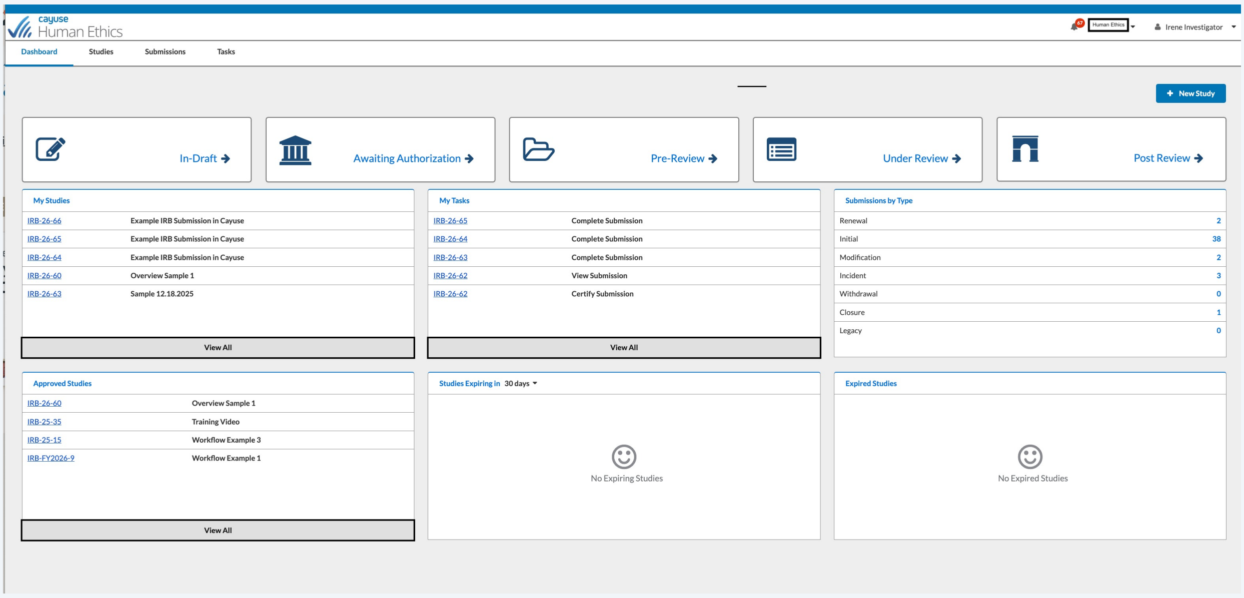
How to Submit an Initial Application on Cayuse

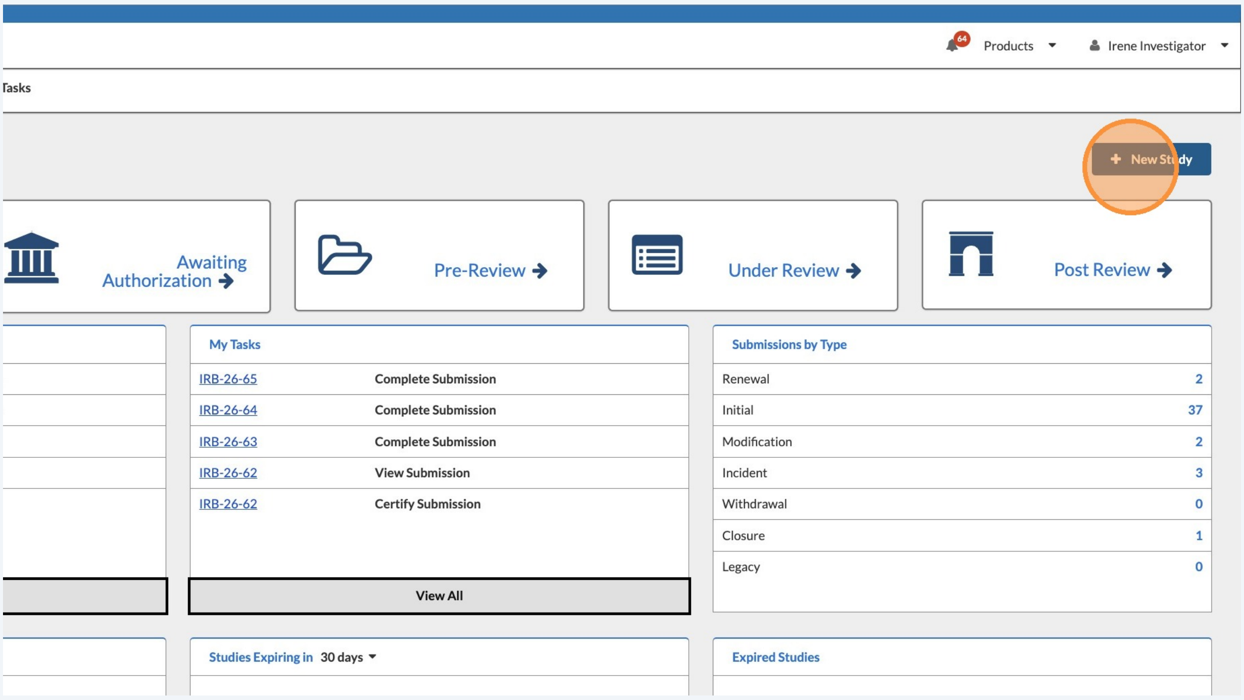
Scribe

This guide provides a step-by-step process for submitting an initial application in Cayuse, ensuring that users understand each requirement and avoid common pitfalls. By following the outlined steps, researchers can efficiently navigate the application, ensuring all necessary information is included for a successful submission.

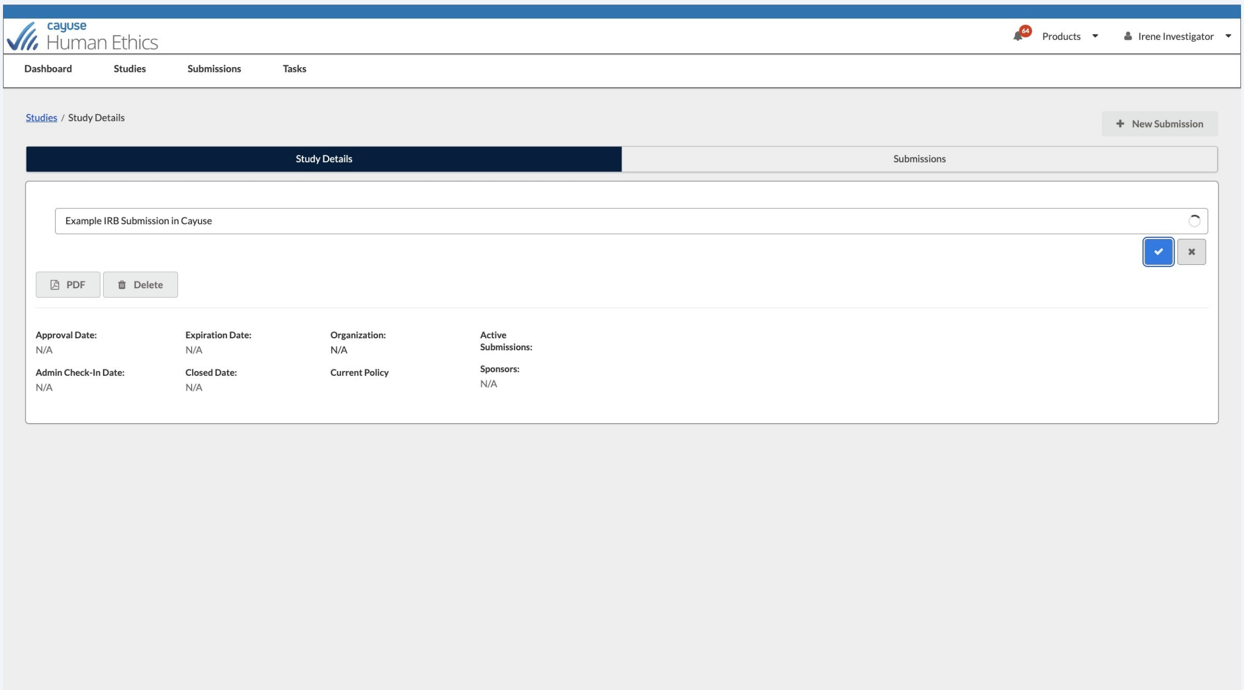
1 Navigate to your Cayuse home dashboard using the following link! https://usm.app.cayuse.com/



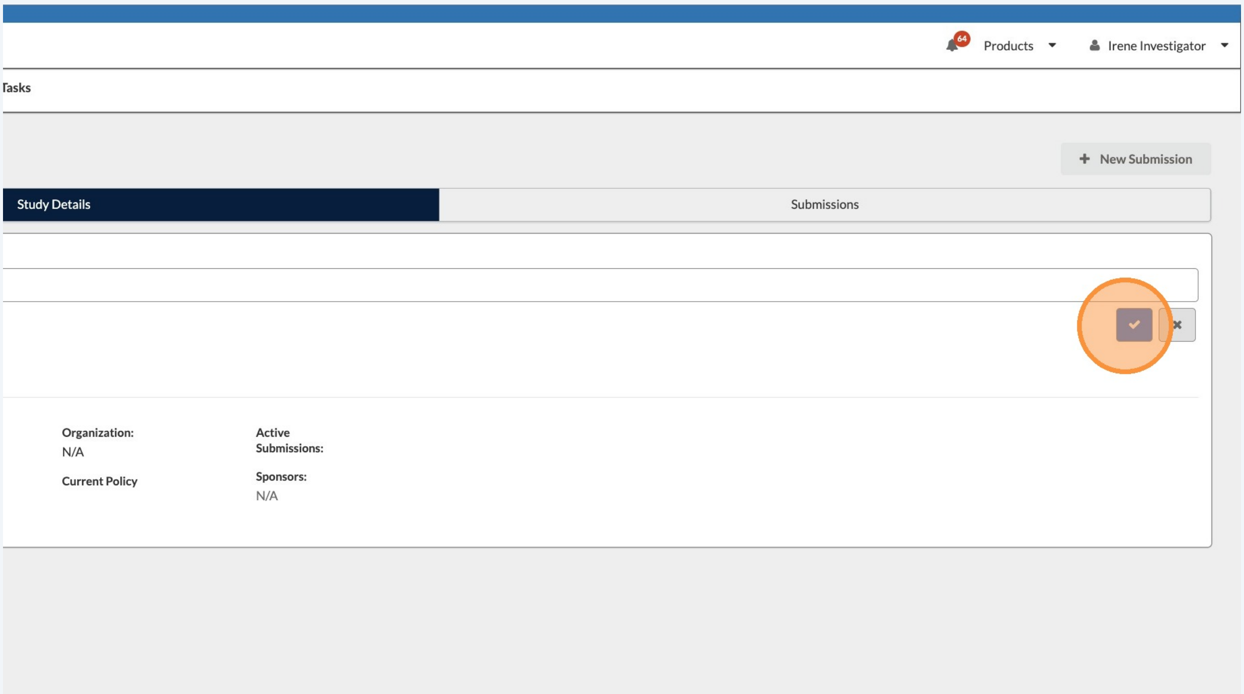
2 Click **"New Study"**



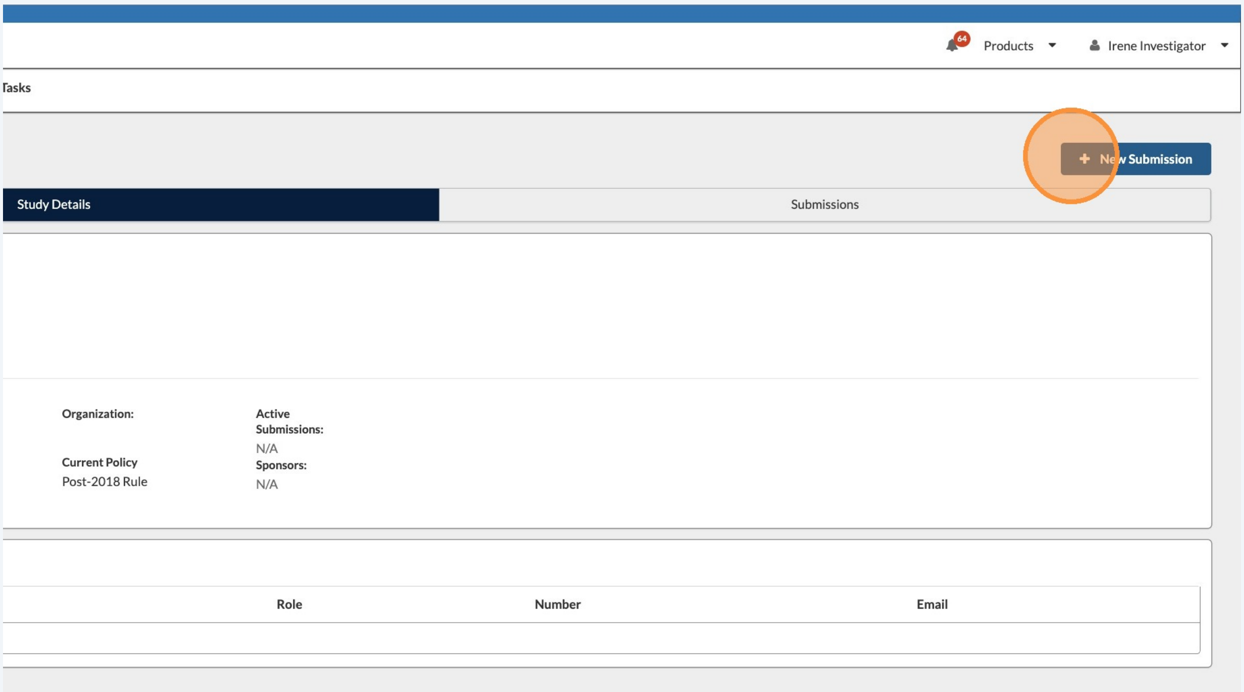
3 **Enter your study's title** in the text box provided.



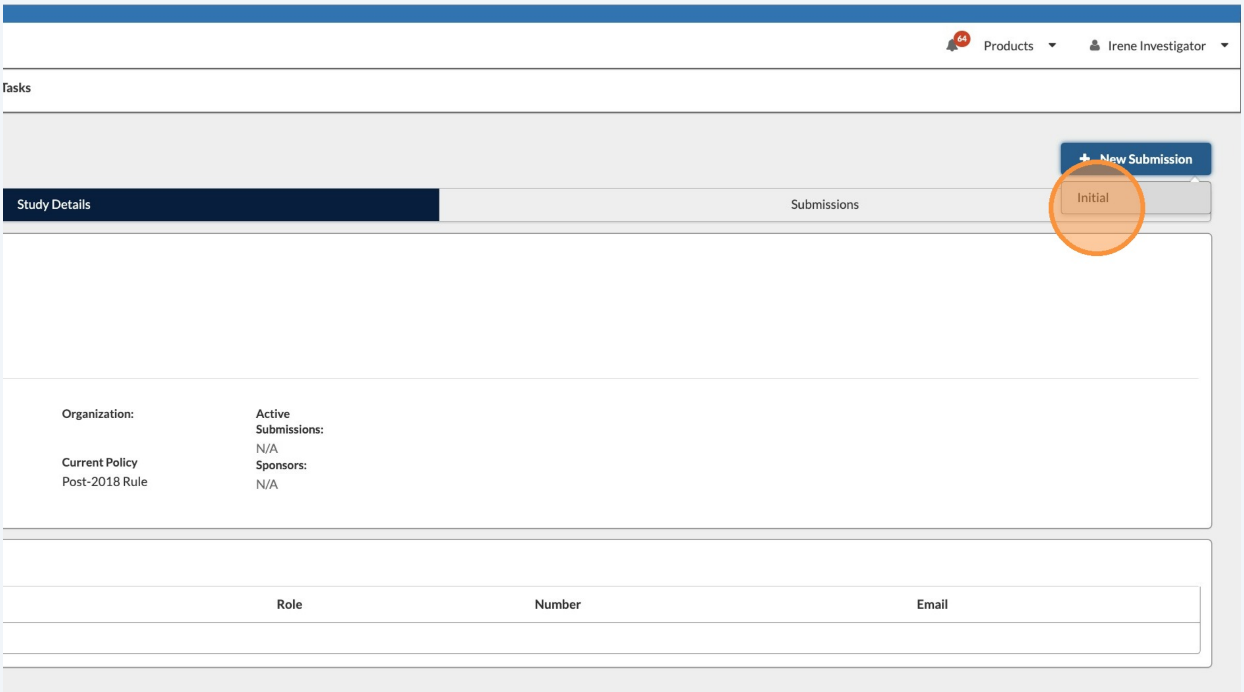
4 Click **"Confirm"**



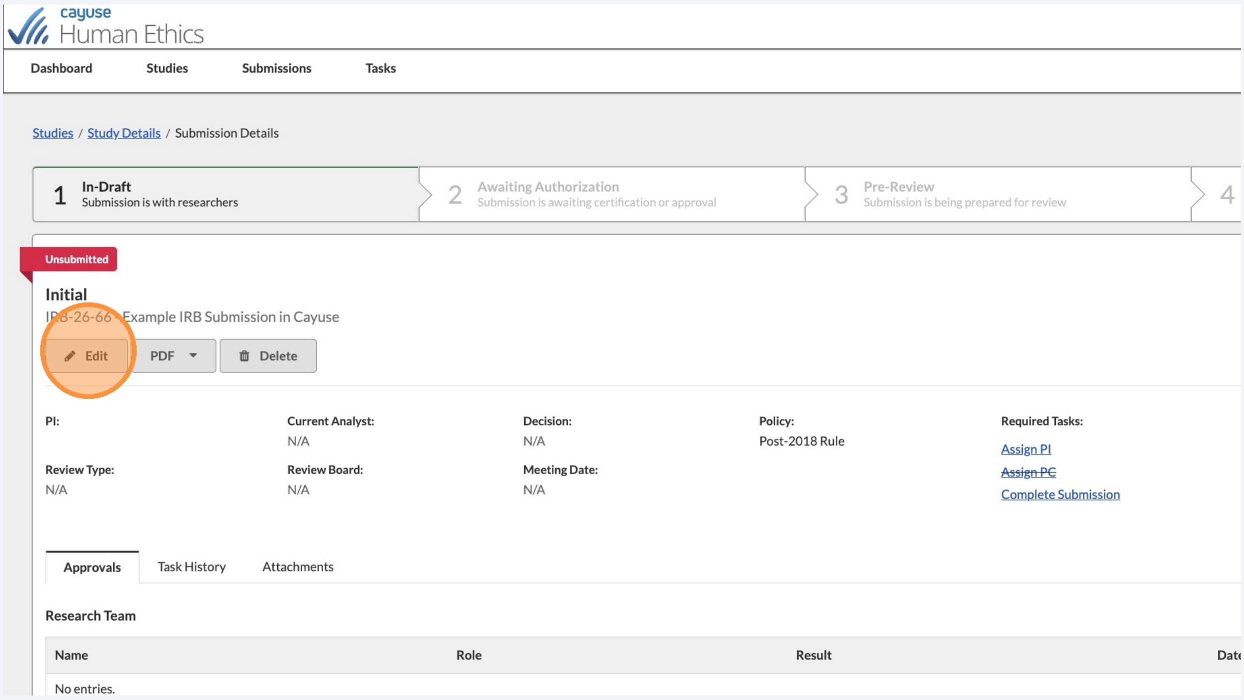
5 Navigate to the top right hand corner and click "**New Submission".**



6 Click **"Initial"**



7 Click **"Edit"** to begin editing your initial application.

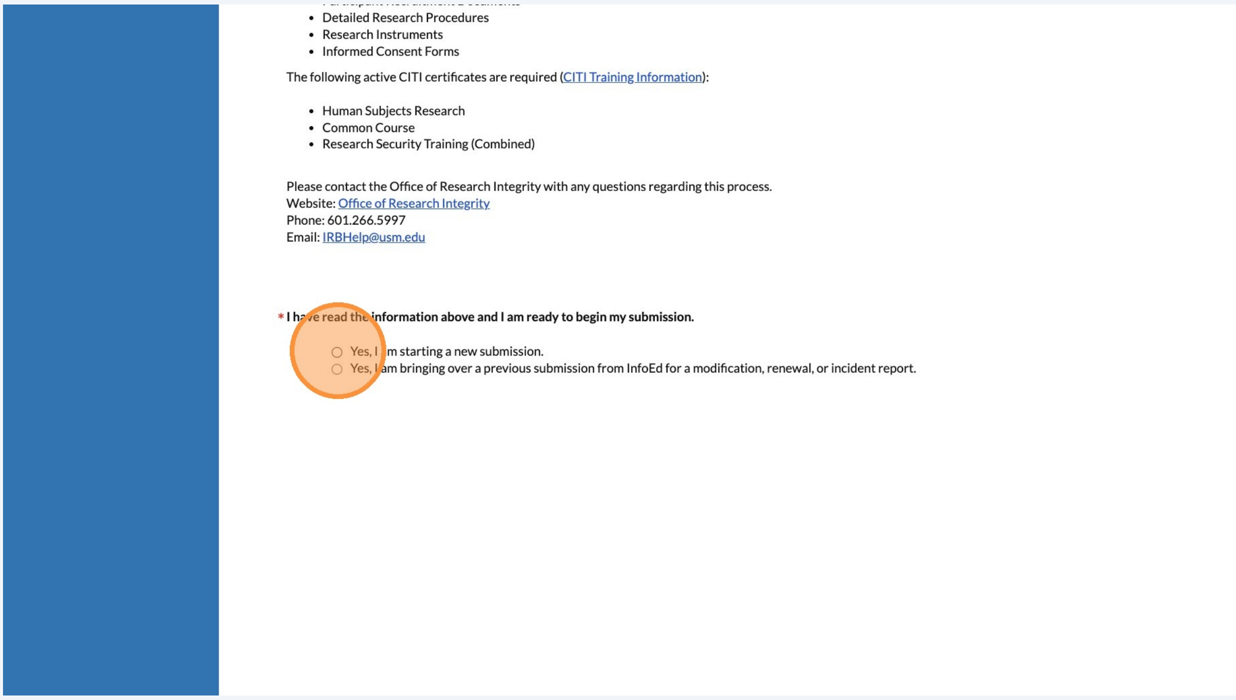


8

You have now reached the first page - Getting Started.

