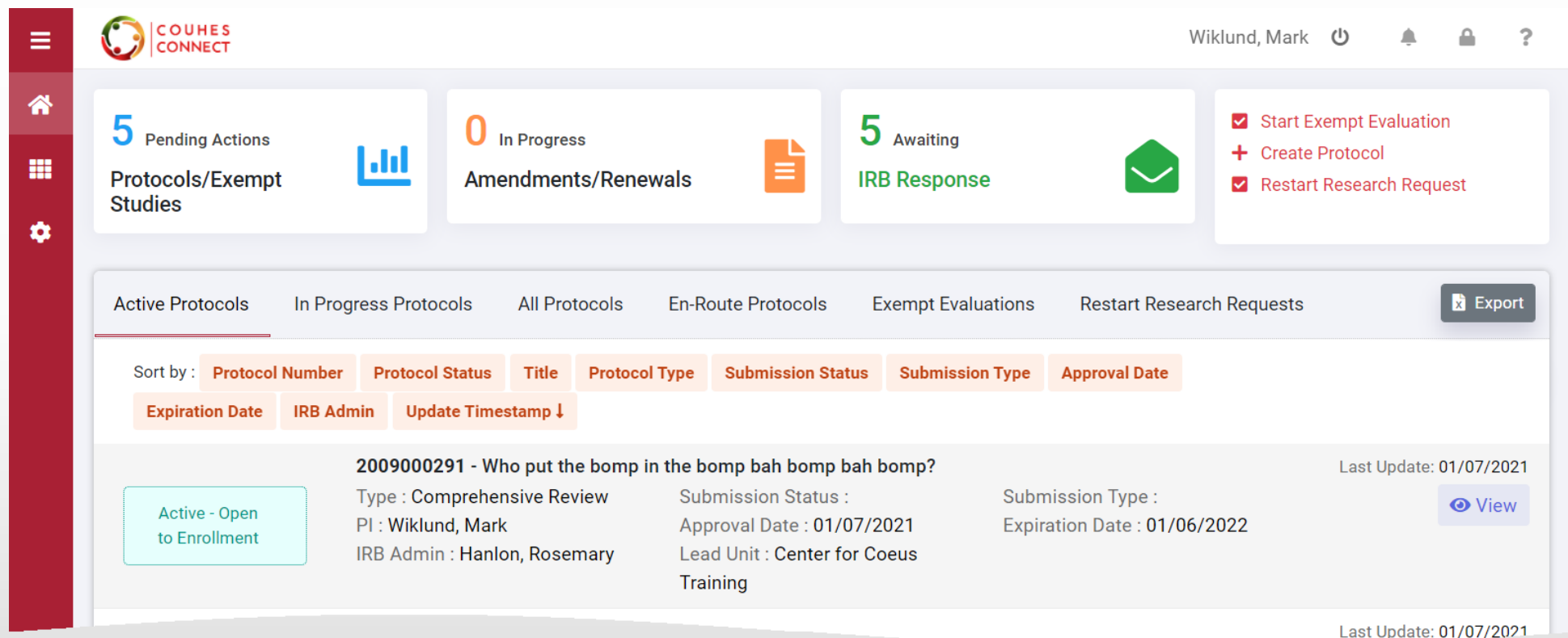


# COUHES Connect Quick Reference Guide

## Dashboard Navigation

Click on the COUHES Connect icon/hyperlink available on [couhes.mit.edu](https://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, grid, settings) and a top navigation bar with the user name 'Wiklund, Mark' and system icons. The main content area displays summary cards for 'Pending Actions' (5), 'In Progress' (0), and 'Awaiting IRB Response' (5). A task list includes 'Start Exempt Evaluation', 'Create Protocol', and 'Restart Research Request'. Below these are tabs for 'Active Protocols', 'In Progress Protocols', 'All Protocols', 'En-Route Protocols', 'Exempt Evaluations', and 'Restart Research Requests'. A table lists protocols with columns for 'Protocol Number', 'Protocol Status', 'Title', 'Protocol Type', 'Submission Status', 'Submission Type', and 'Approval Date'. The first entry is '2009000291 - Who put the bump in the bump bah bump bah bump?' with a status of 'Active - Open to Enrollment' and a 'View' button.

