submission Status : Approval Date : 07/16/2020 Lead Unit : Center for Coeus Training	Submission Type : Expiration Date : 07/15/2023	Last Update: 01/07/2021 View Edit
Return To PI	2004000154 - Impact of Social Distancing on Theatre Goers Type : Comprehensive Review PI : Wiklund, Mark IRB Admin :	Submission Status : Approval Date : Lead Unit : VP IS&T Non-Operating Accounts	Submission Type : Expiration Date :	Last Update: 01/07/2021 View Edit

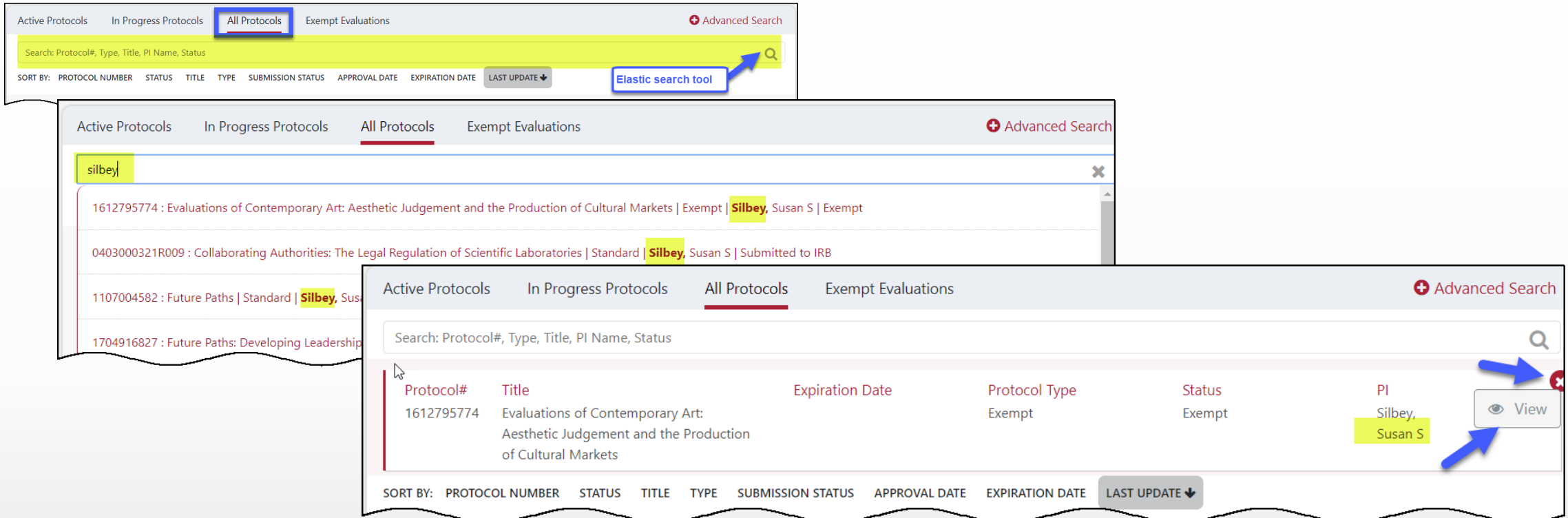
- ❖ **In Progress Protocols:** protocols that are in a status where they can be edited and submitted for review.
 - ❖ Note that In Progress includes all editable status protocols – new, amendments, renewals, returned, etc.
- ❖ Click the [**Edit**] button to open the protocol in edit mode to make your entries and submit.
- ❖ The default order is by most recent update timestamp. Click any button to resort, click a second time to reverse the order.
- ❖ Use the page selection tool at the bottom of the screen if your list exceeds the item limit.
- ❖ Use the ‘go to top’ blue up arrow icon to quickly navigate to the top of this screen.

7c. All Protocol List Details



- ❖ **All Protocols:** list of all protocols in all statuses.
- ❖ This list view provides a tool to search of all protocols maintained in the system.
- ❖ Like the prior lists, protocols appear where a user holds a role.
- ❖ Click the [**View**] button to navigate to the COUHES Connect view of this protocol's details (migrated from KC).
- ❖ Click on any of the **Sort By:** column headers to redisplay the items.
- ❖ Use the page selection tool at the bottom of the screen if your list exceeds the item limit.
- ❖ Use the 'go to top' blue up arrow icon to quickly navigate to the top of this screen.