Read the information on this page in entirety.

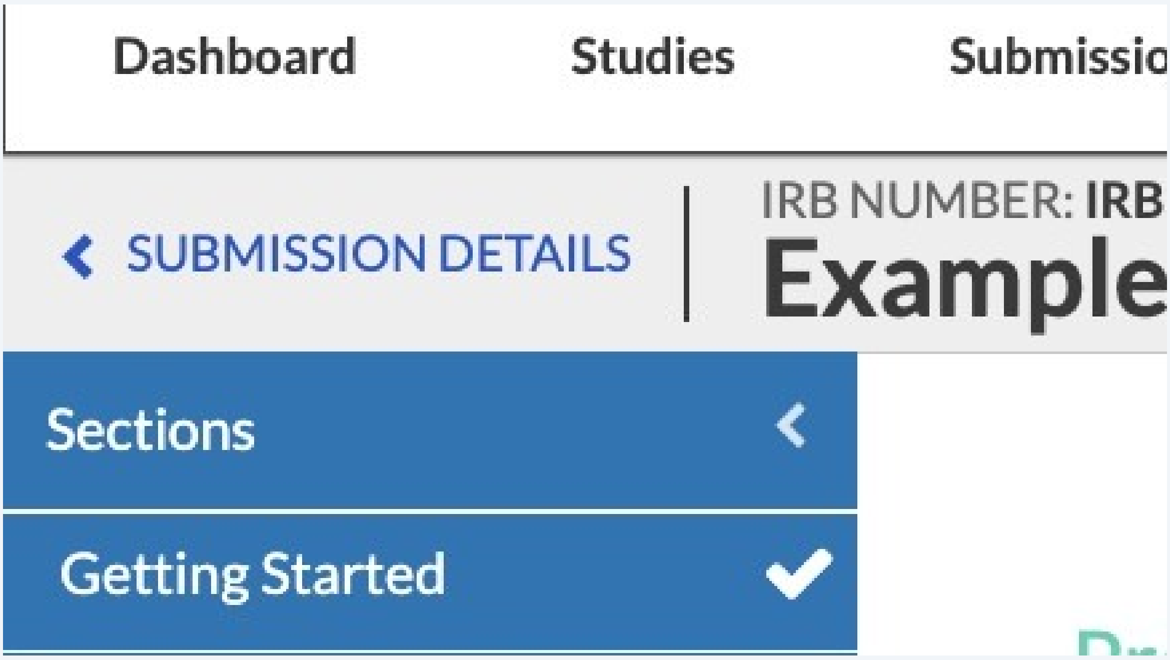
Once finished, select the **"Yes, I am starting a new submission."** field.



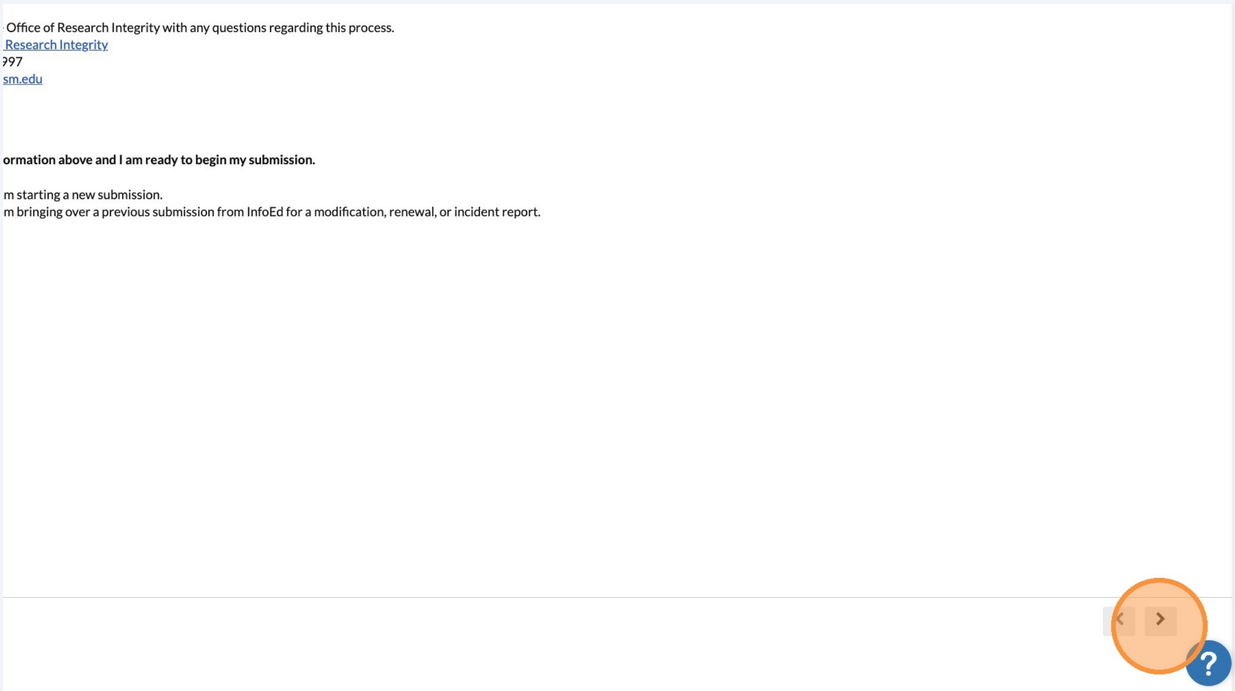
9 Once you answer this question, you will notice that the "Getting Started" page now has a checkmark beside it.

Throughout the application, a checkmark will populate beside each page's tab IF you answer each of the required questions on each page,

Note: You can *NOT* officially submit a protocol if there is not a checkmark beside each tab on your application.

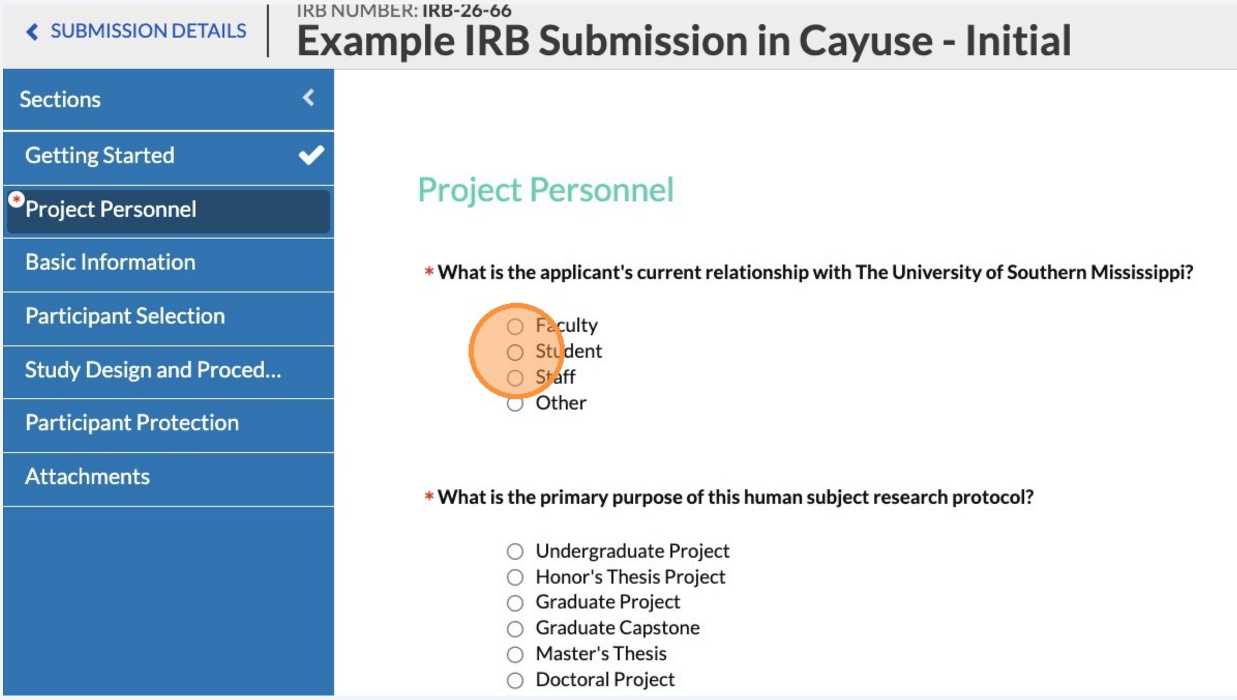


10 **Click here** to continue to the next page.

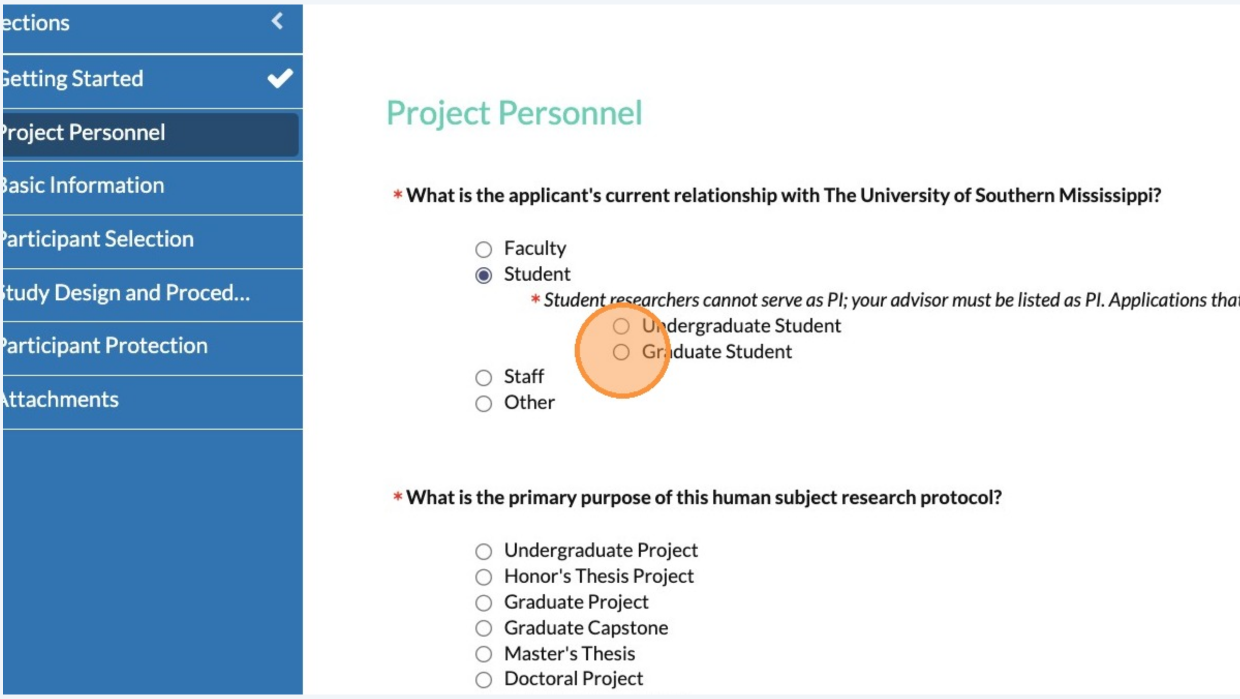


11 **You have now reached the "Project Personnel" page.**

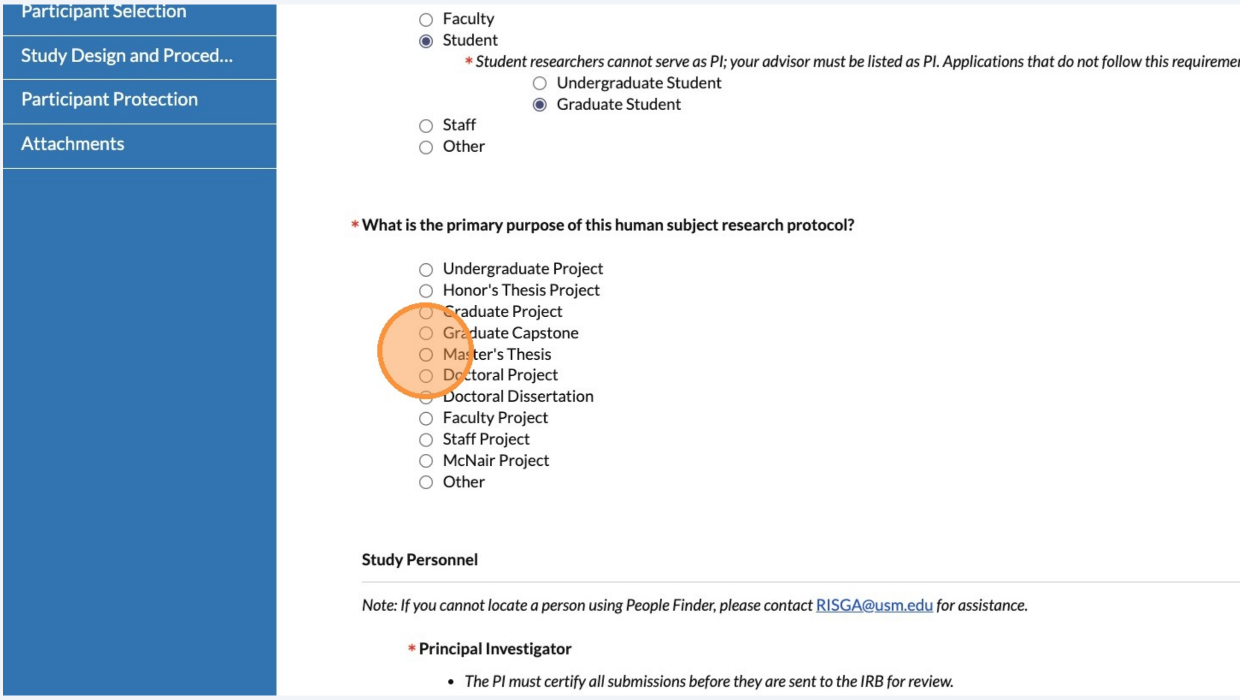
In the first question, you will be asked to **indicate** your current relationship with The University of Southern Mississippi.



12 Based on the item you select, a dropdown menu may appear to prompt you to continue indicating your specific relationship to the university.



13 Next, **select** the purpose of your protocol.

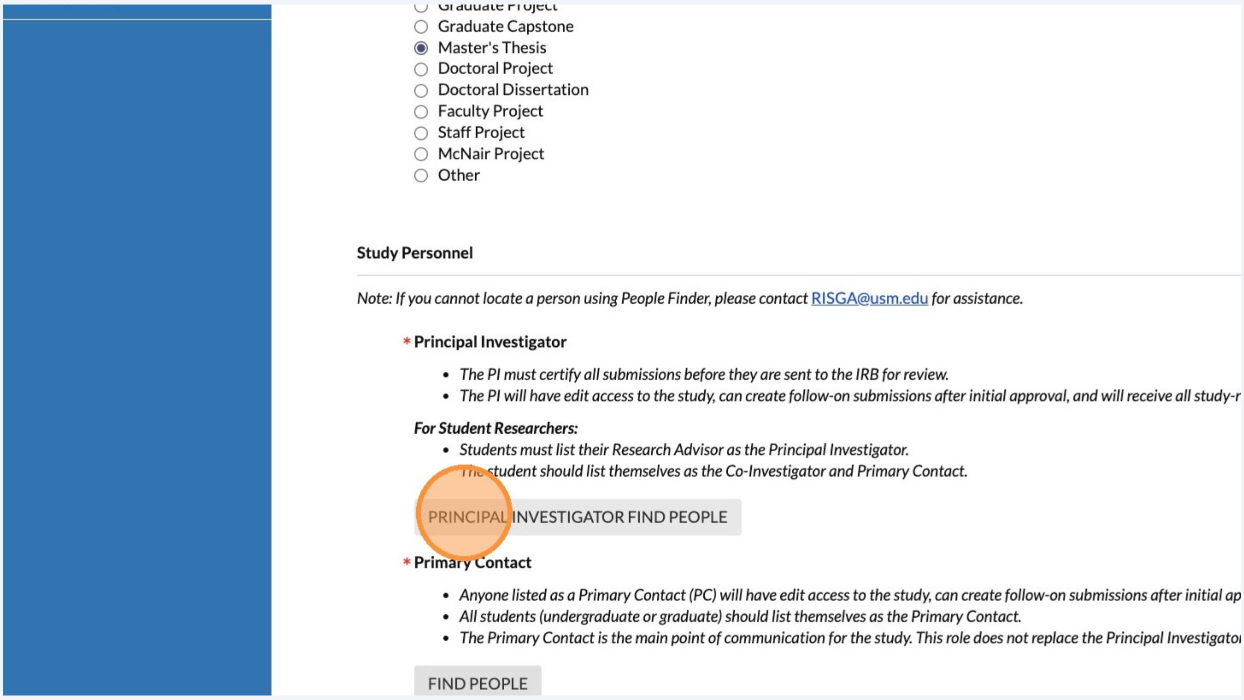


14 Following this, navigate to the "Study Personnel" section.

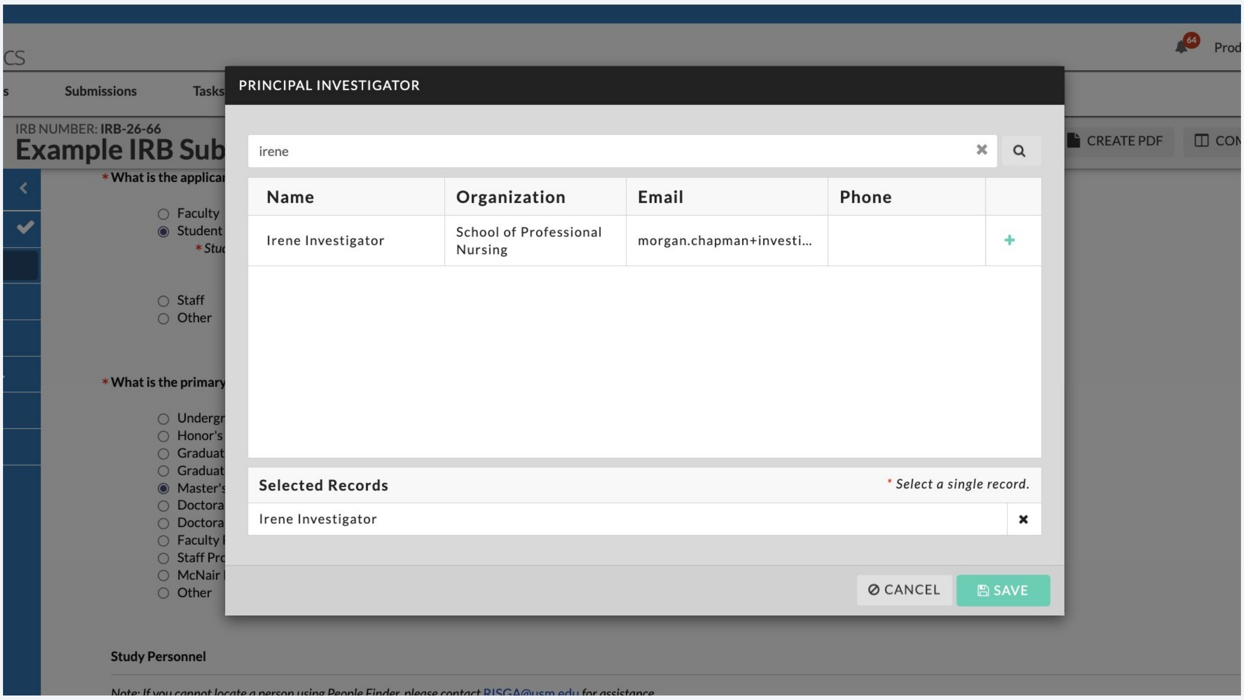
In this section, you will be asked to select a PI.