# 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.



617-2536787

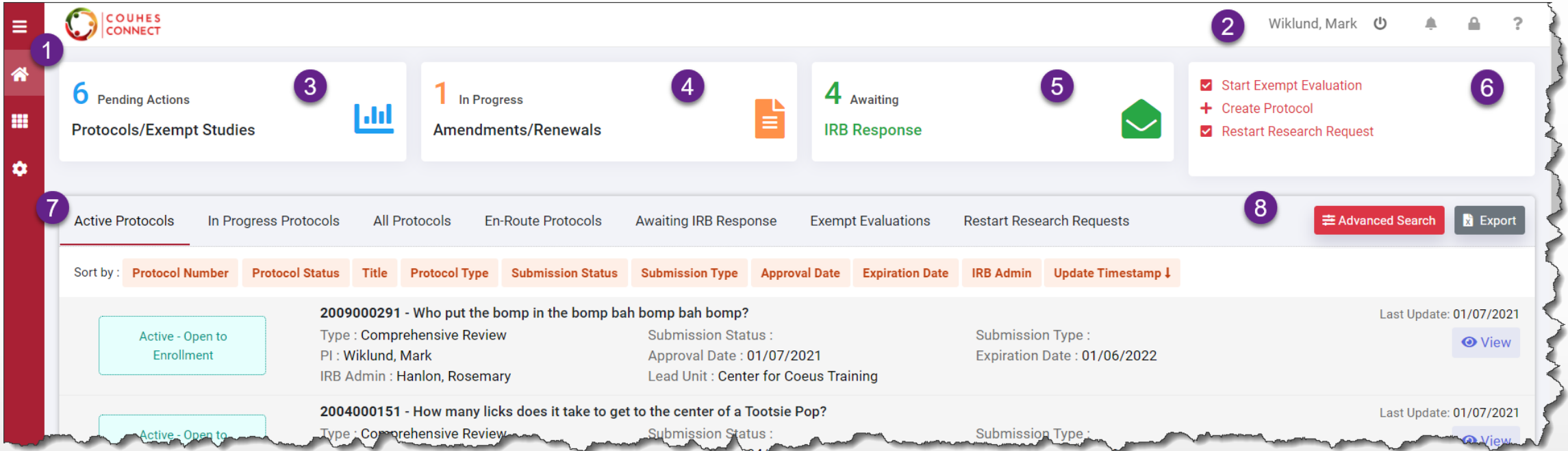


couhes@mit.edu



couhes.mit.edu

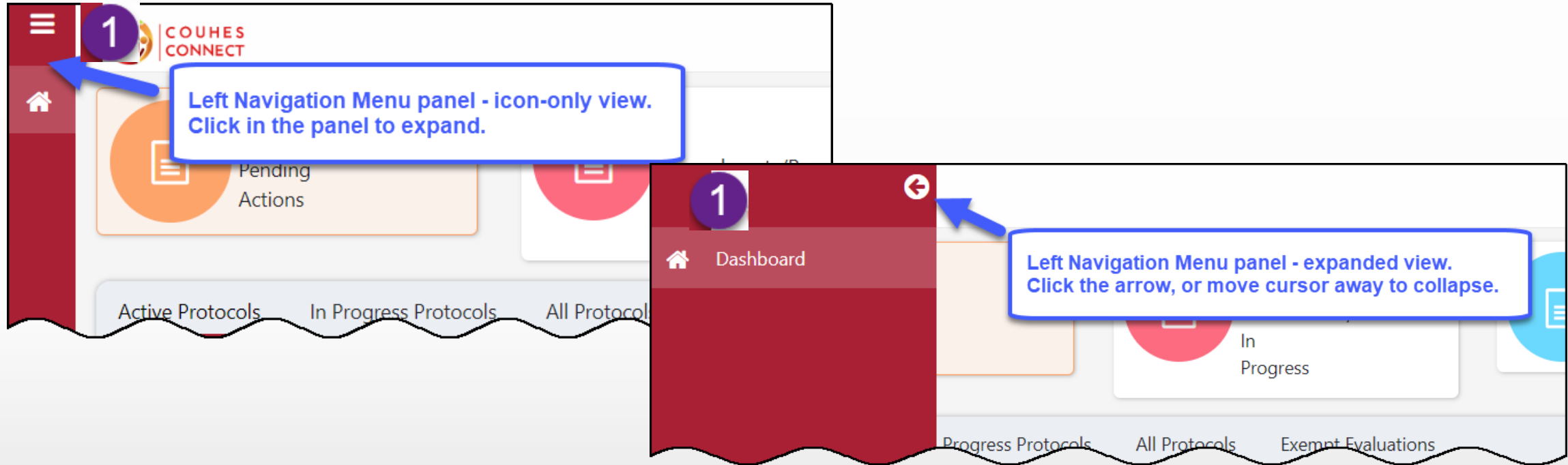
# Dashboard basics...



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 items), 'In Progress Amendments/Renewals' (1 item), 'Awaiting IRB Response' (4 items), and an 'Actions' tile with options like 'Start Exempt Evaluation', 'Create Protocol', and 'Restart Research Request'. A central navigation bar 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). The table lists two protocols, including details like '2009000291 - Who put the bomb in the bomb bah bomb bah bomb?' and '2004000151 - How many licks does it take to get to the center of a Tootsie Pop?'. An 'Advanced Search' button and an 'Export' button are also visible.

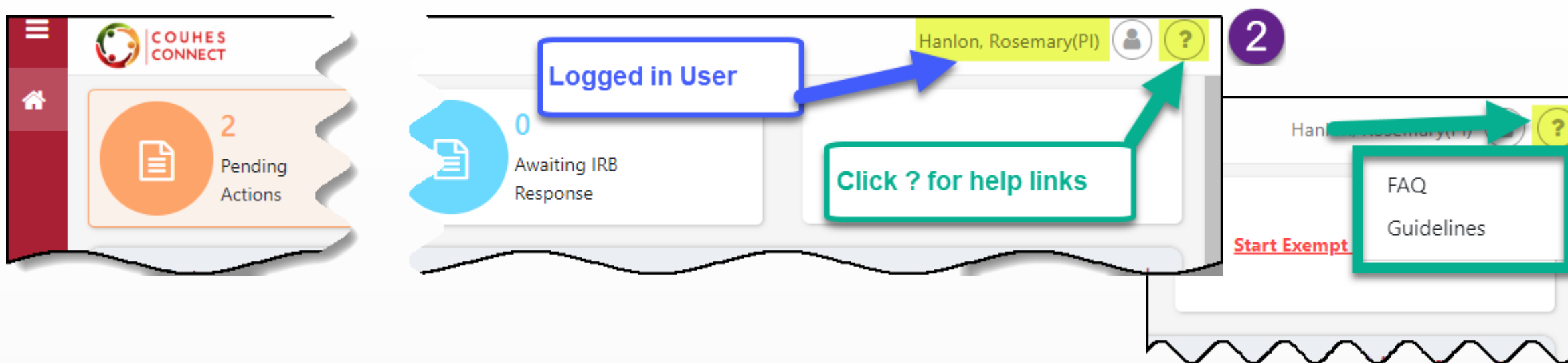
1. Left Navigation/home panel
2. Logged in User ID & Help icon
3. Pending (Protocol) Actions tile
4. Protocol Amendments/Renewals in Progress tile
5. Protocols Awaiting IRB Response tile
6. Actions tile: Exempt, New Protocol, or Restart Research
7. List Views: Click any header to display that list
8.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

# 1. Left Navigation – Home panel



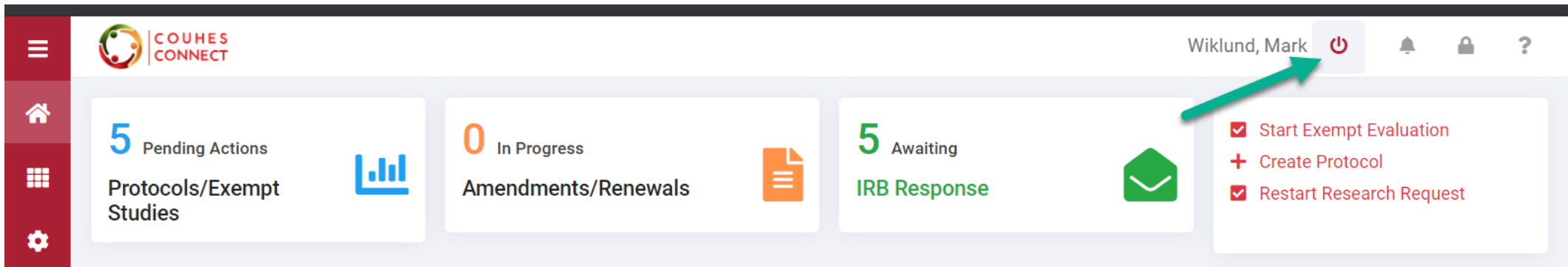
- ❖ The left Navigation Menu panel appears in all Connect screens in compact icon-only view.
- ❖ Click an icon to expand the panel to view the icon labels.
- ❖ Click the 'back arrow' or move your mouse away from the panel to compact the panel.
- ❖ More navigation options will present in later releases.