7d. All Protocol List –Elastic Search tool



Active Protocols | In Progress Protocols | **All Protocols** | Exempt Evaluations | [Advanced Search](#)

Search: Protocol#, Type, Title, PI Name, Status

SORT BY: PROTOCOL NUMBER | STATUS | TITLE | TYPE | SUBMISSION STATUS | APPROVAL DATE | EXPIRATION DATE | LAST UPDATE

Elastic search tool

silbey

- 1612795774 : Evaluations of Contemporary Art: Aesthetic Judgement and the Production of Cultural Markets | Exempt | **Silbey, Susan S** | Exempt
- 0403000321R009 : Collaborating Authorities: The Legal Regulation of Scientific Laboratories | Standard | **Silbey, Susan S** | Submitted to IRB
- 1107004582 : Future Paths | Standard | **Silbey, Susan S** | Submitted to IRB
- 1704916827 : Future Paths: Developing Leadership | Standard | **Silbey, Susan S** | Submitted to IRB

Protocol#	Title	Expiration Date	Protocol Type	Status	PI
1612795774	Evaluations of Contemporary Art: Aesthetic Judgement and the Production of Cultural Markets		Exempt	Exempt	Silbey, Susan S

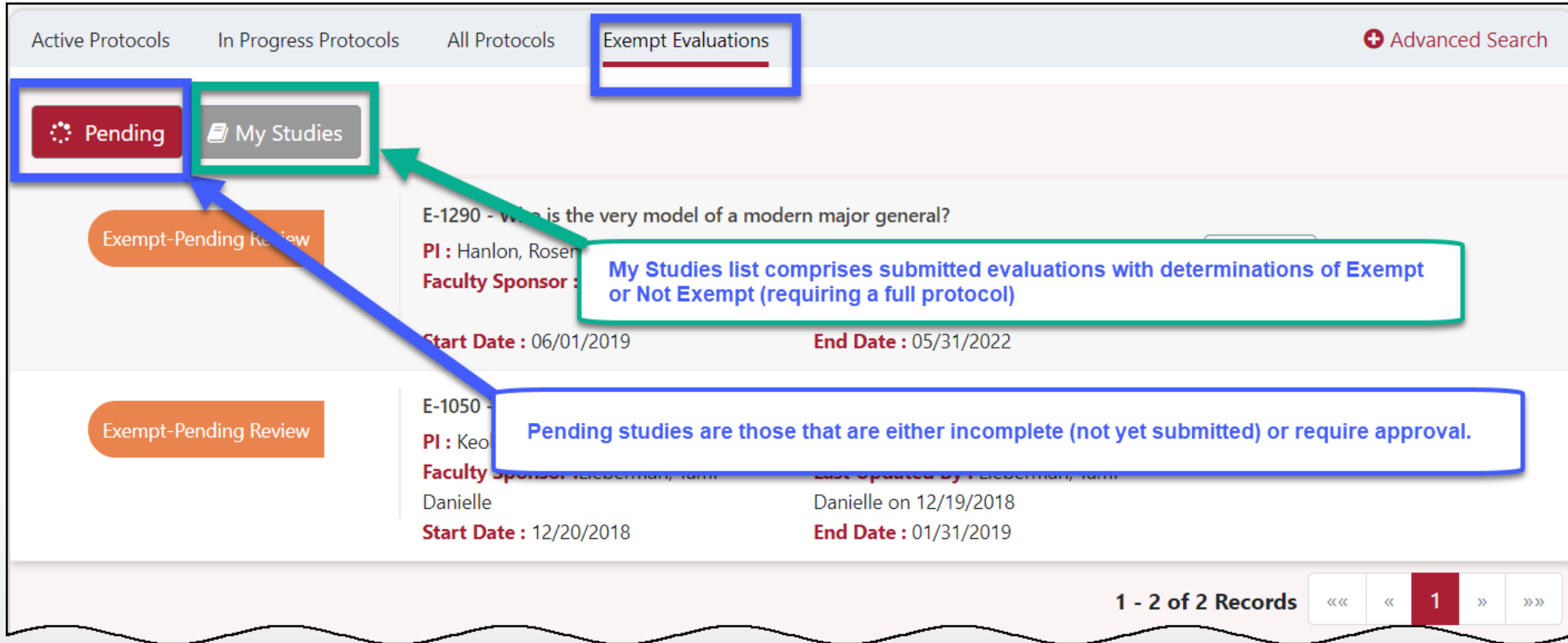
SORT BY: PROTOCOL NUMBER | STATUS | TITLE | TYPE | SUBMISSION STATUS | APPROVAL DATE | EXPIRATION DATE | LAST UPDATE