Click **"Principle Investigator Find People"** to select a PI.

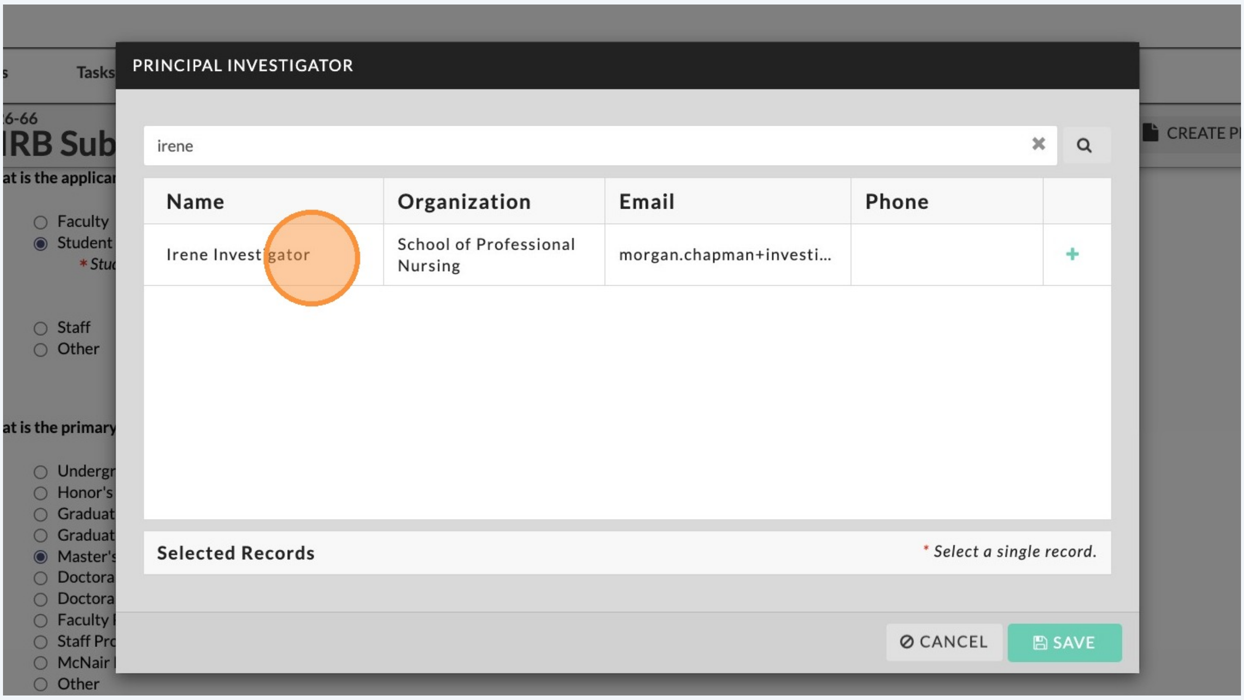
Remember: *Student researchers cannot serve as PI; your advisor must be listed as PI*



15 **Locate** your advisor using the search bar.

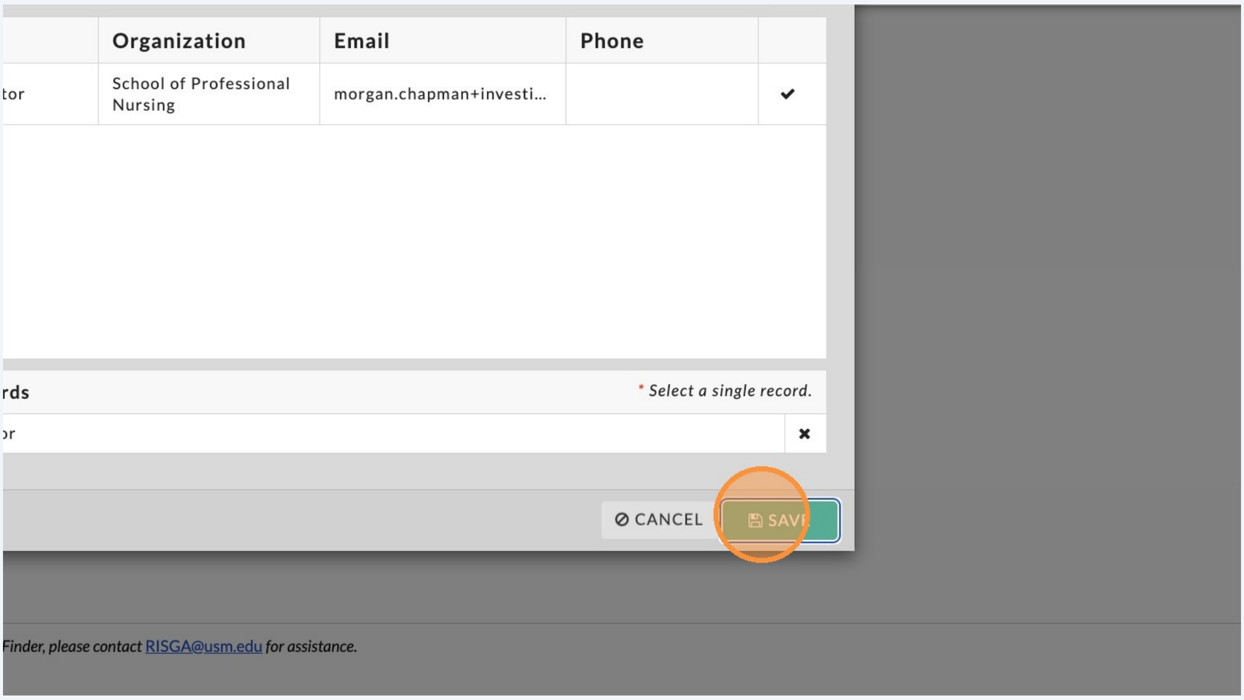


16 Once the appropriate party is located, **click their name** on the dropdown menu.

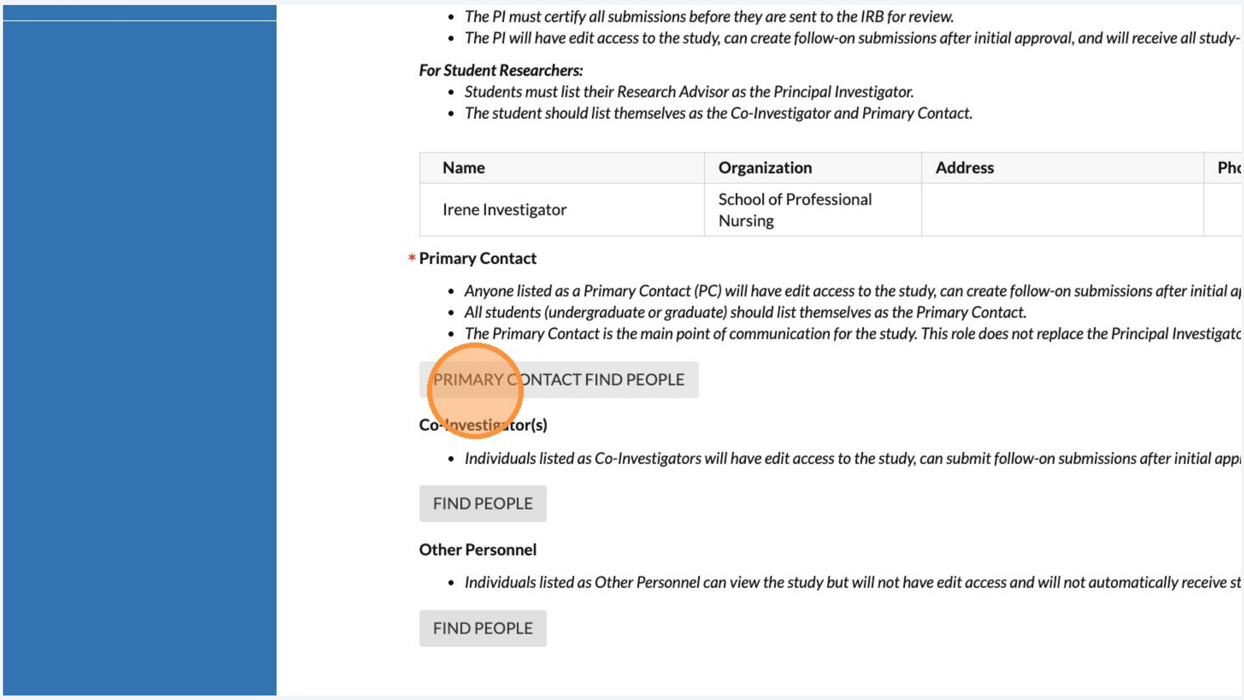


17 Press **"Save".**

Note: If a name does NOT appear on your protocol, search for the individual again, SELECT their name and press save until you see the name reflected on your protocol.

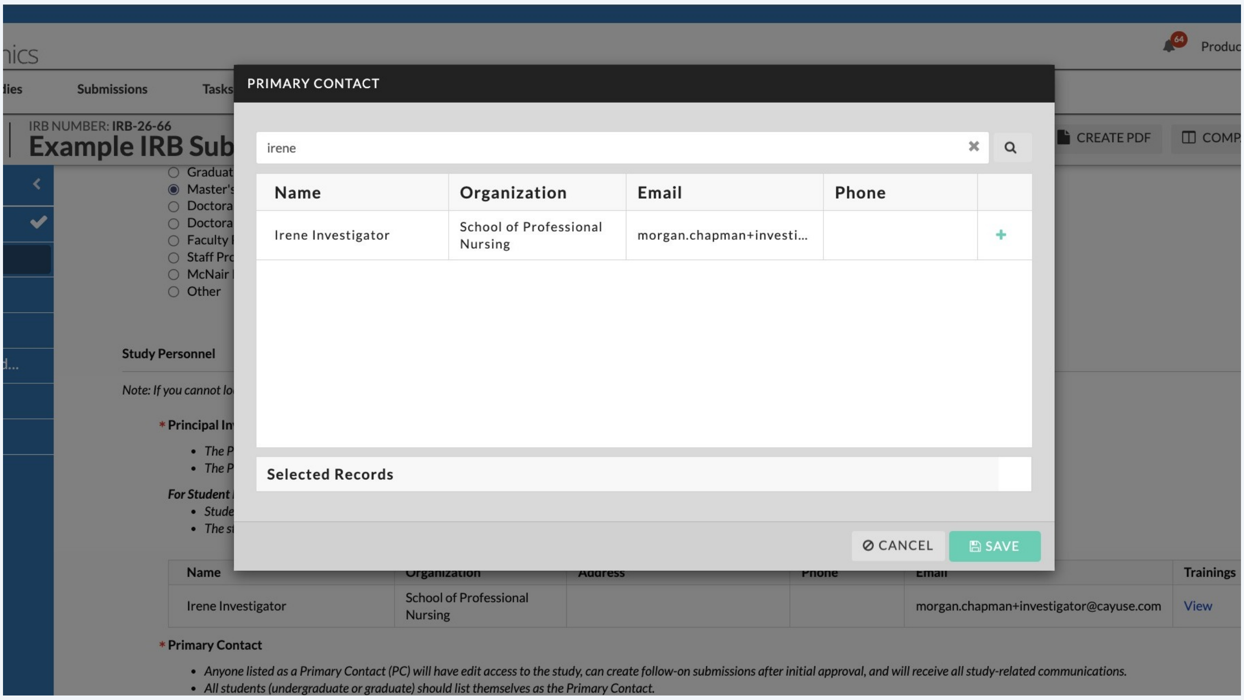


18 Navigate to the primary contact section below and select "**Primary Contact Find People".**

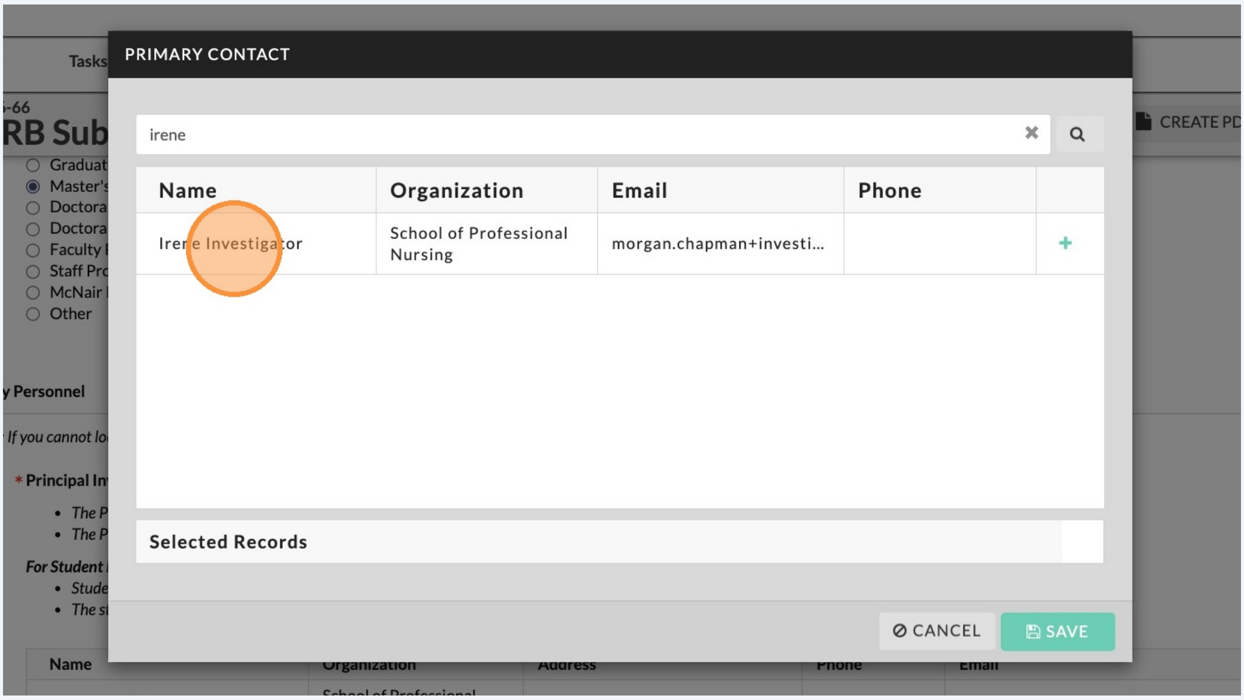


19 Utilize the search bar to locate a primary contact.

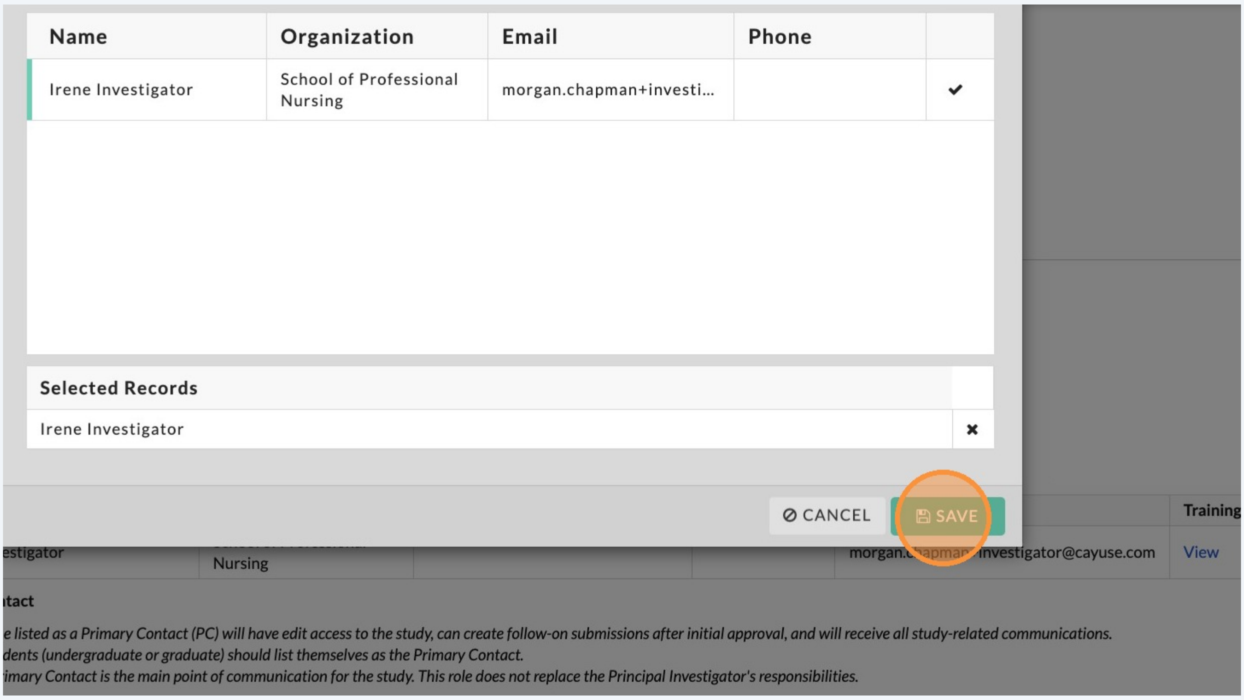
Important: All students MUST list themselves as the primary contact so they can have access to edit their document(s), and receive all relevant communications.