## 2 a. Logged In User & Help icon



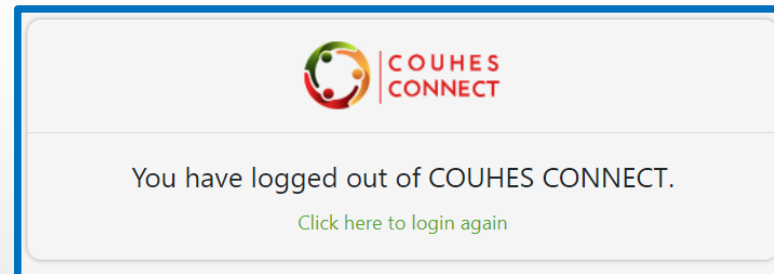
- ❖ Users with Kerberos ID's and MIT Certificates can access COUHES Connect: user name appears in the upper right.
- ❖ Users have access to protocols where they have a Study Role in a protocol, or specific permission.
- ❖ Users with the IRB Department Administrator role can view all protocols in the 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

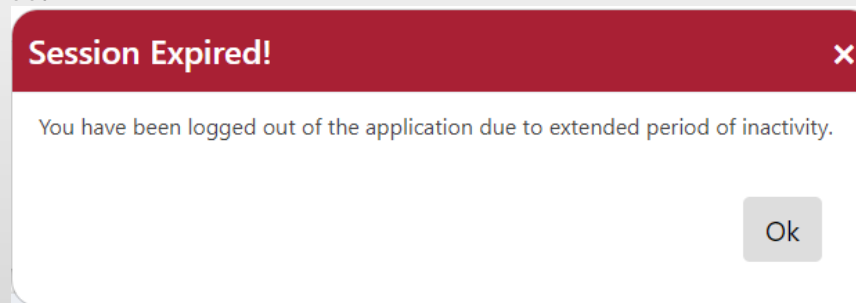


The screenshot shows the COUHES CONNECT dashboard. In the top right corner, the user name 'Wiklund, Mark' is displayed next to a power icon (a red circle with a white power symbol). A green arrow points to this power icon. To the right of the power icon are icons for notifications, a lock, and a help/question mark. A purple circle with the number '2' is overlaid on the top right corner of the dashboard area. The dashboard itself features a red sidebar with navigation icons (home, grid, settings) and three main content cards: '5 Pending Actions Protocols/Exempt Studies', '0 In Progress Amendments/Renewals', and '5 Awaiting IRB Response'. A green envelope icon is visible next to the 'Awaiting IRB Response' card.

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



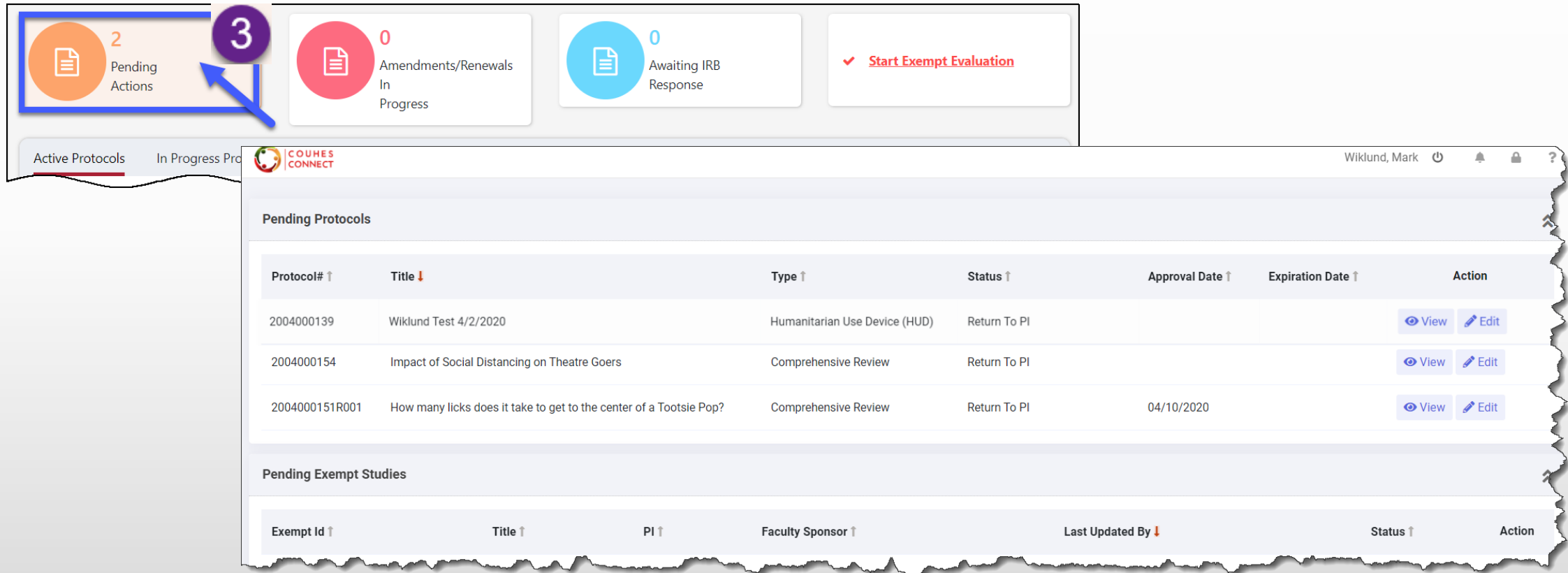
The screenshot shows a confirmation message box with the COUHES CONNECT logo at the top. The text inside the box reads: "You have logged out of COUHES CONNECT." Below this text is a green link that says "Click here to login again".



The screenshot shows a red error message box with the title "Session Expired!". The text inside the box reads: "You have been logged out of the application due to extended period of inactivity." At the bottom right of the box is a grey button labeled "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.



