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## How To Run a Report of All Studies You Are Listed on As Primary Investigator or Key Personnel

- Step 1. On your dashboard, choose the IRB tab
- Step 2. Click Reports
- Step 3. Choose the Custom Reports tab
- Step 4. Click Protocols by Investigator

V9 DEV							Hello	, John Smith 🕶
»	Dashboard	Agreements	COI	Facilities	Grants	IACUC	IRB	
Submi	ssions Mee	tings Reports	Library Help C	enter			1	
		2						
Reports			3					
		Standard Reports	Custom Reports					
		Custom Search						
		Filter by 😧 Name	Enter text to s	search for	Q + Add Filter × Clear All			
		Name		Result Type	Descriptio	on		
		Central Vermont Medi	cal Center Report	IRB Submis	sion Show all s	submissions with CVMC loo	cations	
		Protocols by Departme	ent	IRB Submis	sion Report of	studies by department		
	4	Protocols By Investiga	itor	IRB Submis	sion			
		3 items		∢ pag	e 1 of 1 ▶		10	/ page

**Step 5**. Once you click Protocols by Investigator (Step 4) a pop-up window will appear on which you must click the "Actions" menu and Select "Change Parameters".

Protocols By Investigator	Help
Filter by       Protocol ID       Enter text to search         Q       + Add Filter       Clear All         Protocol ID PI (First) PI (Last) Status Department Protocol Short Title Protocol Coordin	Actions • 🔅

Step 6: On the "Change Parameters" Pop-Out window, click on the three dots as seen below and select your name. Then hit "OK" at the bottom of the pop-up window. This will show all the studies where you are listed as PI.

Edit Parameters For Search							
Field	Comparator	Value					
Project State	!=	Pre-Submission					
Study Team Members.studyTeamMember	=	System Administrator					
Investigator.studyTeamMember	=	System Administrator	-				
Submission Type	=	Initial Study					
Submission Type	=	IRB Site					

**Step 7.** You will now be able to export a list of studies you are associated with by clicking on the "Actions" Button and selecting "Export to CSV".

Filter by 🔞	Protocol ID  Enter text to search				Actions		•	
🗙 Clear All							Change Parameters	
Protocol ID	PI (First)	PI (Last)	Status	Department	Protocol Short Title	Protoc Coordi	Export to CSV	
STUDY0000270	2	-	Pre- Review	Affiliated - General	Exempt 4 with faculty sponsor			Q
STUDY0000270	7	-	Discarded		test			Q

To search for studies in which you are Key Personnel, follow Step 6 and 7 as above except edit the "Study Team Members" field.

Edit Parameters For Search								
Field	Comparator	Value						
Project State	!=	Pre-Submission						
Study Team Members.studyTeamMembe	r =	System Administrator						
Investigator.studyTeamMember	=	System Administrator						
Submission Type	=	Initial Study						
Submission Type	=	IRB Site	•••					

This report can not be run by the proxy or contact. For accurate results to generate the person logged into the Click system will only be allowed to see protocols they are listed as study team members or as the PI.

This is helpful to run if you are leaving the institution and need to close protocols or remove yourself from the study team list. This may also be useful when key personnel are moving departments and need to revise research roles on protocols.

**Step 7.** An Excel file of the exported CSV will automatically download.