20 Click on the name that appears on the dropdown menu.

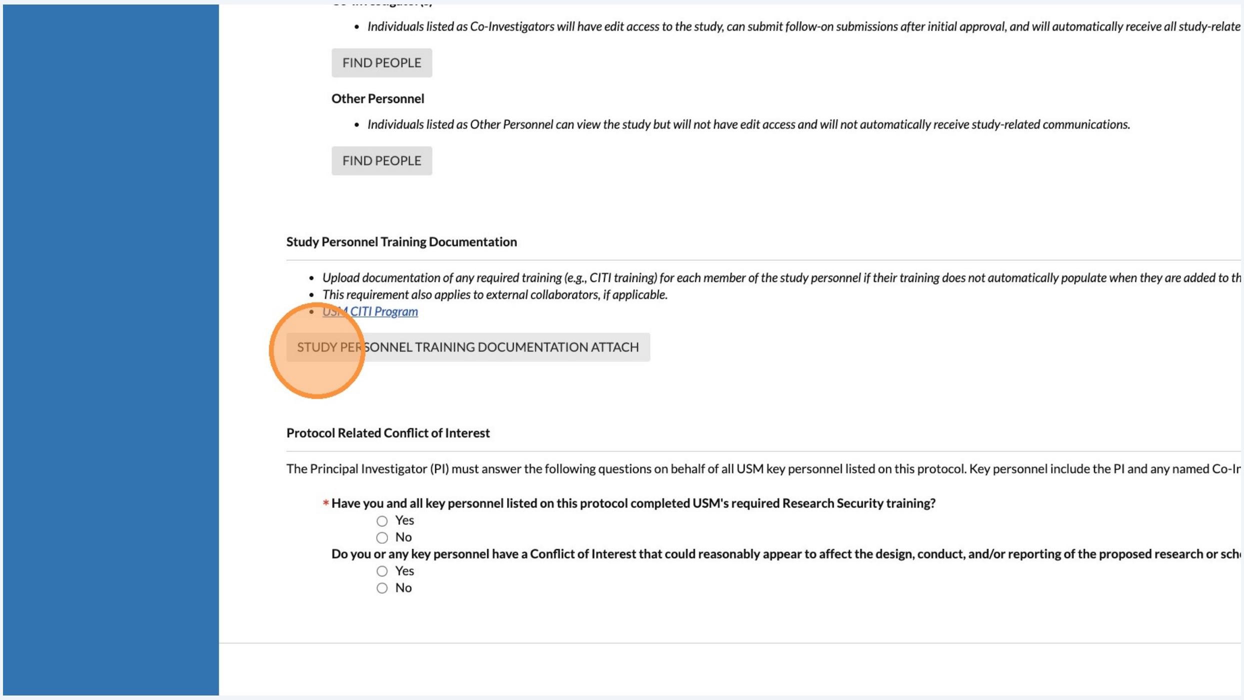


21 Click **"Save"**

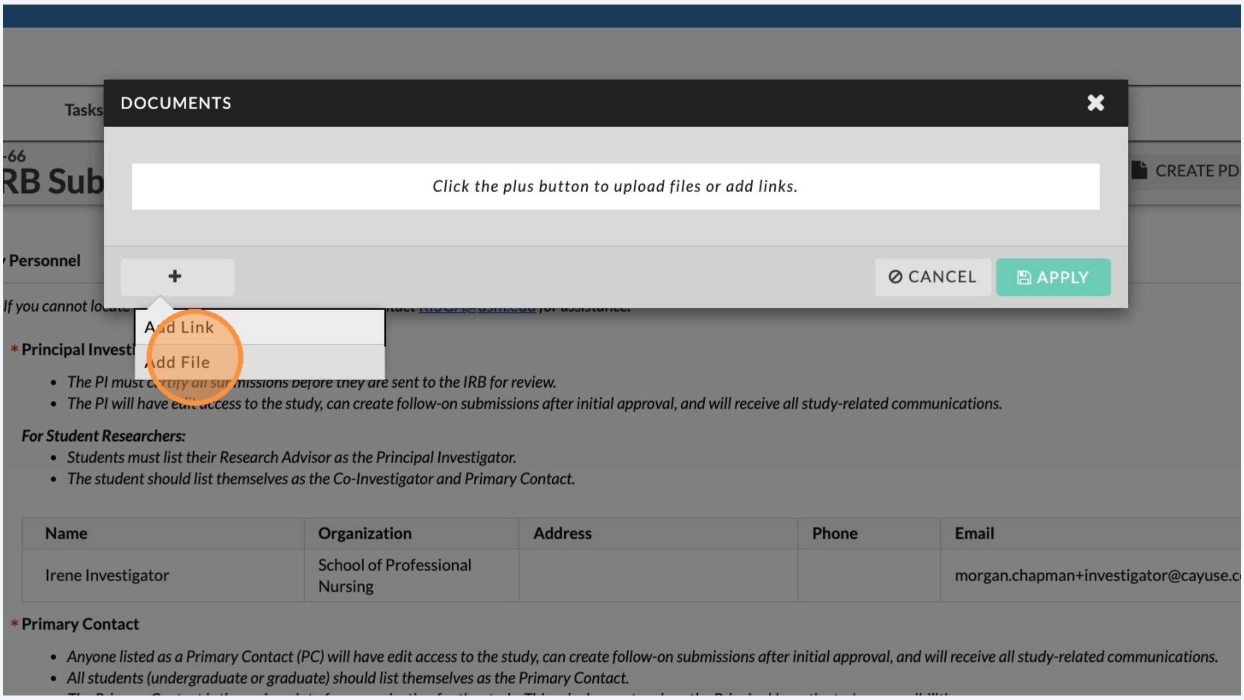


22 Next, navigate to the **"Study Personnel Training Documentation"** section.

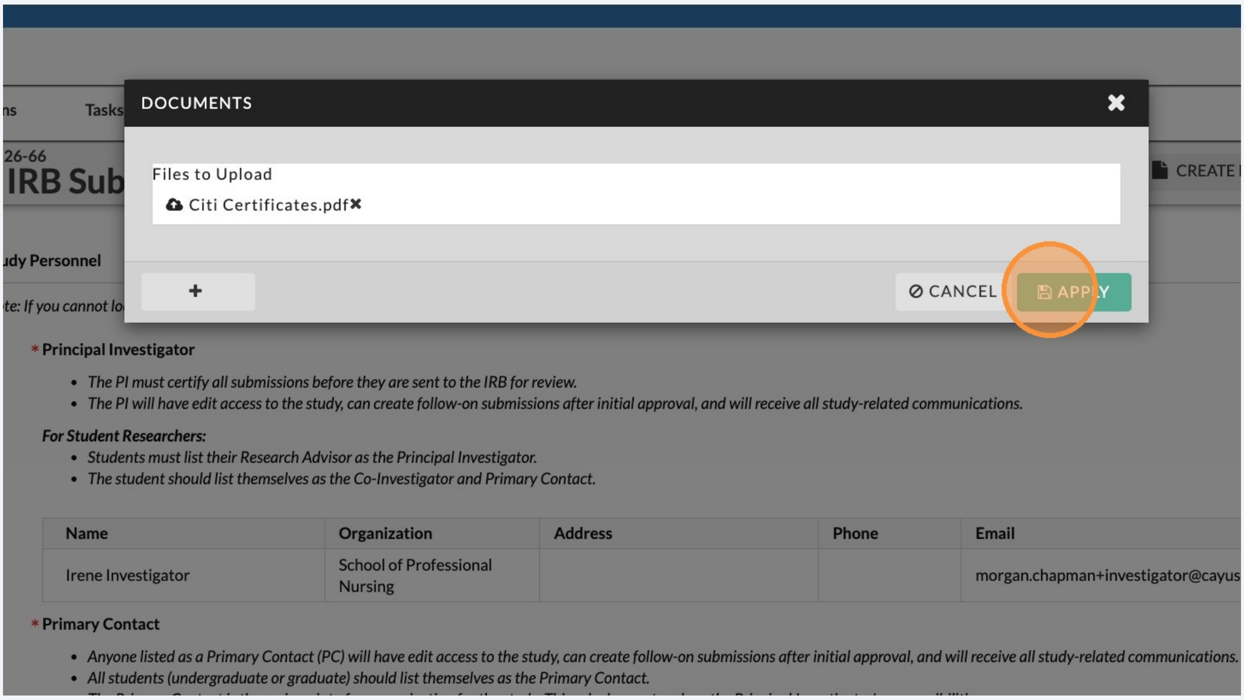
Select "Study Personnel Training Documentation Attach" to attach any required training certificates.



23 Select **"+"** to upload any relevant training attachment(s) or certificate(s).

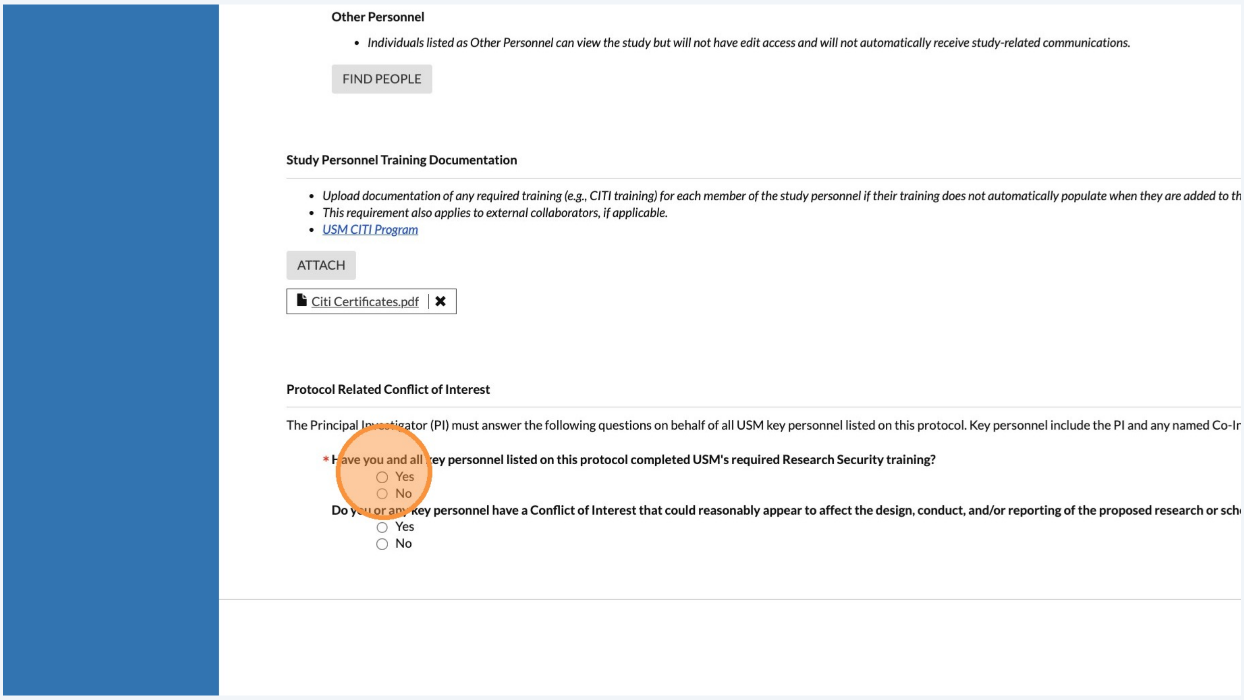


24 Once you select those items, press **"Apply"** so each file can populate onto your protocol.

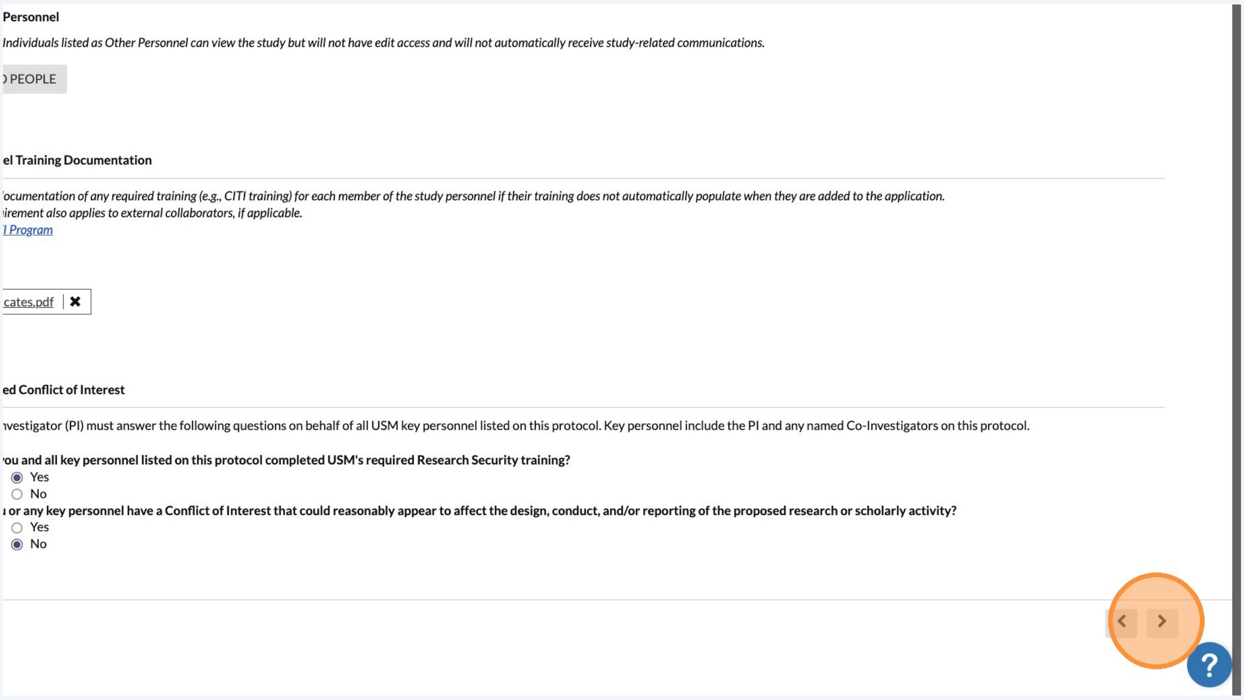


25 Next, navigate to the **"Conflict of Interest"** section.

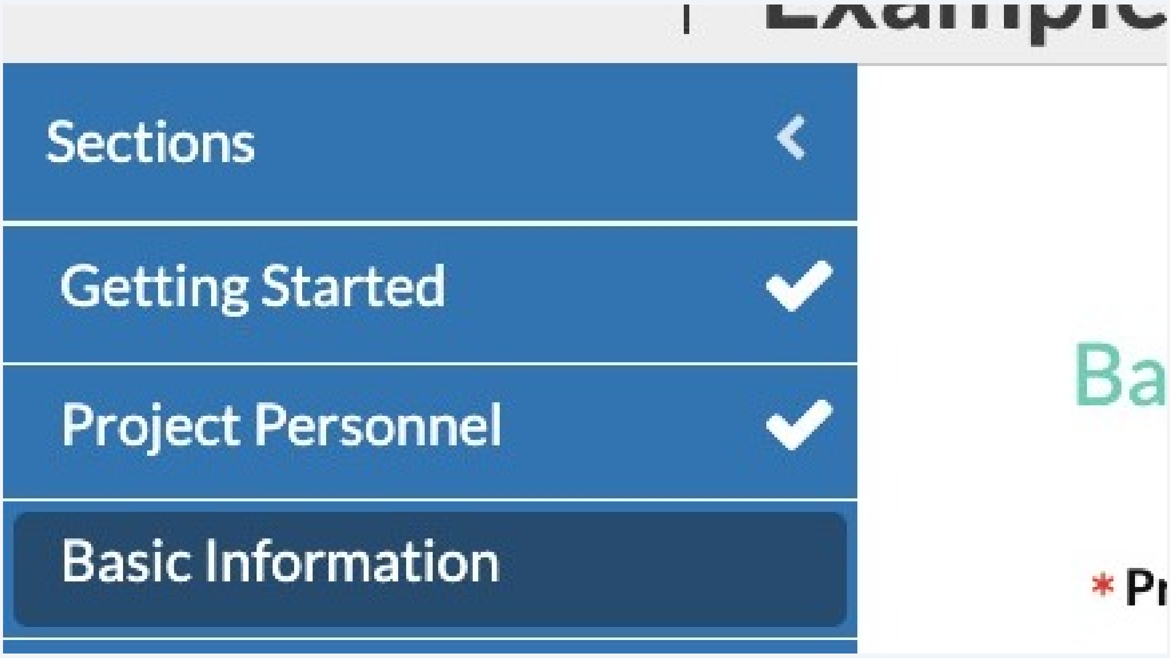
Answer all relevant questions to the best of your ability.



26 When each question is answered, **click here** to continue to the next page.

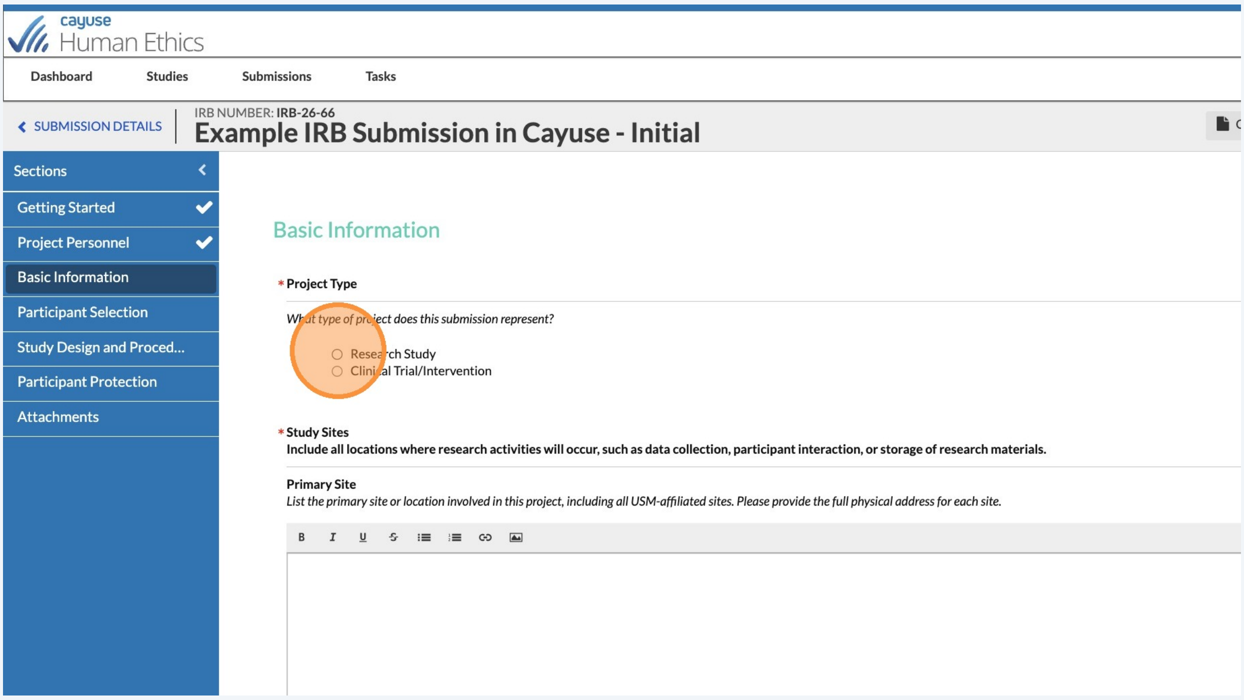


27 **Note: You should now have a checkmark by the Project Personnel tab, IF you have completed all required questions.**



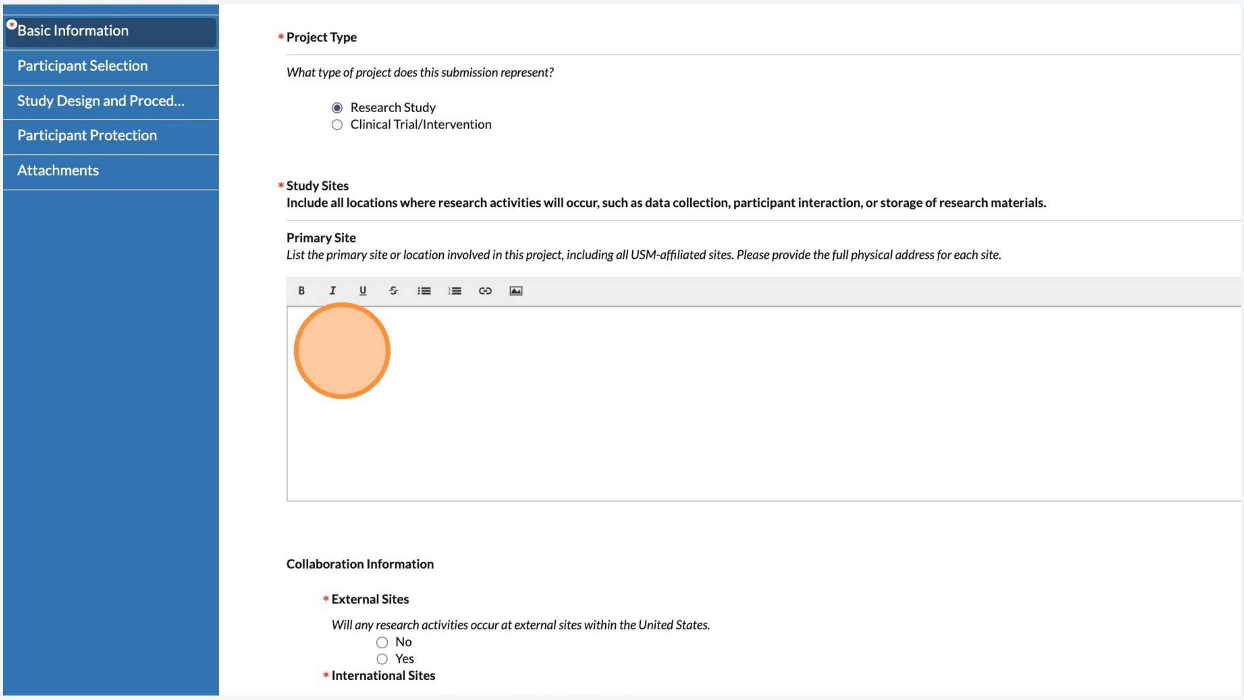
28 You are now on the "Basic Information Page".

The first question asks you to select the type of project that your submission reflects.



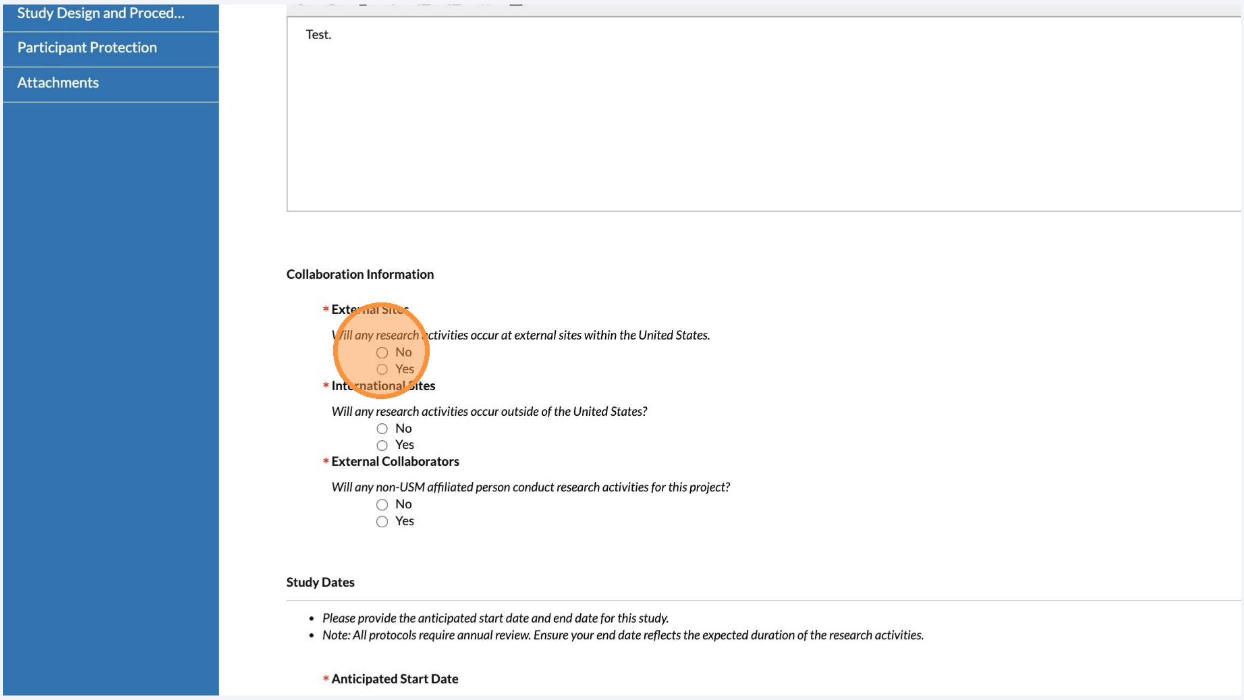
29 Next, navigate to the **"Study Sites"** portion below.