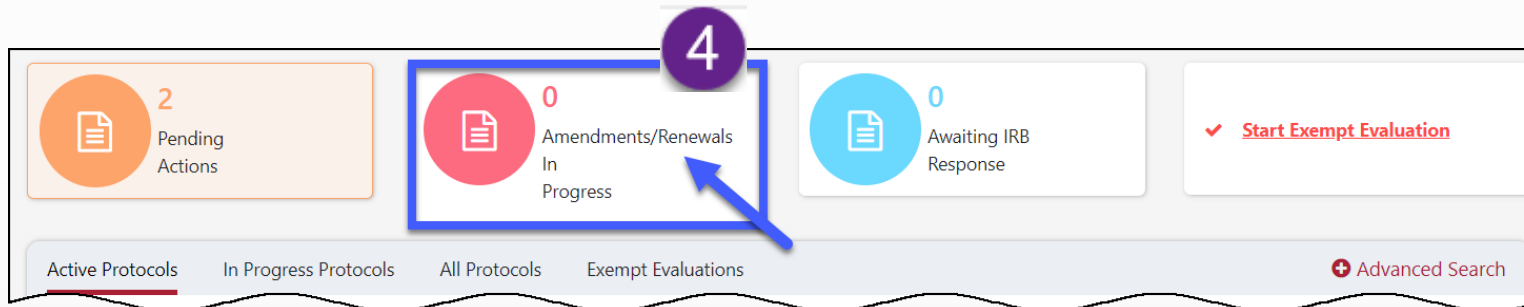
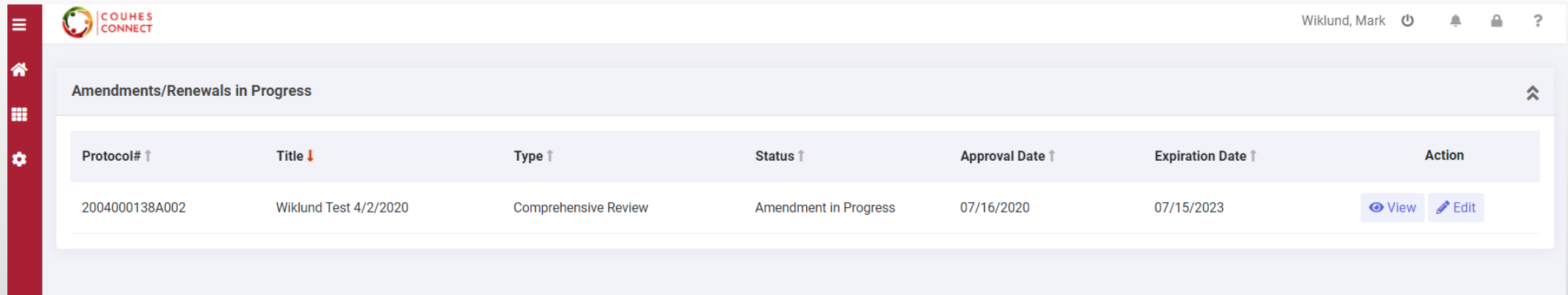
The screenshot shows the COUHES CONNECT dashboard. At the top, there are four tiles: 'Pending Actions' (2 items), 'Amendments/Renewals In Progress' (0 items), 'Awaiting IRB Response' (0 items), and a 'Start Exempt Evaluation' button. Below these is a navigation bar with 'Active Protocols' and 'In Progress 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			<a href="#">View</a> <a href="#">Edit</a>
2004000154	Impact of Social Distancing on Theatre Goers	Comprehensive Review	Return To PI			<a href="#">View</a> <a href="#">Edit</a>
2004000151R001	How many licks does it take to get to the center of a Tootsie Pop?	Comprehensive Review	Return To PI	04/10/2020		<a href="#">View</a> <a href="#">Edit</a>

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.

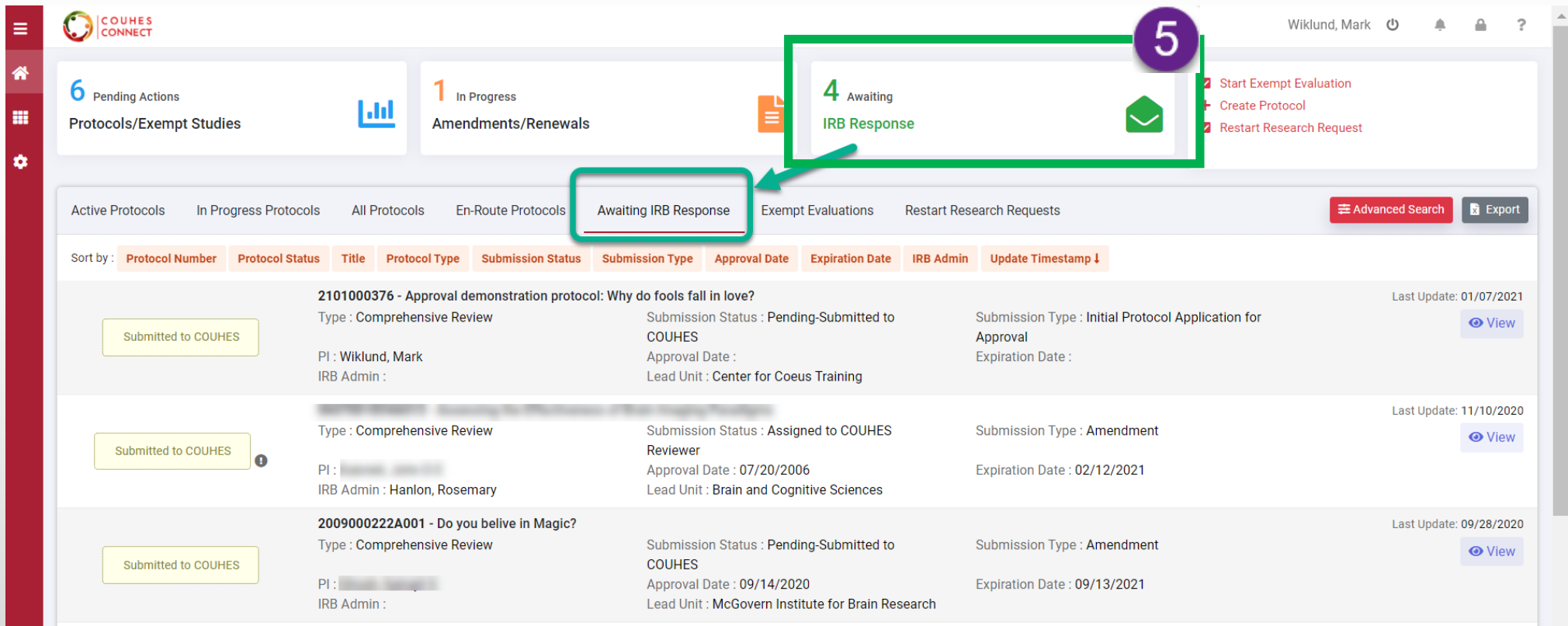



Protocol# ↑	Title ↓	Type ↑	Status ↑	Approval Date ↑	Expiration Date ↑	Action
2004000138A002	Wiklund Test 4/2/2020	Comprehensive Review	Amendment in Progress	07/16/2020	07/15/2023	<a href="#">View</a> <a href="#">Edit</a>