[View](#)

- ❖ The Search field on the All Protocol list view use ‘elastic’ search technology. Start typing in data for protocol number, type, title, PI Name or Protocol status and the tool will present matching items based on your entry.
- ❖ Click on any item to view the protocol summary details.
- ❖ Click on the **[View]** button to open* the protocol, or click the (x) to close the selected search result.

*Note: you may not be able to see the protocol detail if you are not the PI or do not have the IRB Department Administrator access for this protocol.

7e. Exempt Evaluation List Details



Active Protocols In Progress Protocols All Protocols **Exempt Evaluations** [+ Advanced Search](#)

Pending **My Studies**

Exempt-Pending Review

E-1290 - Who is the very model of a modern major general?
 PI : Hanlon, Rosen
 Faculty Sponsor :
 Start Date : 06/01/2019 End Date : 05/31/2022

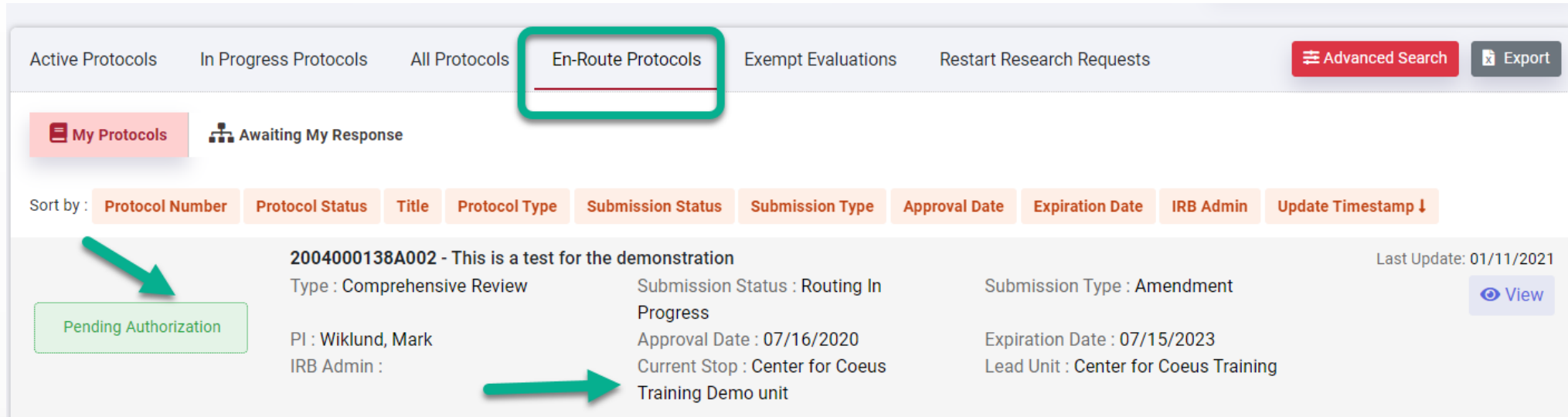
Exempt-Pending Review

E-1050 -
 PI : Keo
 Faculty Sponsor : Lieberman, Tam
 Danielle Danielle on 12/19/2018
 Start Date : 12/20/2018 End Date : 01/31/2019

1 - 2 of 2 Records <<< < 1 > >>>

- ❖ **Exempt Evaluations:** provides access to pending and completed Exempt Evaluations.
- ❖ Click **Pending** to view the Evaluations that are not yet complete (requires submitting or approval).
- ❖ Click **My Studies** to view the submitted studies with a determination of Exempt or Not Exempt, or Review Not Required.