List all locations where your research activities will take place.

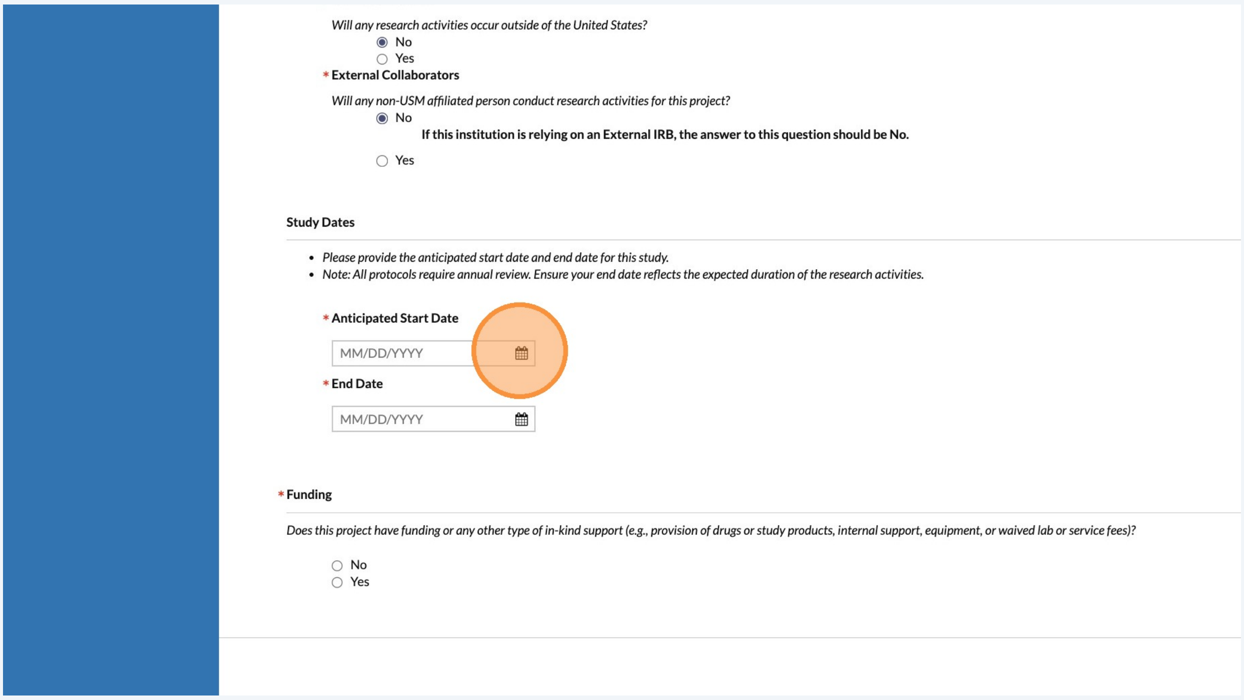


30 Navigate to the **"Collaboration Information**" section.

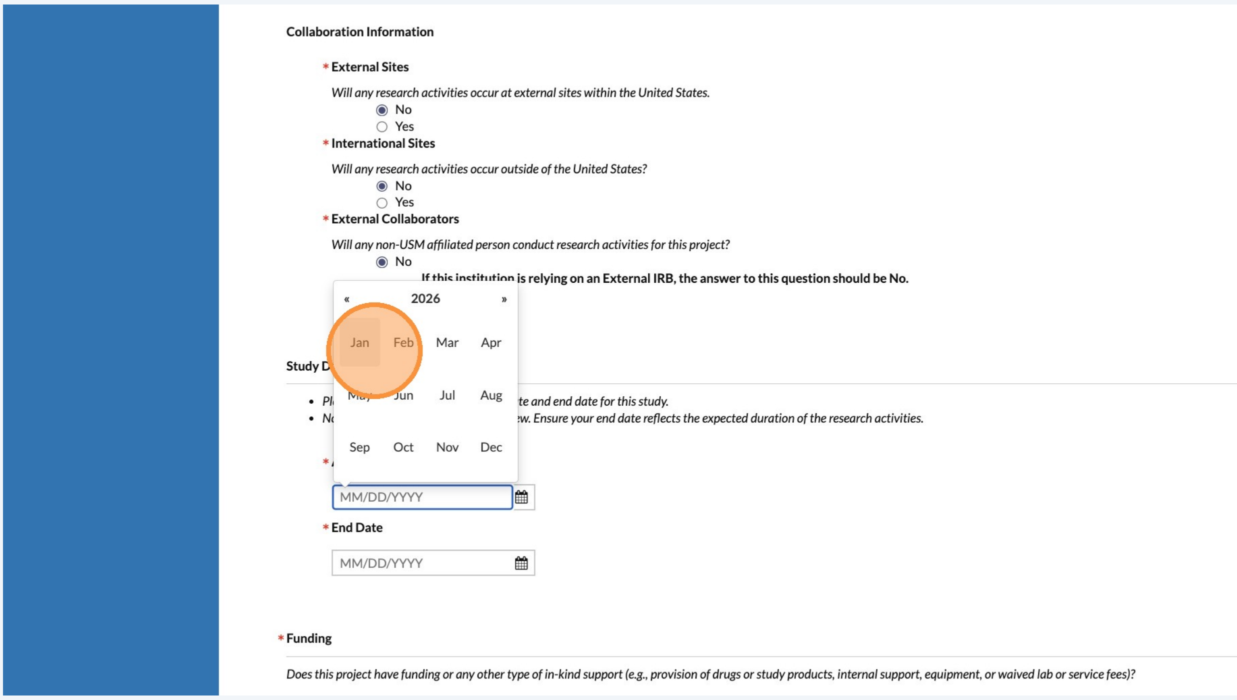
Answer each of the required questions accordingly.



31 Next, navigate to the **"Study Dates"** section to provide the anticipated start and end date(s) of your study.

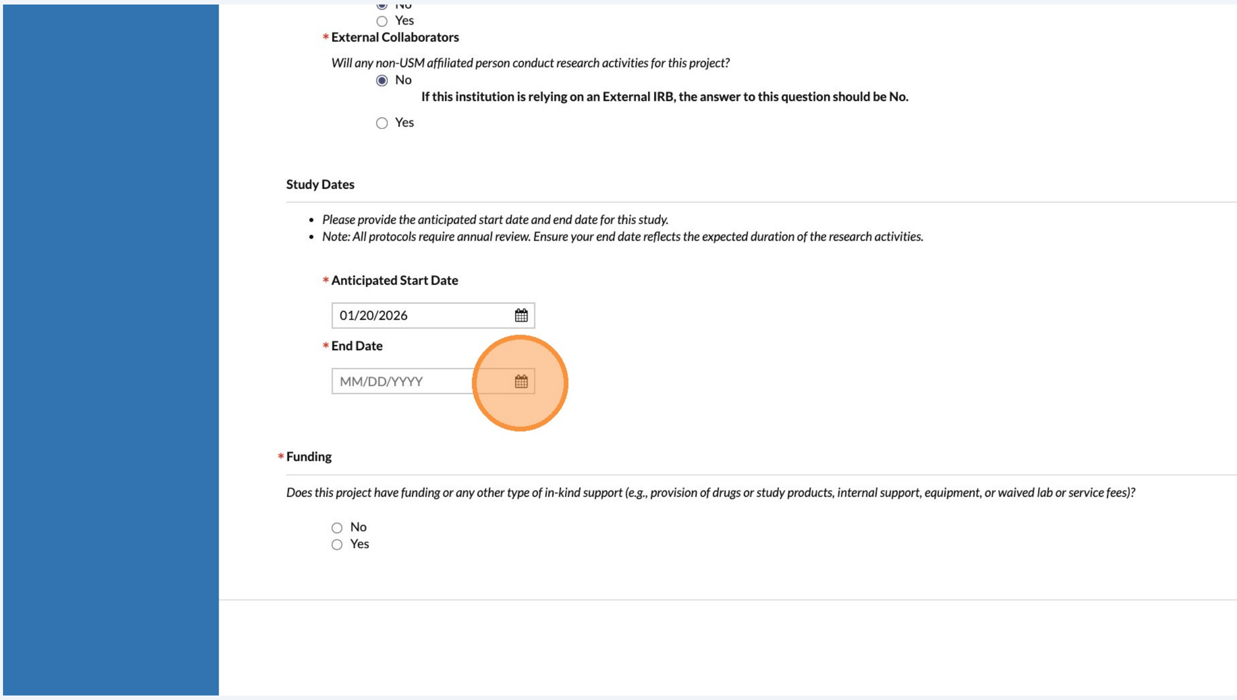


32 Please use the dropdown calendar to select the desired dates.

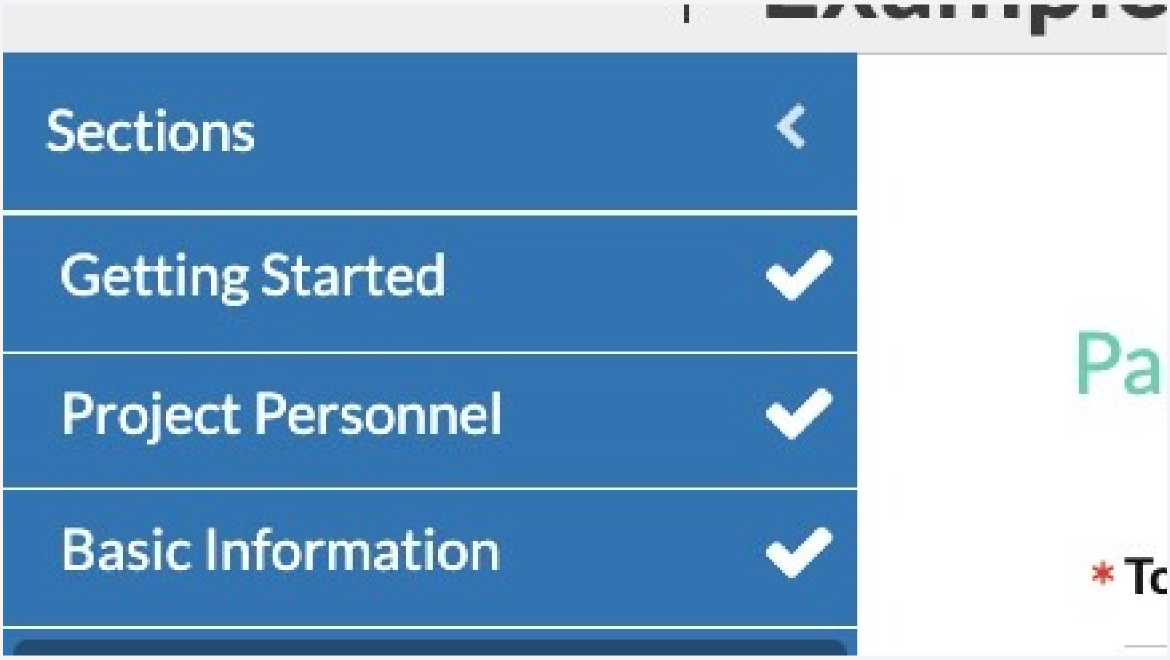


33 Finally, navigate to the **"Funding"** section.

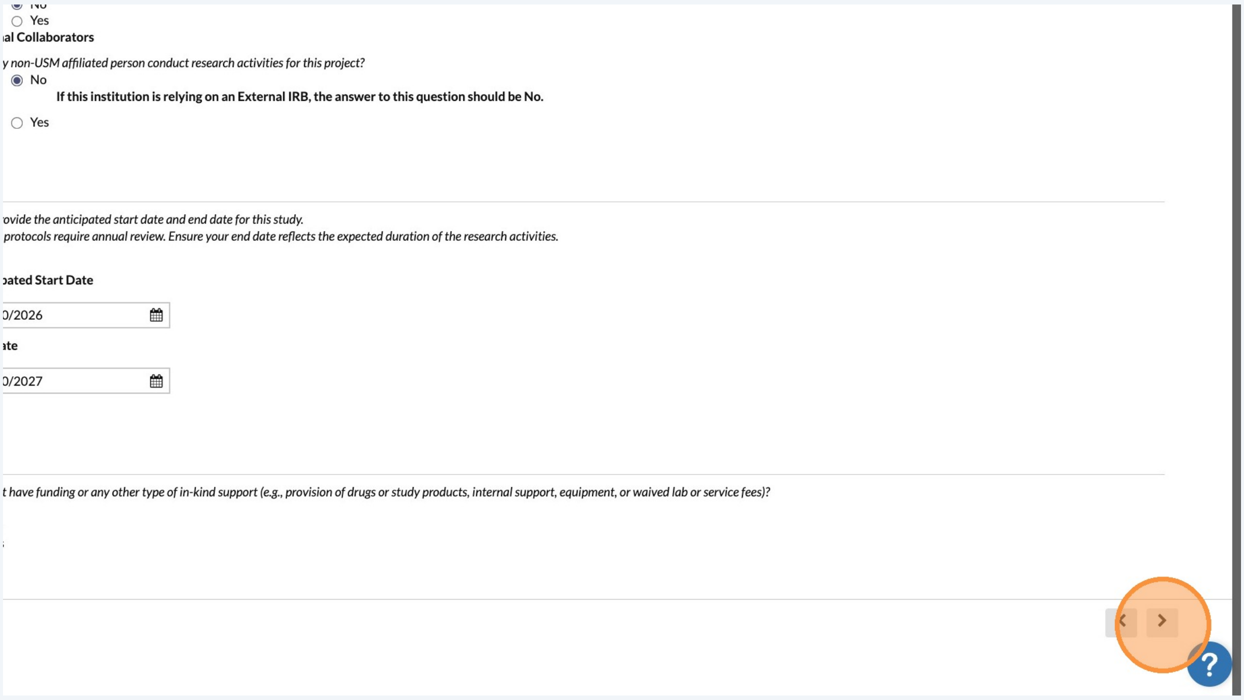
Acknowledge if your project has any funding or any other type of in-kind support.



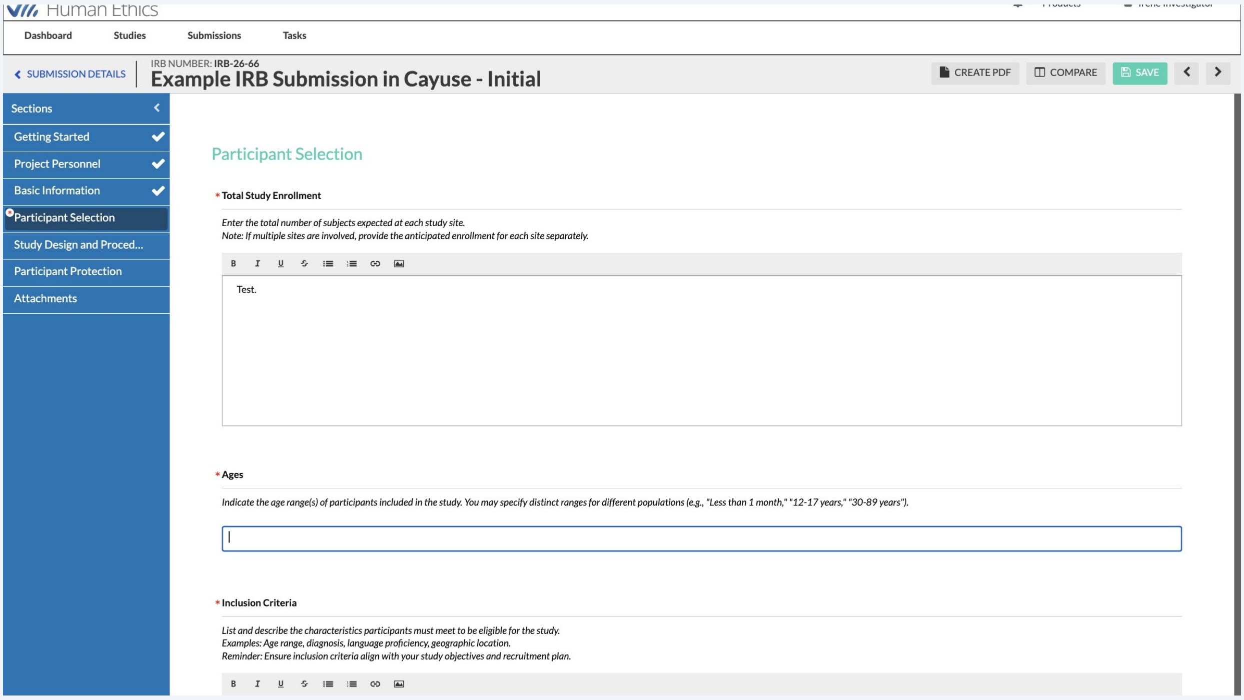
34 Note: The **"Basic Information"** tab on the left hand side should now have a check mark beside it, if you have completed each of the required questions.



35 **Click here** to continue to the next page.

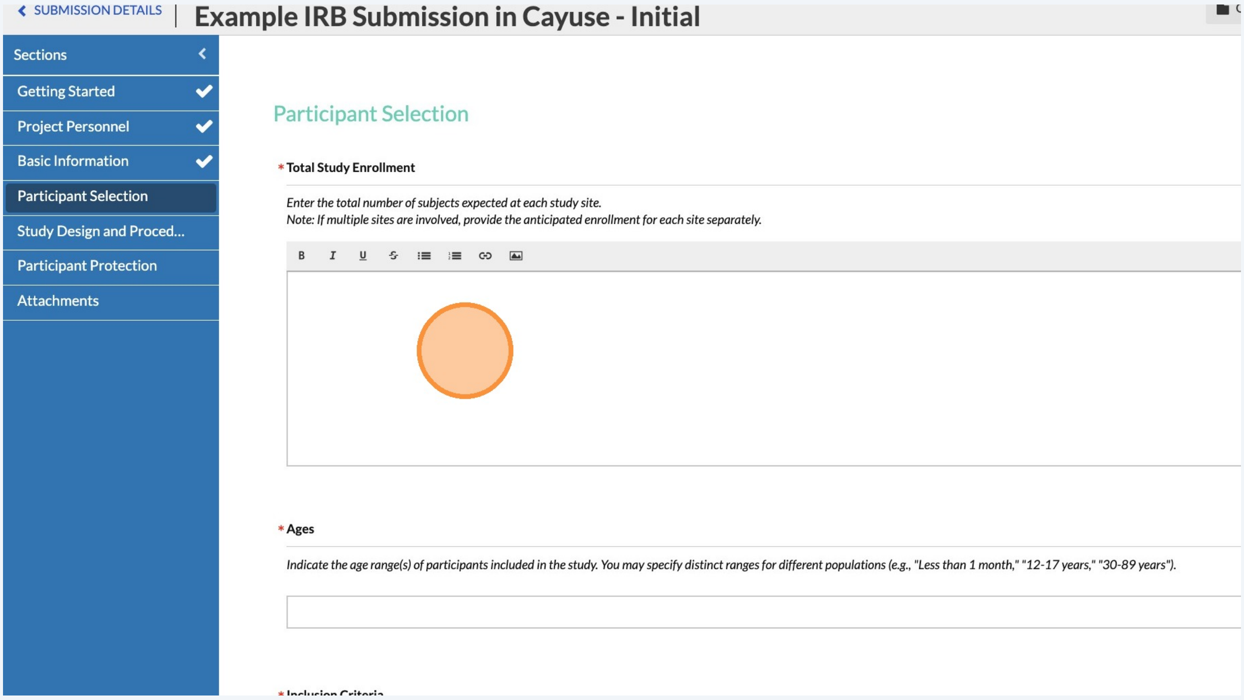


36 You have now reached the "**Participant Selection"** page.



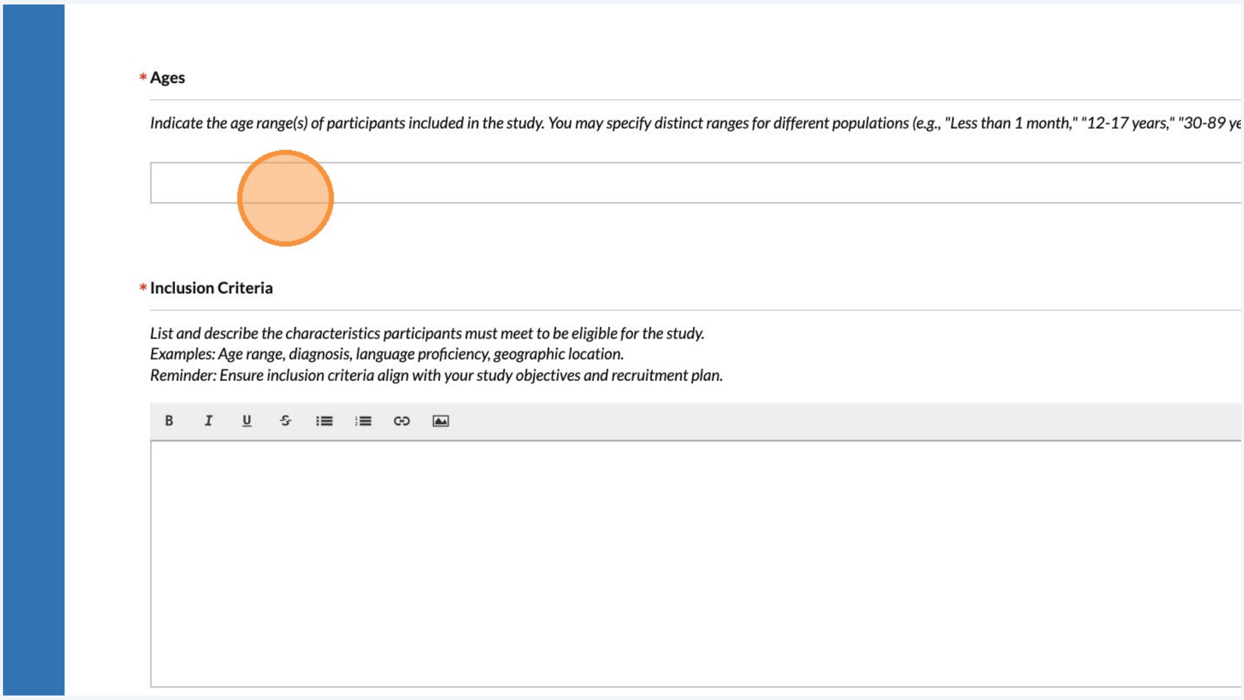
37 Locate the **"Total Study Enrollment"** section

Enter the total number of subjects expected at each study site using the text box.