# 5. Awaiting IRB Response tile

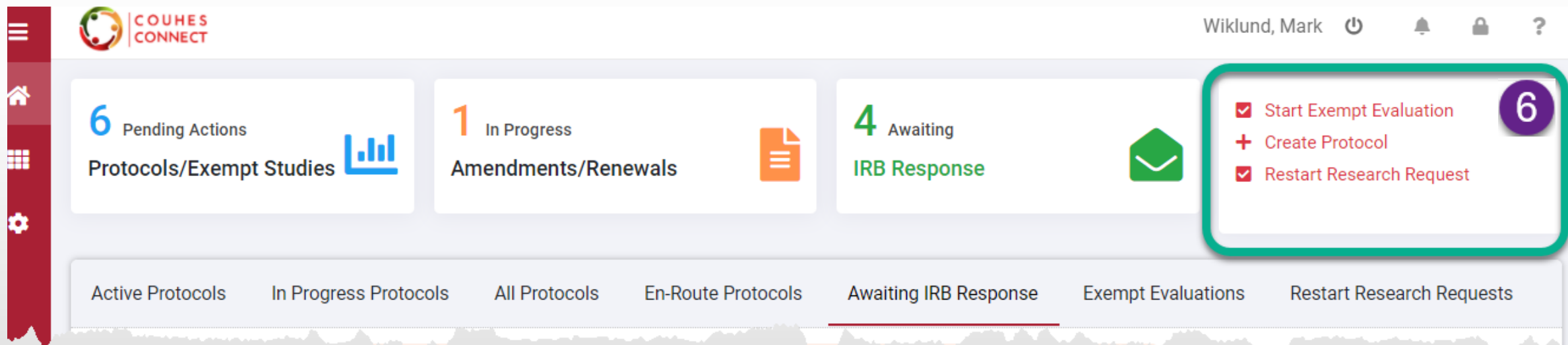
- ❖ Click the **Awaiting IRB Response** tile to insert a list of protocols undergoing COUHES review.
- ❖ Click the [**View**] button in the Action column to open an item in view mode.
- ❖ Click the **Home** icon on the left navigation panel to return to your dashboard at any time.



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 these 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 of protocols with columns for 'Protocol Number', 'Protocol Status', 'Title', 'Protocol Type', 'Submission Status', 'Submission Type', 'Approval Date', 'Expiration Date', 'IRB Admin', and 'Update Timestamp'. Three protocol entries are visible, each with a 'Submitted to COUHES' status and a 'View' button.

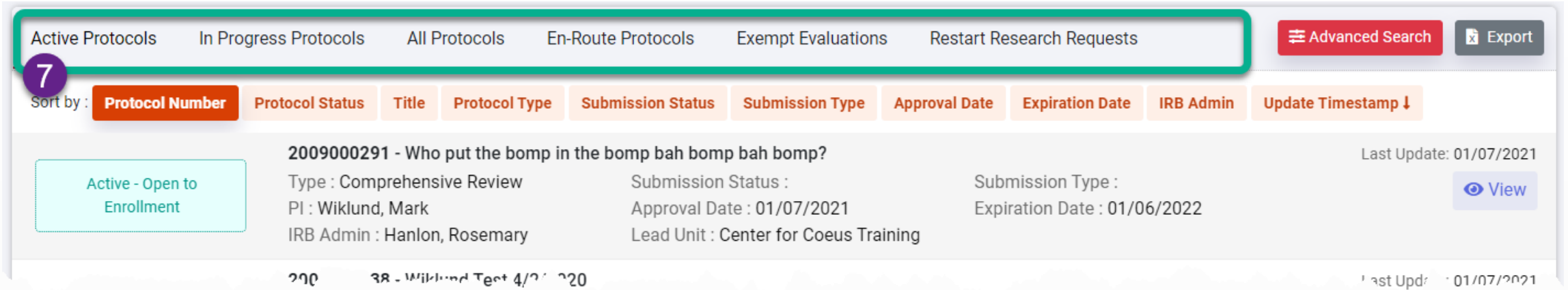
## 6. Action tile

- ❖ 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', '1 In Progress Amendments/Renewals', and '4 Awaiting IRB Response'. A red-bordered box highlights the '6 Pending Actions' tile, which contains a list of actions: 'Start Exempt Evaluation', 'Create Protocol', and 'Restart Research Request'. Below the tiles is a navigation bar with tabs for 'Active Protocols', 'In Progress Protocols', 'All Protocols', 'En-Route Protocols', 'Awaiting IRB Response' (which is currently selected), 'Exempt Evaluations', and 'Restart Research Requests'. A left-hand navigation panel is partially visible on the far left.

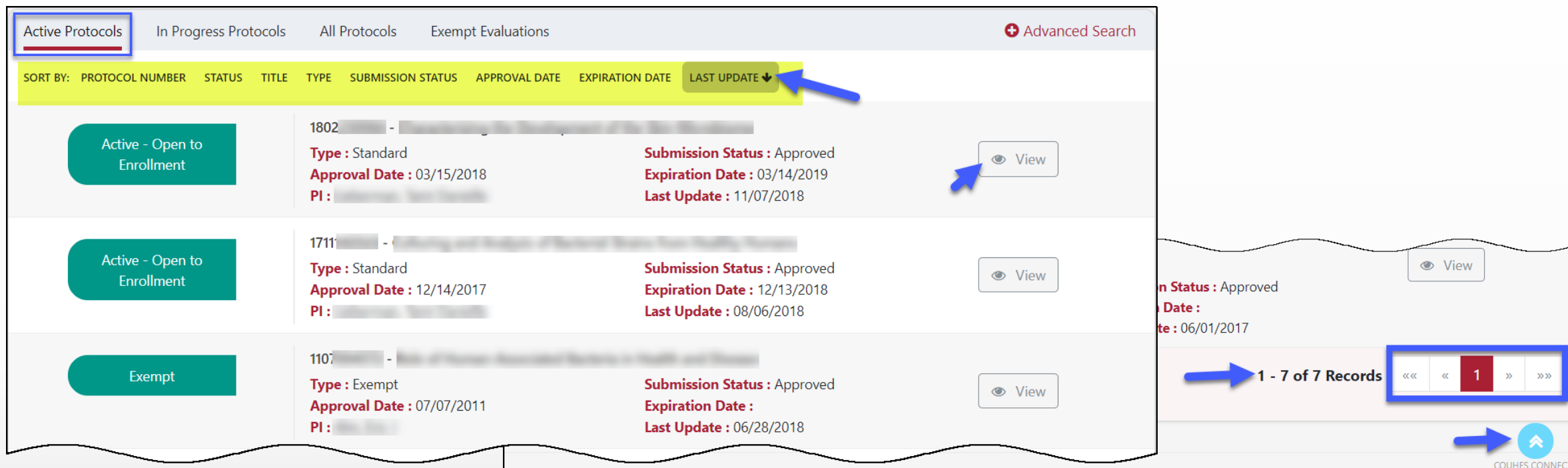
# 7. List Views of Protocols and Exempt Studies