7f. En-Route Protocols List Details



Active Protocols In Progress Protocols All Protocols **En-Route Protocols** Exempt Evaluations Restart Research Requests [Advanced Search](#) [Export](#)

[My Protocols](#) [Awaiting My Response](#)

Sort by: [Protocol Number](#) [Protocol Status](#) [Title](#) [Protocol Type](#) [Submission Status](#) [Submission Type](#) [Approval Date](#) [Expiration Date](#) [IRB Admin](#) [Update Timestamp ↓](#)

Pending Authorization

2004000138A002 - This is a test for the demonstration Last Update: 01/11/2021

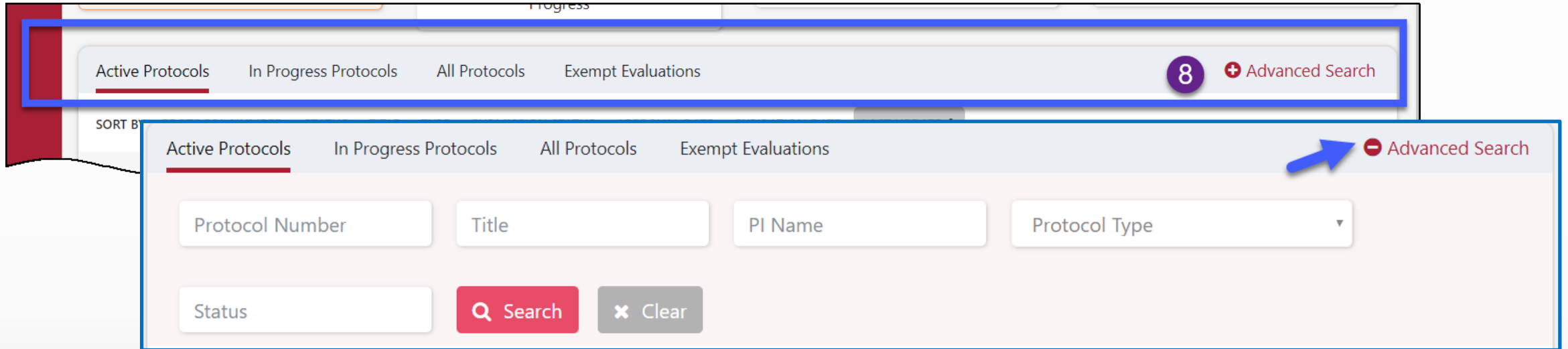
Type : Comprehensive Review Submission Status : Routing In Progress Submission Type : Amendment [View](#)

PI : Wiklund, Mark Approval Date : 07/16/2020 Expiration Date : 07/15/2023

IRB Admin : Current Stop : Center for Coeus Training Demo unit Lead Unit : Center for Coeus Training

- ❖ **En-Route Protocols List** view any protocols awaiting departmental review and approval.
 - ❖ For Department Heads and designated alternate reviewers, click **Awaiting My Response** to view any protocols requiring your approval.
 - ❖ The default view **My Protocols** lists submitted protocols in Pending Authorization status where the logged in user has a Protocol Role or permission to view.

8. Lists - Advanced Search tool



- ❖ Click **(+) Advanced Search** in a List screen to present search fields to search from the presented list items.
- ❖ For **Protocol Number, Title, or PI Name** - You can enter some or all of the relevant characters and then click the Search button.
- ❖ For **Protocol Type** – click in the field to see the list and select a value; then click the Search button.
- ❖ For **Status** – click in the field to present a window with the available statuses. Make a selection and click the **Search** button.
- ❖ Use the **Clear** button to restore the full list.
- ❖ Click **(-) Advanced Search** to close the search panel.

Questions?

<https://couhes-connect.mit.edu/connect>

- Questions about Protocols, Exempt Studies, or COUHES processes and practices, please contact the COUHES Staff. couhes@mit.edu

 617-2536787  couhes@mit.edu  couhes.mit.edu

- Questions regarding Connect navigation, general functionality, or feedback on documentation, please contact ra-help@mit.edu
- For Department IRB Administrator role assignment, please contact your Department's Primary Financial Officer.
- For difficulties with Touchstone, please contact servicedesk@mit.edu