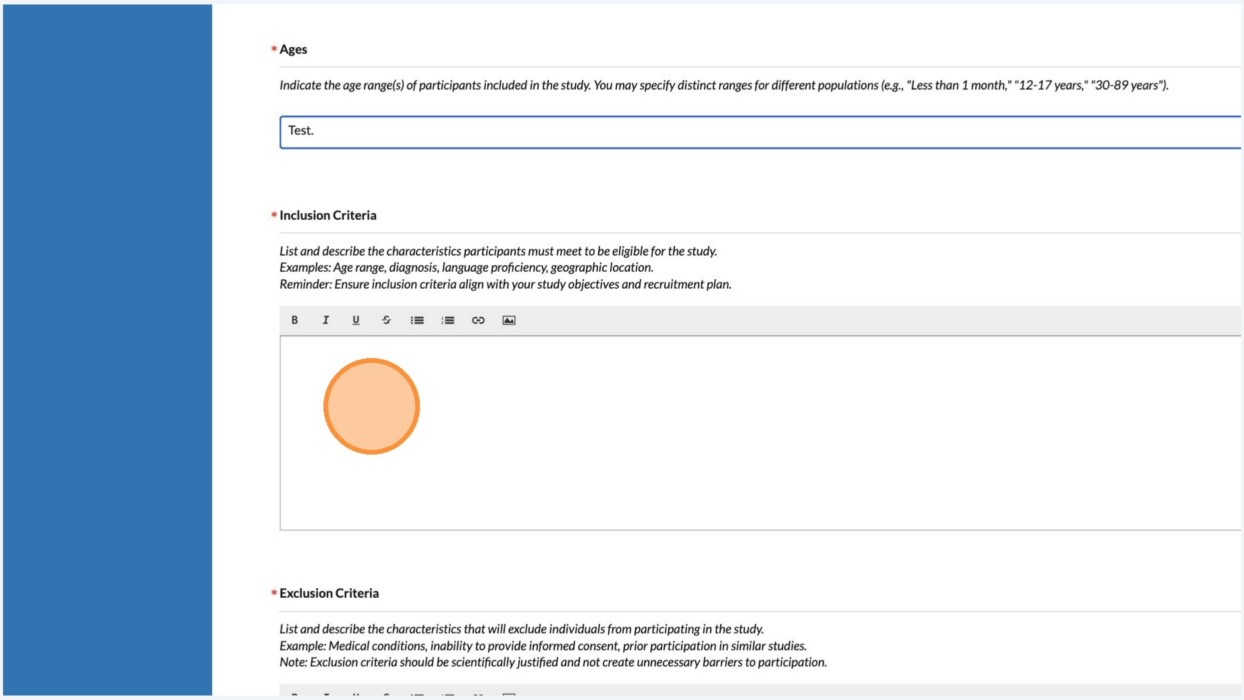
38 Continue to the **"Ages"** field.

Indicate the desired age range of participants in your study.



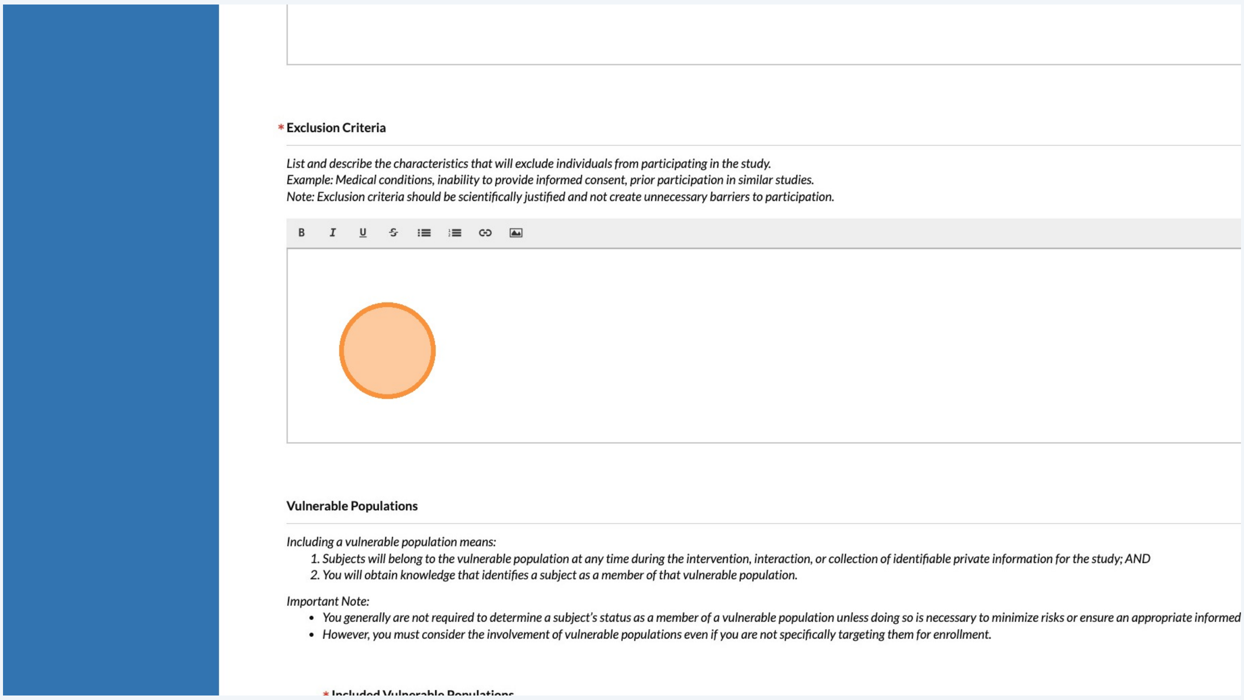
39 Next, move forward to the **"Inclusion Criteria"** section.

List and describe all eligibility requirements for your study.



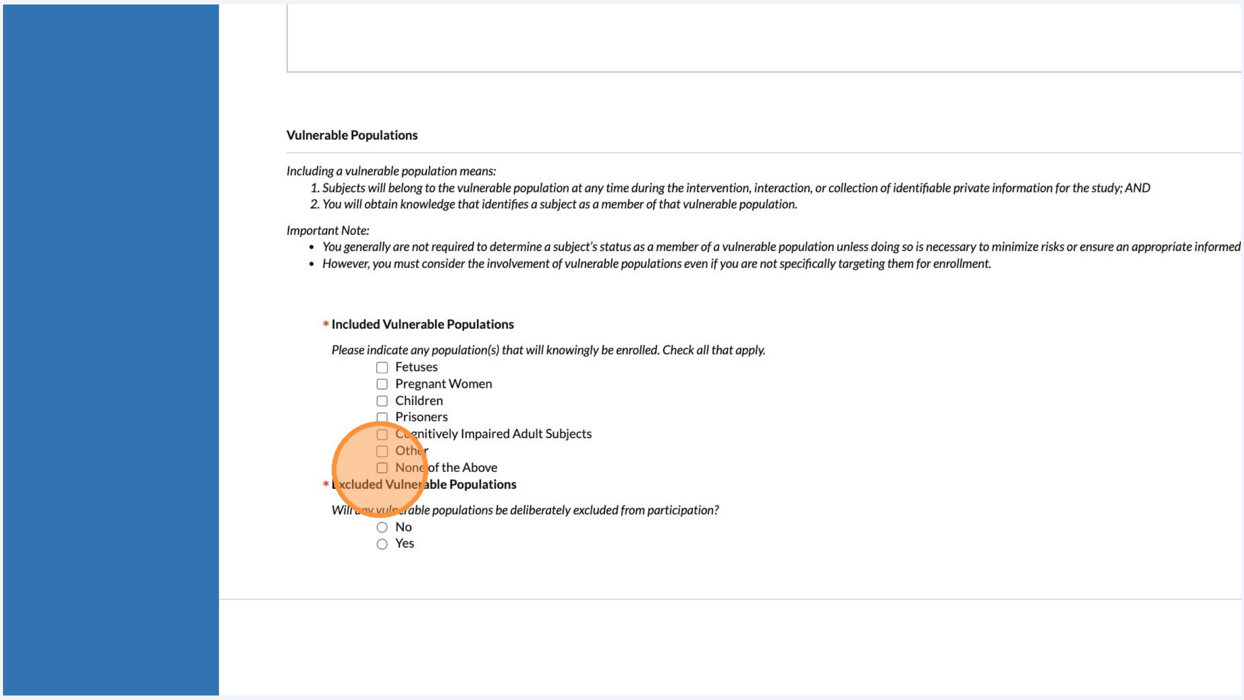
40 Next is the **"Exclusion Criteria"** section.

List and describe all characteristics that will exclude individuals from participating in your study.

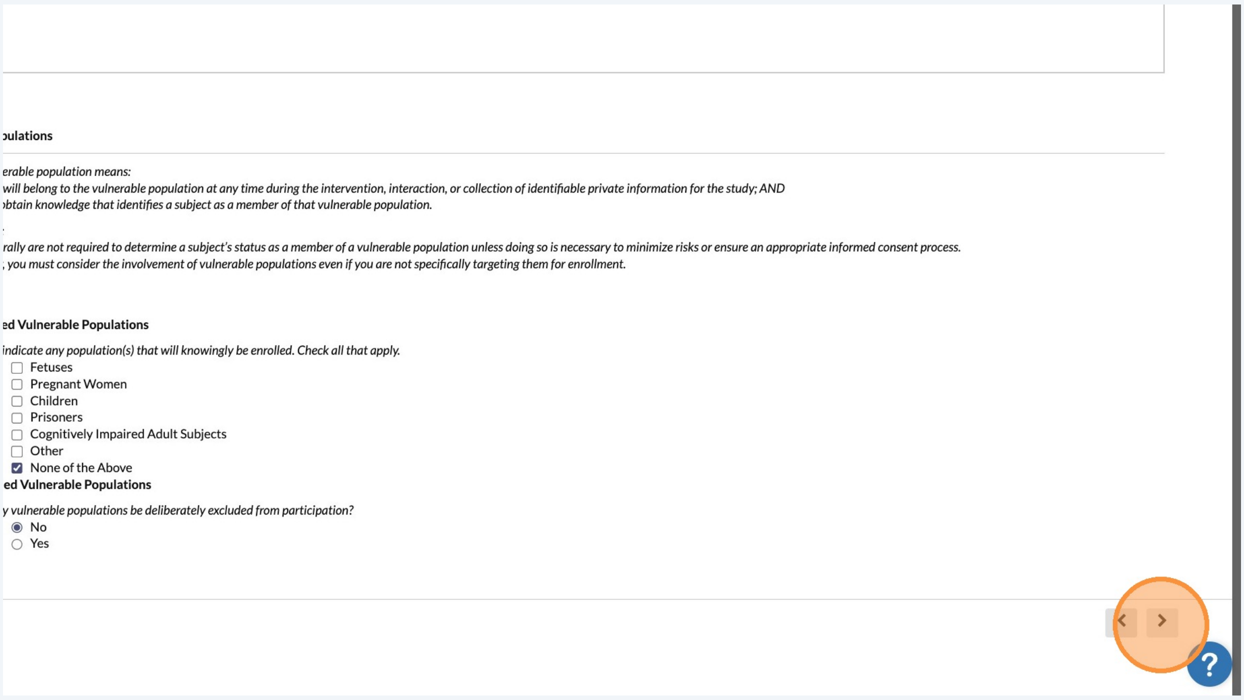


41 Continue to the "**Vulnerable Populations"** Section.

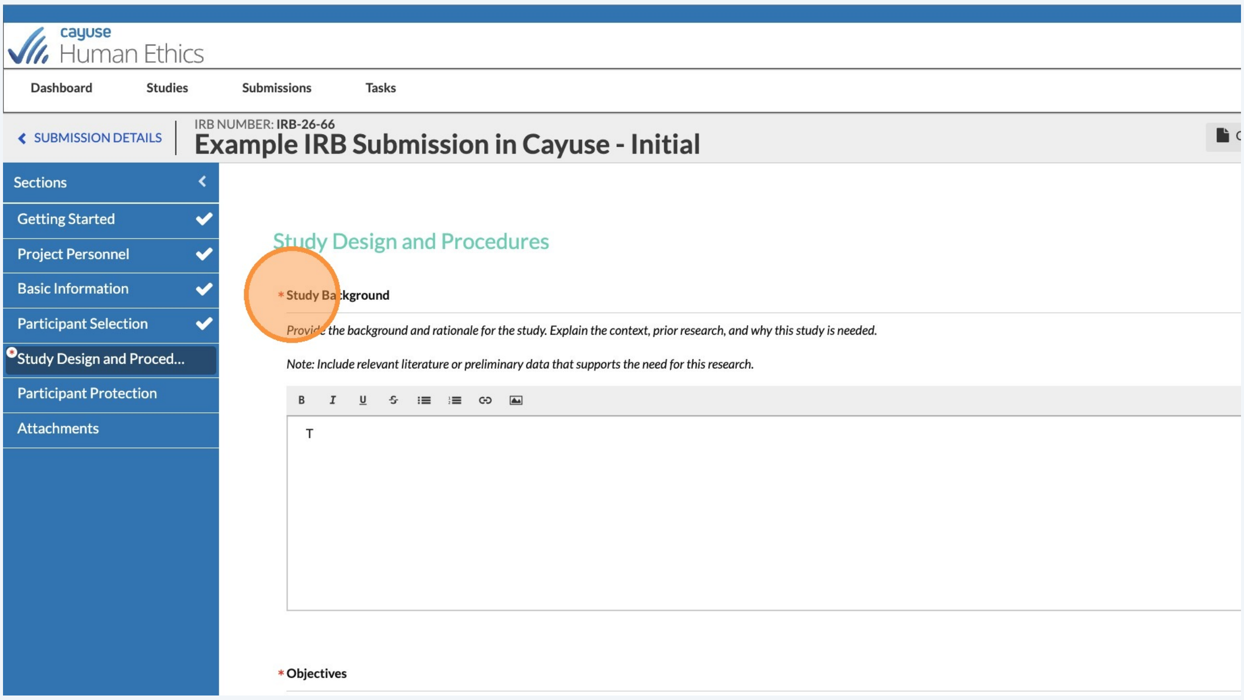
Answer each of the required questions under "**Included Vulnerable Populations"** and "**Excluded Vulnerable Populations".**



42 When each of the required questions are answered, **Click here.**

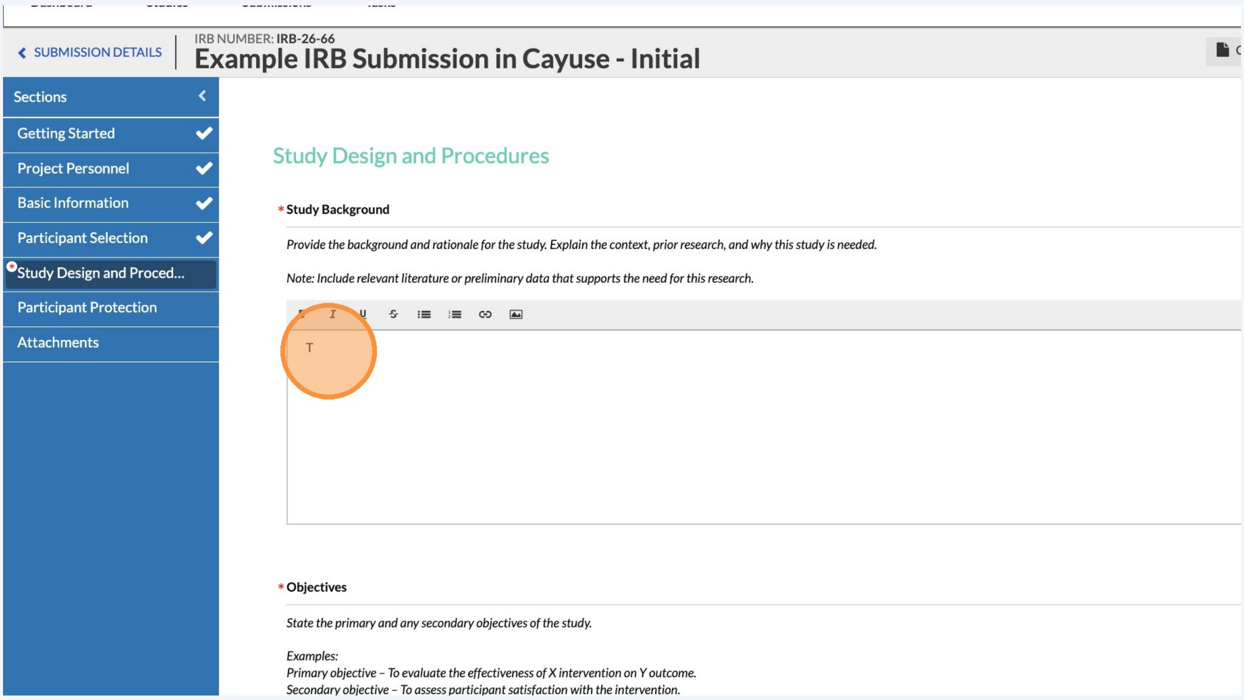


43 You have now reached the **"Study Design and Procedures"** page.



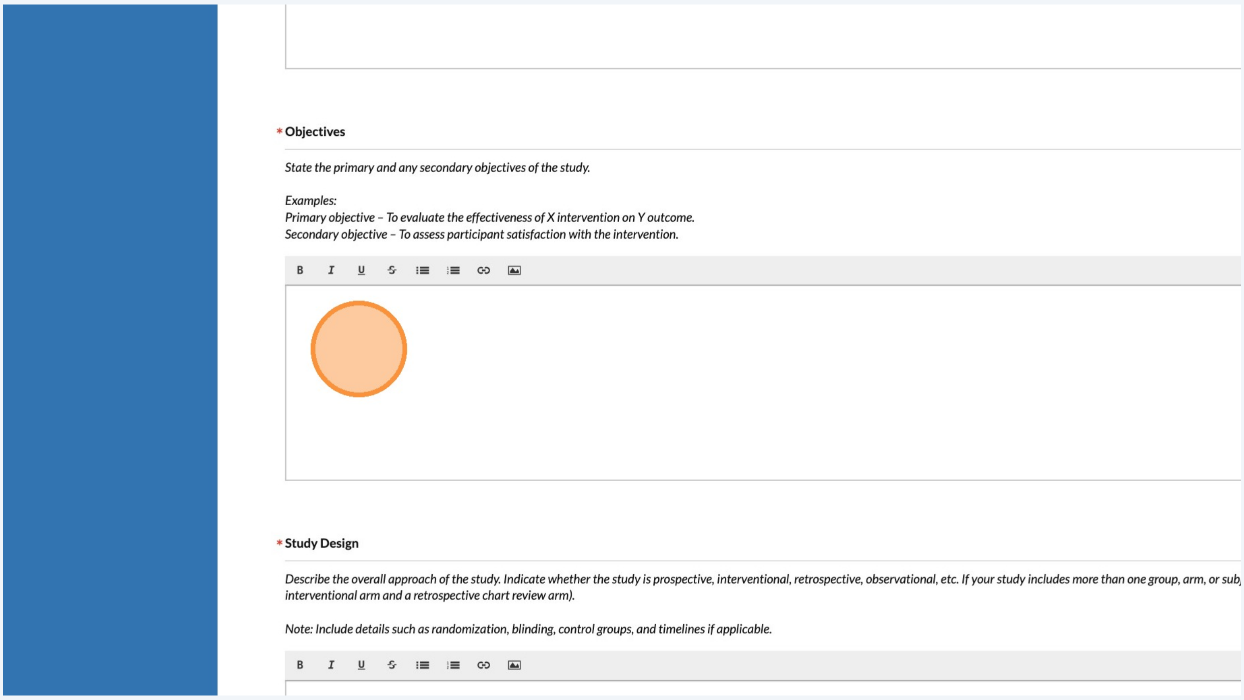
44 Locate the **"Study Background"** section.