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 ↓

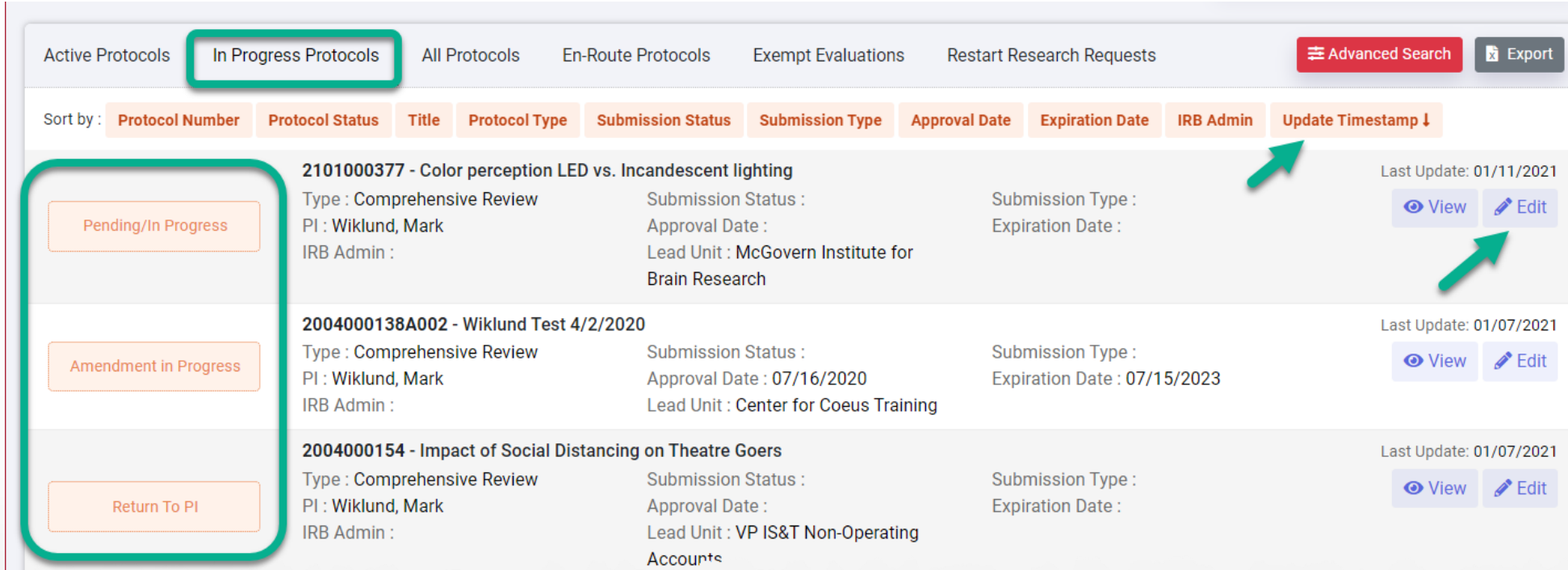
Active - Open to Enrollment	1802 - [REDACTED]	Type : Standard Approval Date : 03/15/2018 PI : [REDACTED]	Submission Status : Approved Expiration Date : 03/14/2019 Last Update : 11/07/2018	<a href="#">View</a>
Active - Open to Enrollment	1711 - [REDACTED]	Type : Standard Approval Date : 12/14/2017 PI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

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



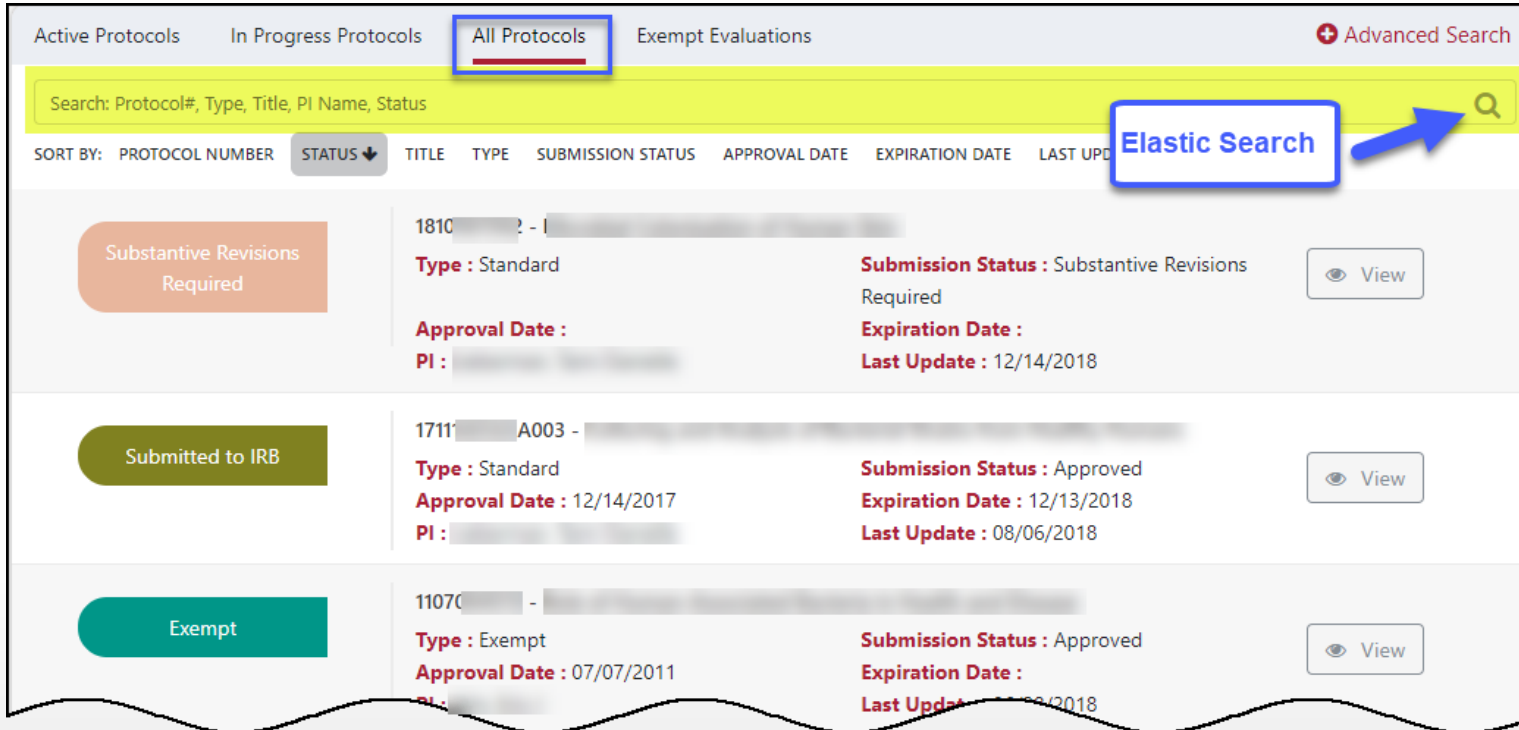
Active Protocols **In Progress Protocols** All Protocols En-Route Protocols Exempt Evaluations Restart Research Requests [Advanced Search](#) [Export](#)