Use the text box to provide the background and rationale of your study.



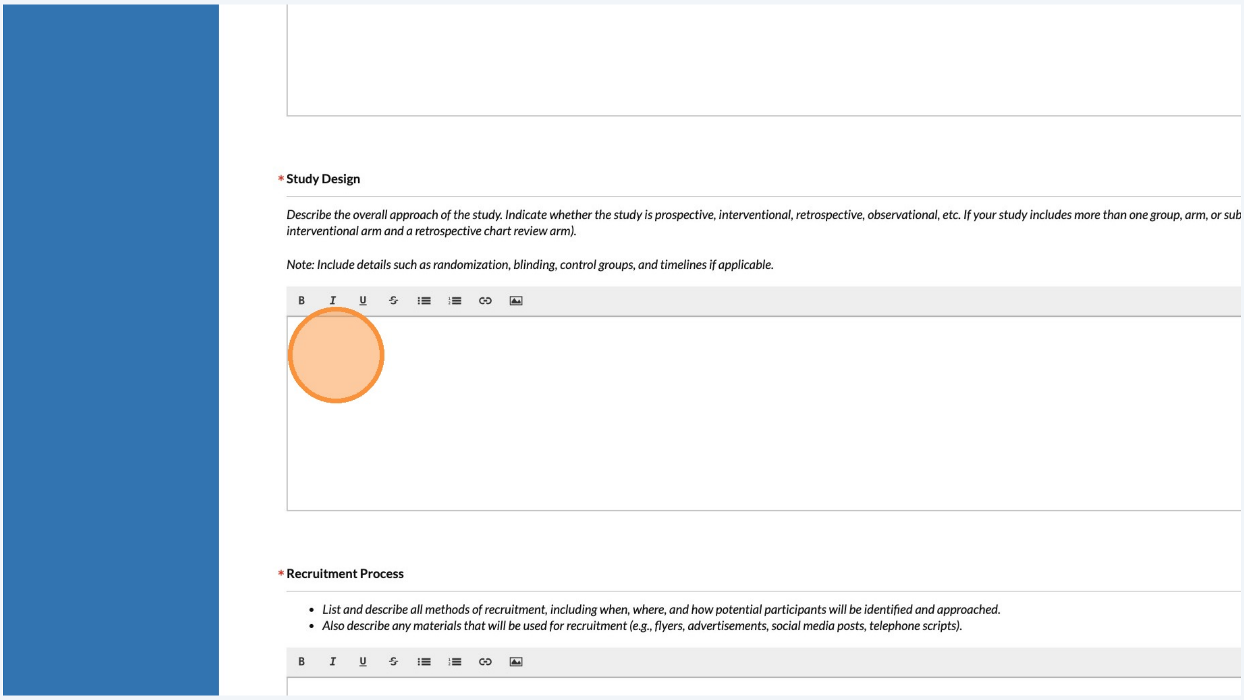
45 Move forward to the **"Objectives"** section.

State the objective(s) of your study in the text box provided.



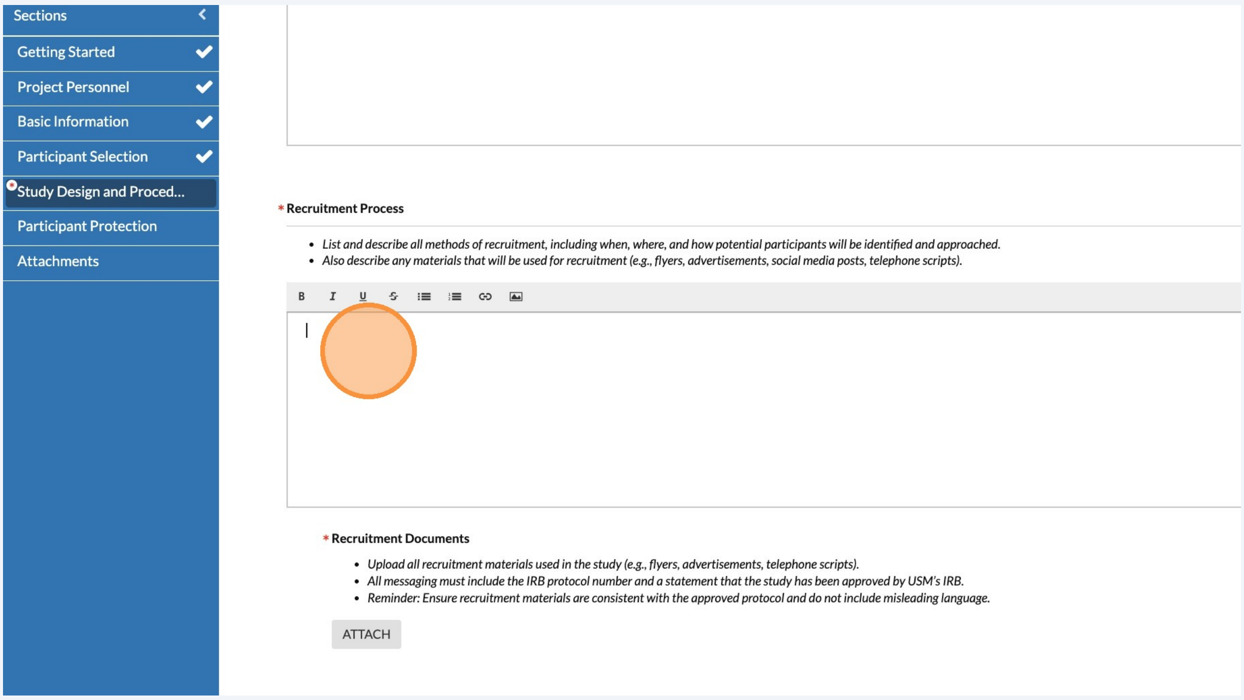
46 Next, locate the **"Study Design"** section.

Describe the approach of your study in the text box provided.

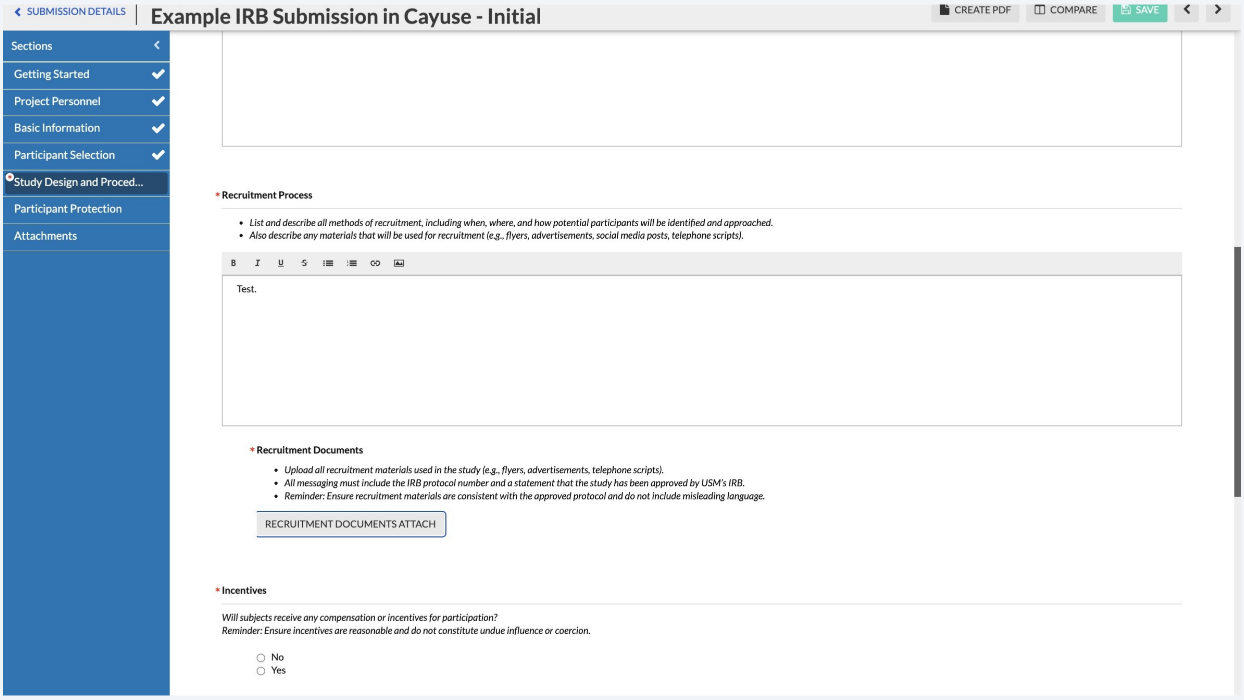


47 Next you'll see the **"Recruitment Process"** section.

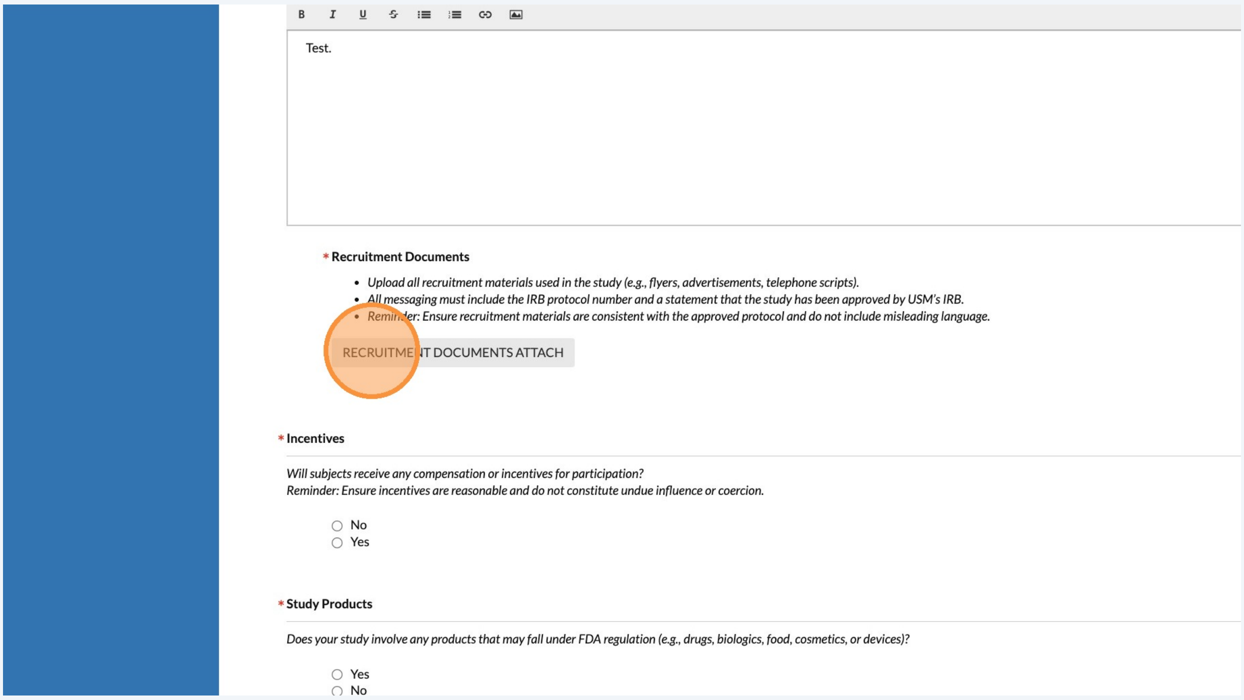
List and describe all methods of recruitment.



48 Below the text box, there will be a **"Recruitment Documents"** section.

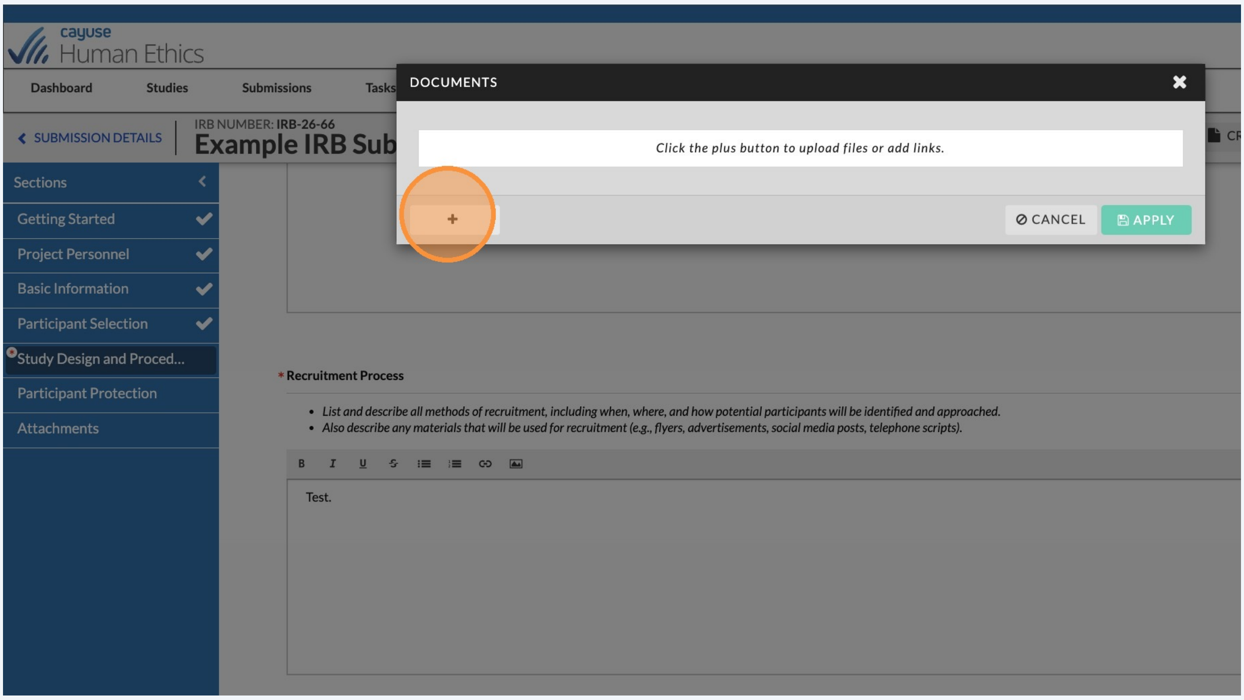


49 Select "**Recruitment Documents Attach"** to upload all recruitment materials.

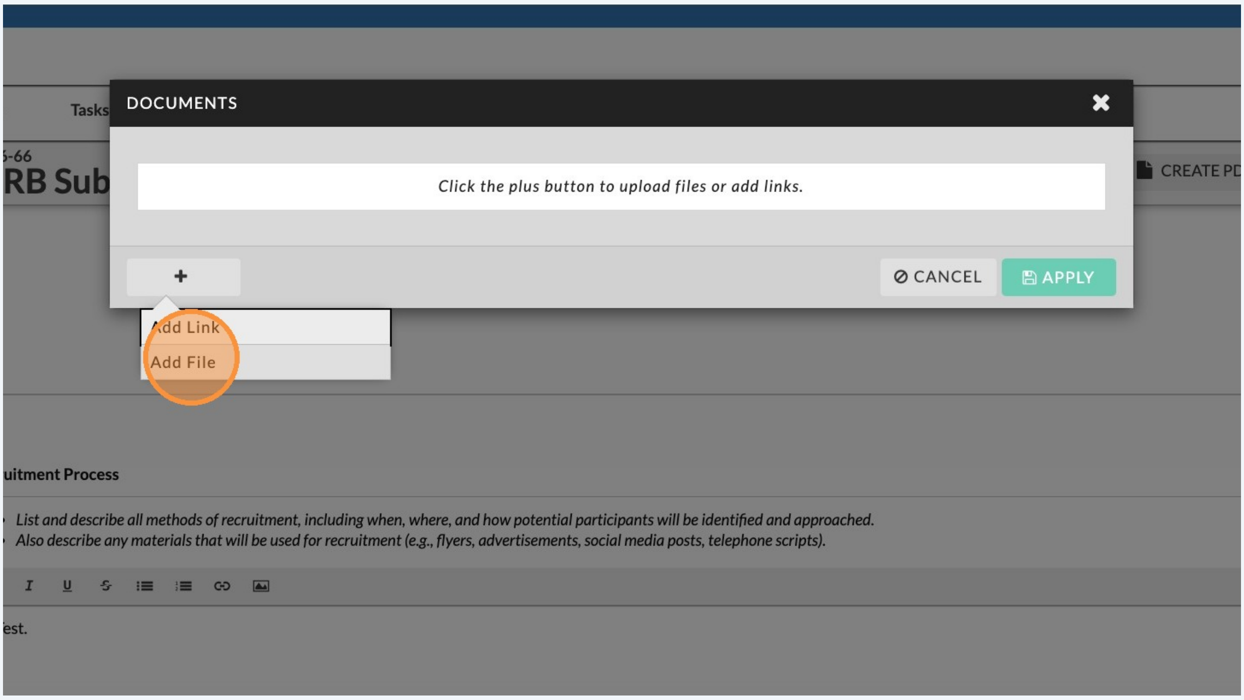


50 After selecting that option, a window will appear for you to attach documents.

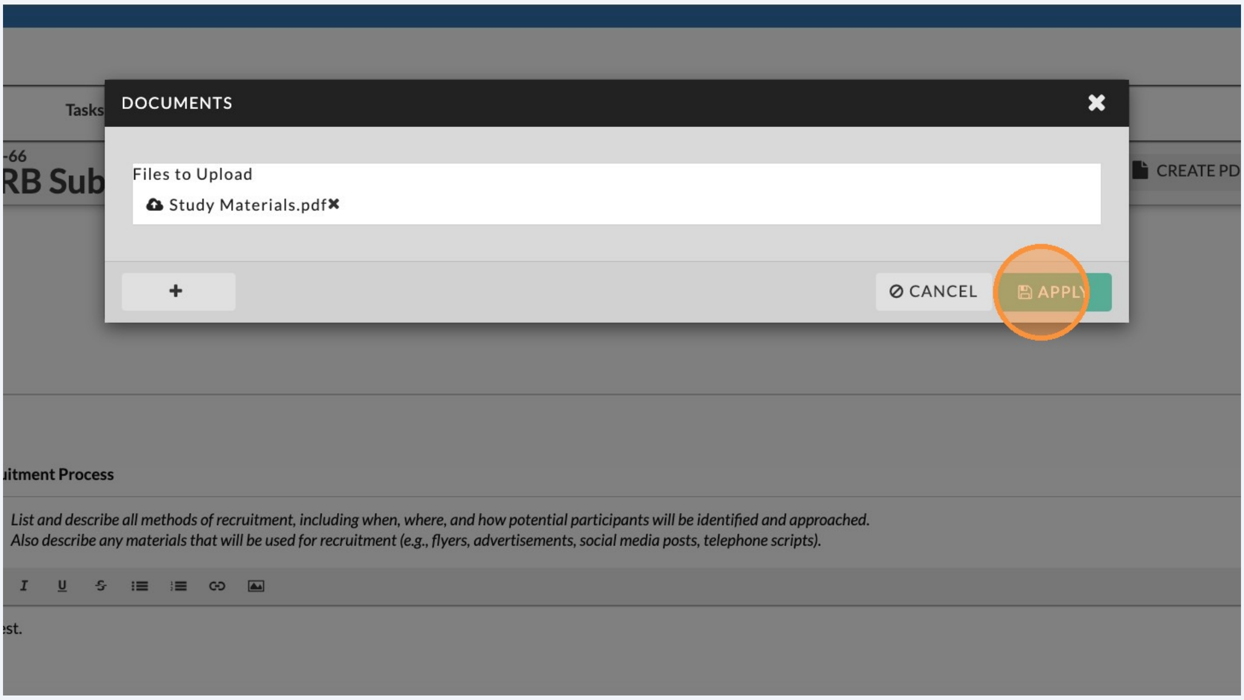
Select the **(+)** button.