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

Protocol Number	Protocol Status	Title	Protocol Type	Submission Status	Submission Type	Approval Date	Expiration Date	IRB Admin	Update Timestamp
2101000377	Pending/In Progress	Color perception LED vs. Incandescent lighting	Comprehensive Review						01/11/2021
2004000138A002	Amendment in Progress	Wiklund Test 4/2/2020	Comprehensive Review			07/16/2020	07/15/2023		01/07/2021
2004000154	Return To PI	Impact of Social Distancing on Theatre Goers	Comprehensive Review						01/07/2021

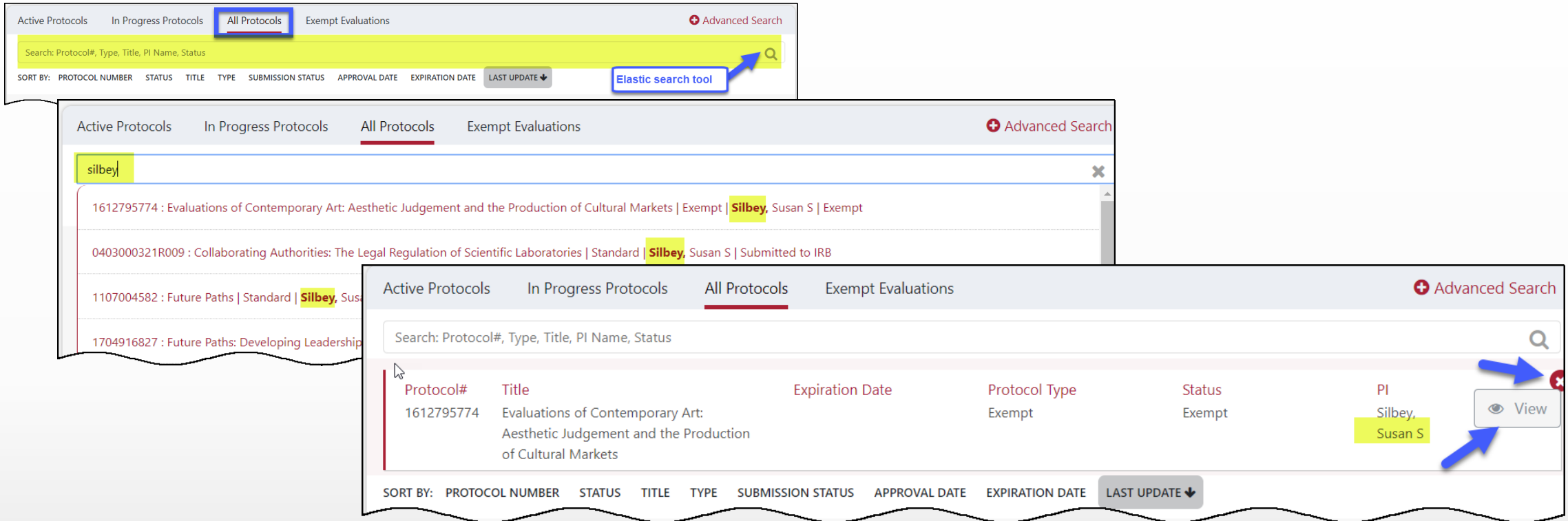
- ❖ **In Progress Protocols:** protocols that are in a status where they can be edited and submitted for review.
  - ❖ Note that In Progress includes all editable status protocols – new, amendments, renewals, returned, etc.
- ❖ Click the [**Edit**] button to open the protocol in edit mode to make your 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



The screenshot shows the 'All Protocols' view in the COUHES CONNECT system. At the top, there are navigation tabs: 'Active Protocols', 'In Progress Protocols', 'All Protocols' (selected), and 'Exempt Evaluations'. A search bar is located below the tabs, containing the text 'Search: Protocol#, Type, Title, PI Name, Status'. A blue box labeled 'Elastic search tool' points to the search bar. Below the search bar, there are sorting options: 'SORT BY: PROTOCOL NUMBER STATUS TITLE TYPE SUBMISSION STATUS APPROVAL DATE EXPIRATION DATE LAST UPDATE'. The search results are displayed as a list of protocols. The first result is highlighted in yellow and shows the protocol number '1612795774', the title 'Evaluations of Contemporary Art: Aesthetic Judgement and the Production of Cultural Markets', the status 'Exempt', the protocol type 'Exempt', and the PI name 'Silbey, Susan S'. A blue box labeled 'View' points to the 'View' button next to this result. The search bar also shows the text 'silbey' entered.

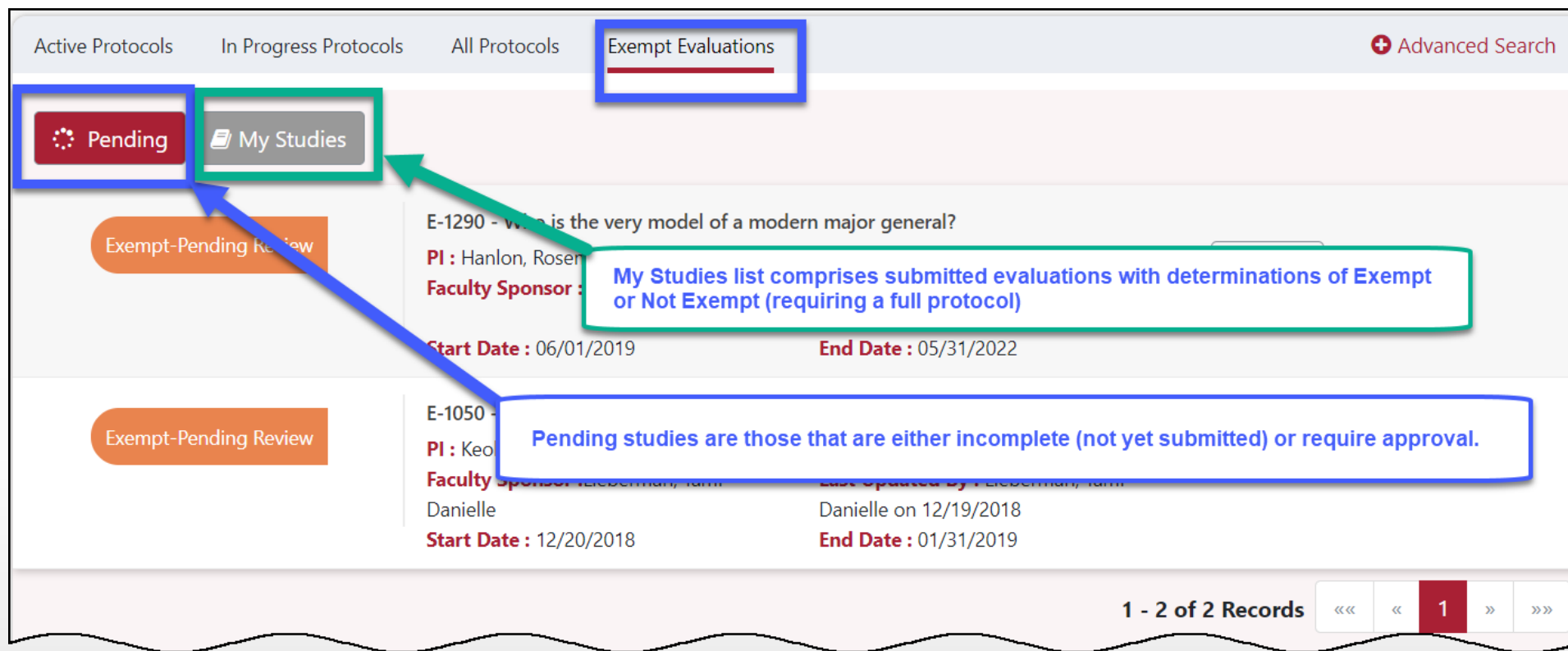
Protocol#	Title	Expiration Date	Protocol Type	Status	PI
1612795774	Evaluations of Contemporary Art: Aesthetic Judgement and the Production of Cultural Markets		Exempt	Exempt	Silbey, Susan S
0403000321R009	Collaborating Authorities: The Legal Regulation of Scientific Laboratories		Standard	Submitted to IRB	Silbey, Susan S
1107004582	Future Paths		Standard		Silbey, Susan S
1704916827	Future Paths: Developing Leadership				

- ❖ 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

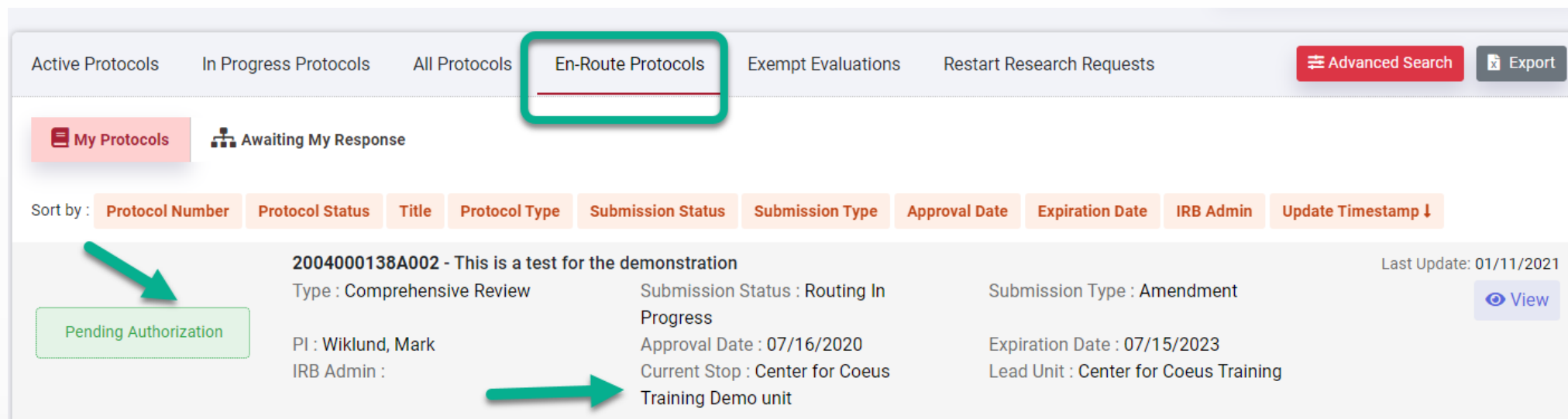


The screenshot shows the 'Exempt Evaluations' section of the dashboard. At the top, there are tabs for 'Active Protocols', 'In Progress Protocols', 'All Protocols', and 'Exempt Evaluations'. Below these are two filter buttons: 'Pending' (highlighted with a blue box) and 'My Studies' (highlighted with a green box). A blue arrow points from the 'Pending' button to a callout box stating: 'Pending studies are those that are either incomplete (not yet submitted) or require approval.' A green arrow points from the 'My Studies' button to a callout box stating: 'My Studies list comprises submitted evaluations with determinations of Exempt or Not Exempt (requiring a full protocol)'. The main content area displays two evaluation records, each with a 'Start Date' and 'End Date'. At the bottom right, there is a pagination control showing '1 - 2 of 2 Records' and navigation arrows.

- ❖ **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 ↓](#)

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

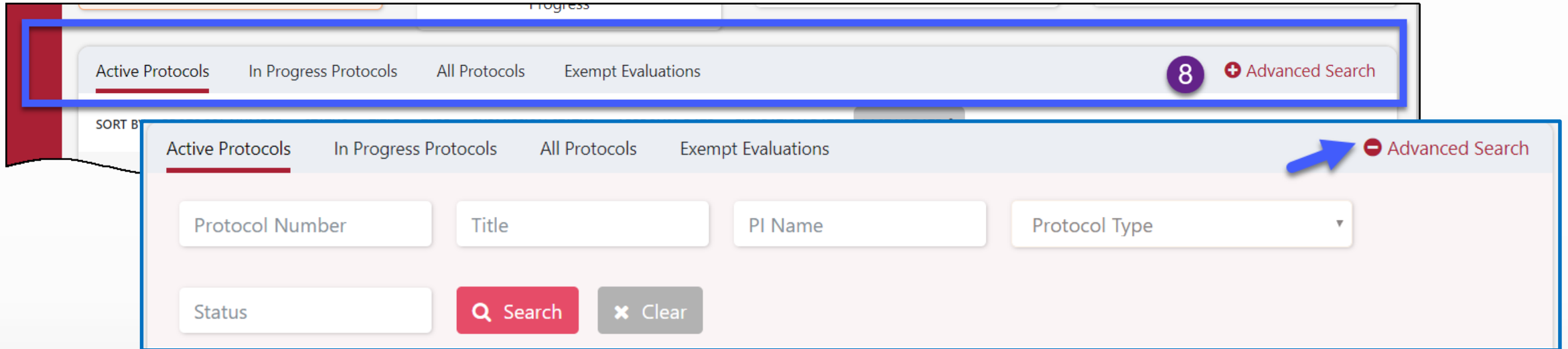
Type : Comprehensive Review   Submission Status : Routing In Progress   Submission Type : Amendment   [View](#)

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](mailto:couhes@mit.edu)



617-2536787



[couhes@mit.edu](mailto:couhes@mit.edu)



[couhes.mit.edu](http://couhes.mit.edu)

- Questions regarding Connect navigation, general functionality, or feedback on documentation, please contact [ra-help@mit.edu](mailto:ra-help@mit.edu)
- For Department IRB Administrator role assignment, please contact your Department's Primary Financial Officer.
- For difficulties with MIT Certificates, please contact [servicedesk@mit.edu](mailto:servicedesk@mit.edu)