51 Click **"Add File"**

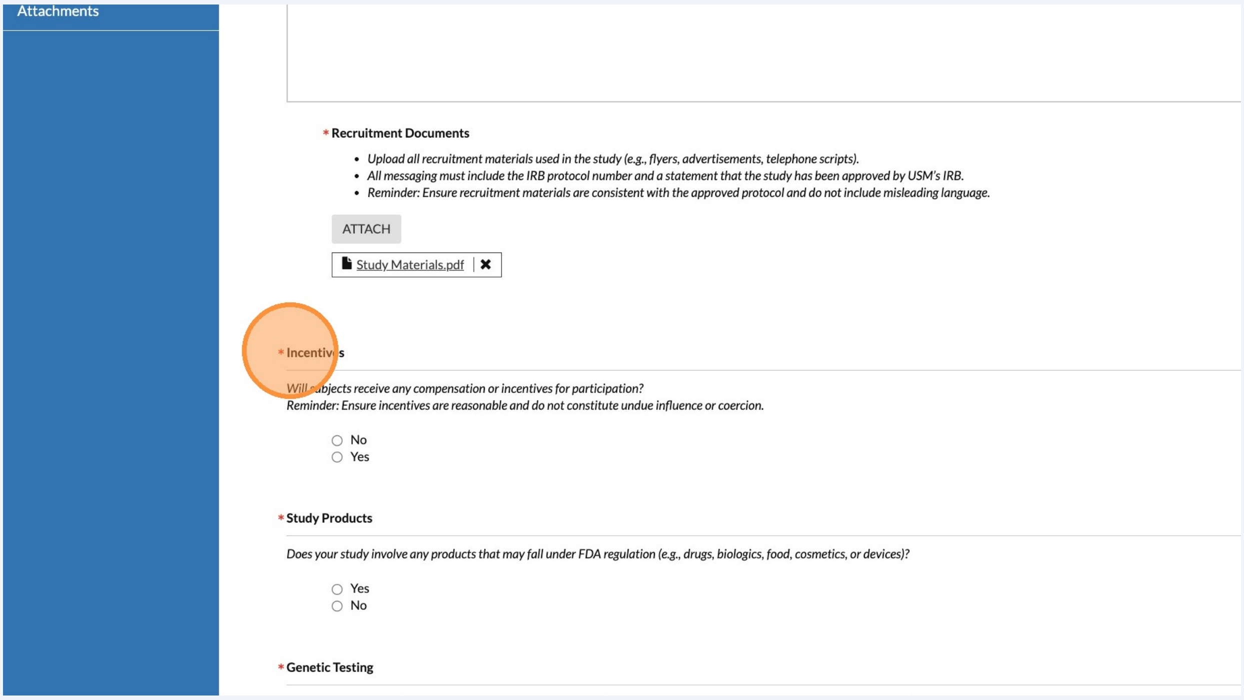


52 Click **"Apply"**



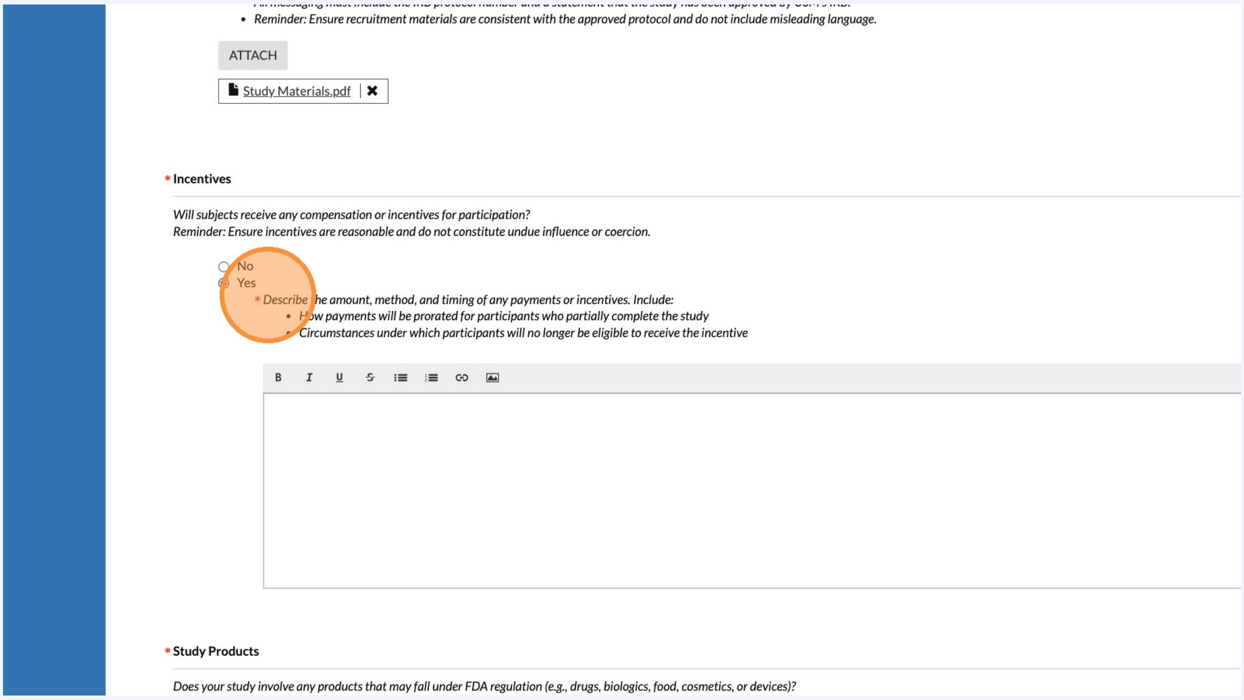
53 Next, is the **"Incentives"** section.

Acknowledge if subject will recieve any **incentives** (course credits, compensation, etc.) in your study.



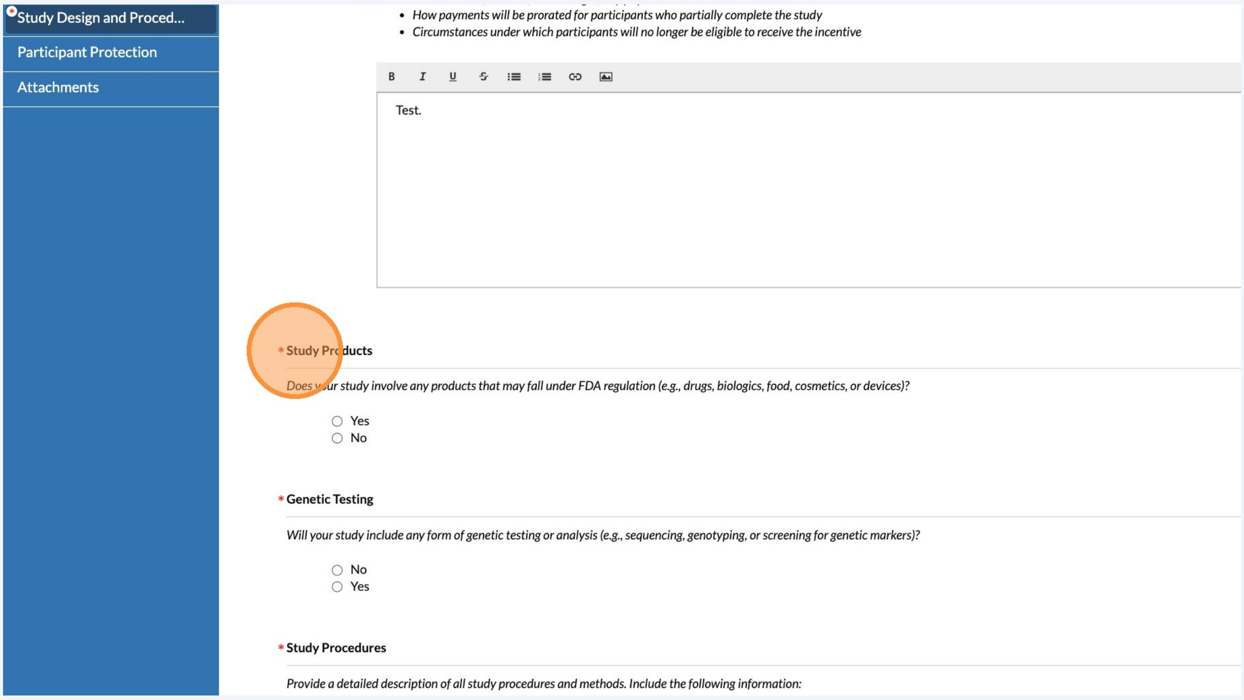
54 **If yes is selected, a text box will appear.**

You will be prompted to describe the amount, method, and timing of any payments or incentives.



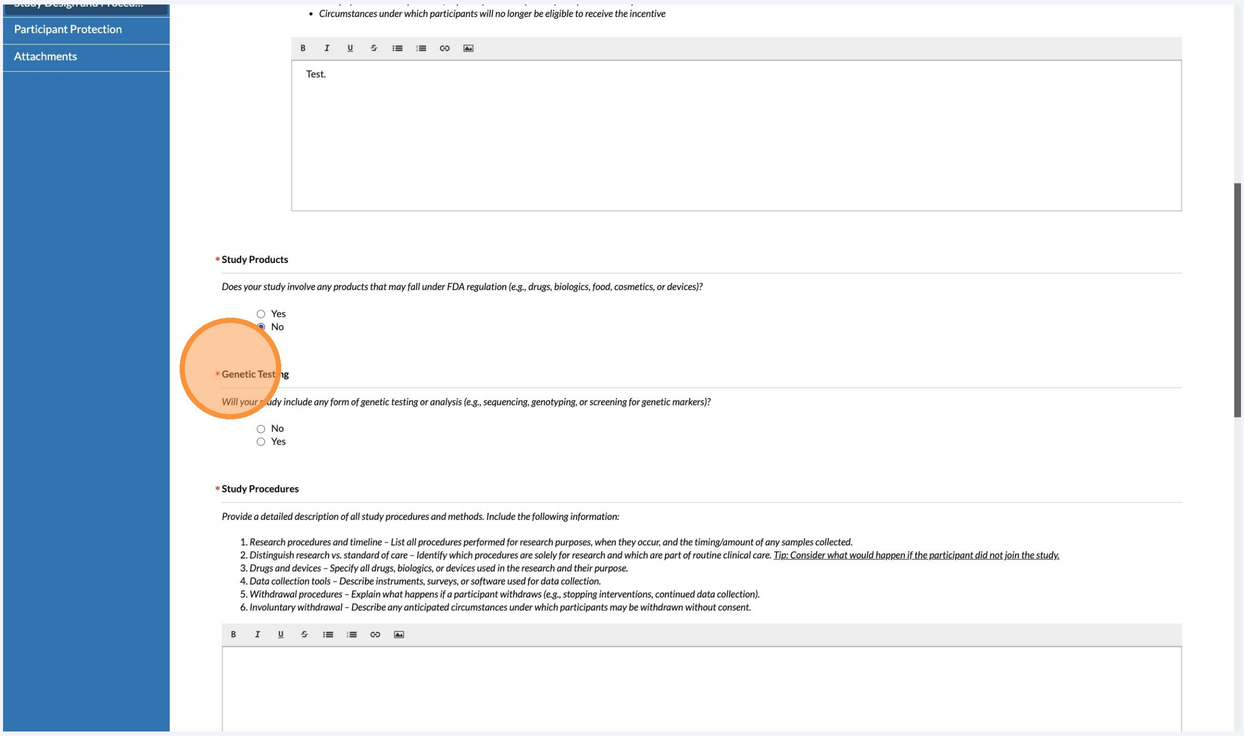
55 Next, navigate to the "**Study Products"** section.

Answer the required question(s).



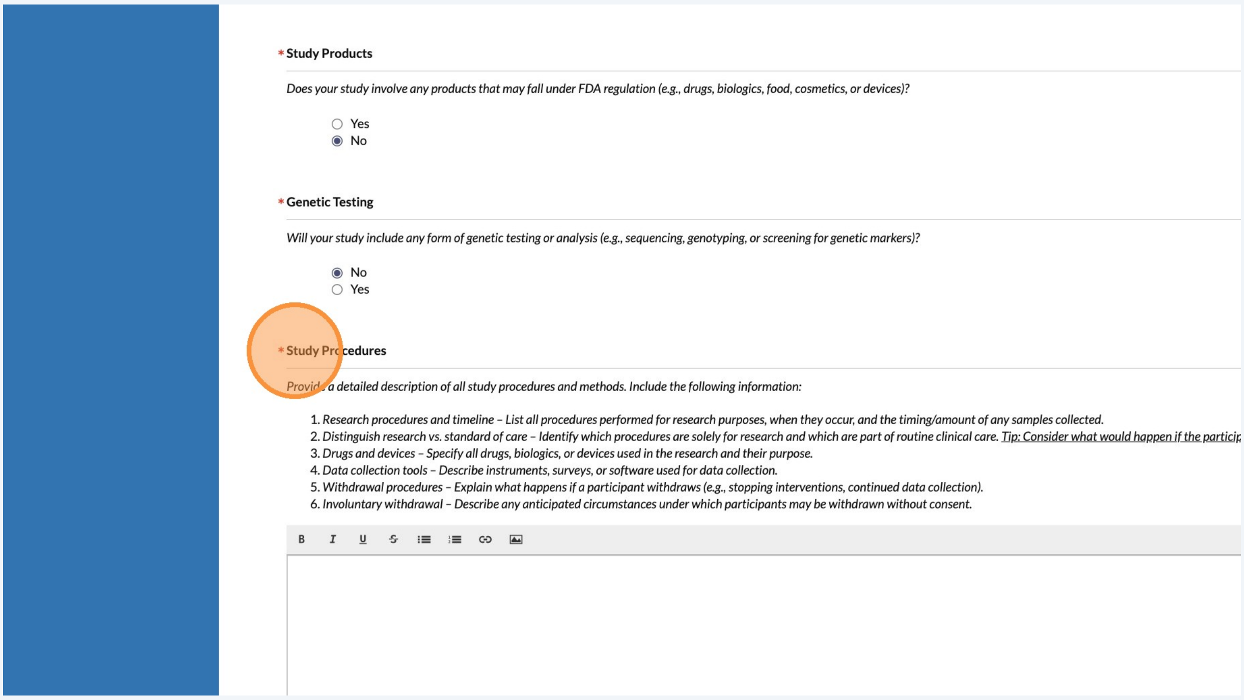
56 Scroll down to **"Genetic Testing"**

Answer the required question(s).



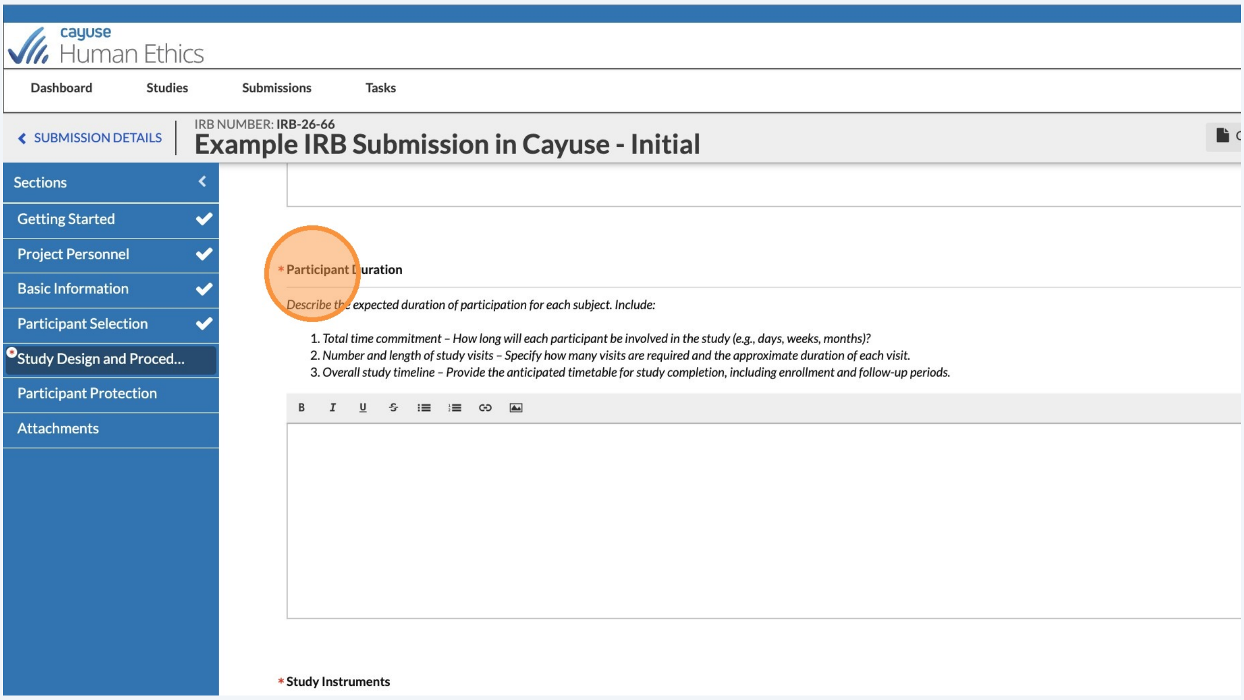
57 Next you'll see the **"Study Procedures"** section.

Provide a detailed description of all study procedures and methods.



58 Following that, you'll come across a **"Participant Duration"** section.

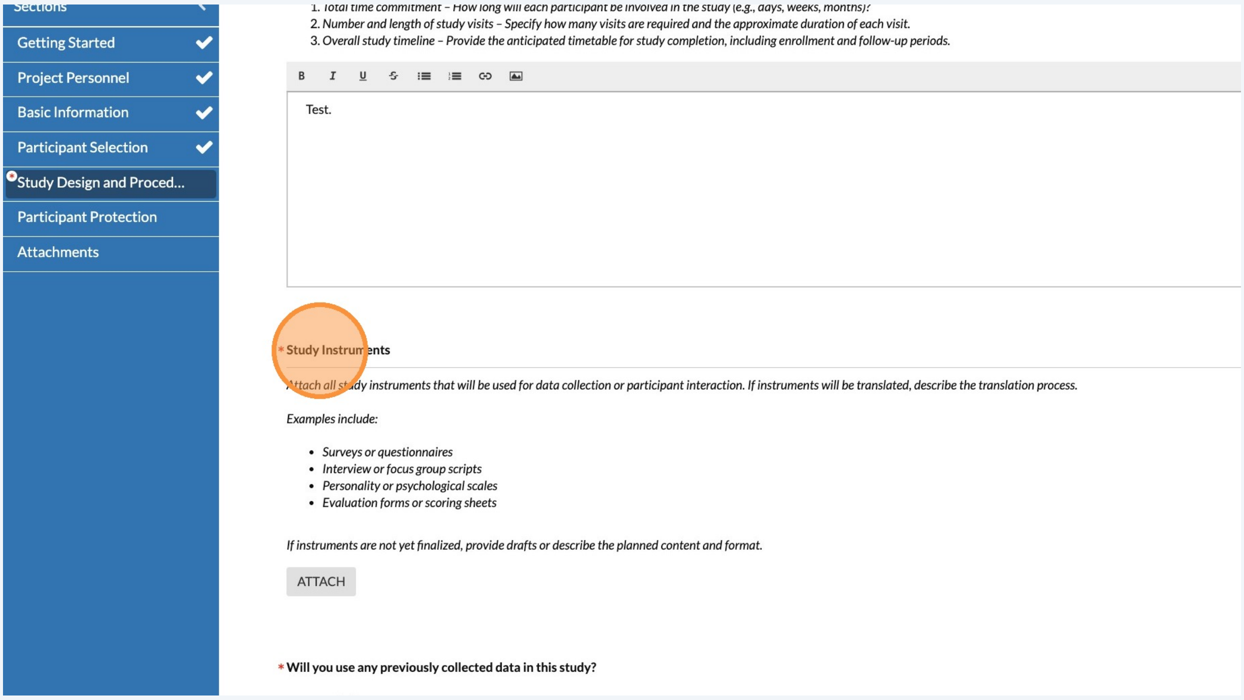
Describe the duration of participation for each subject.



59 Scroll down to the **"Study Instruments"** section.

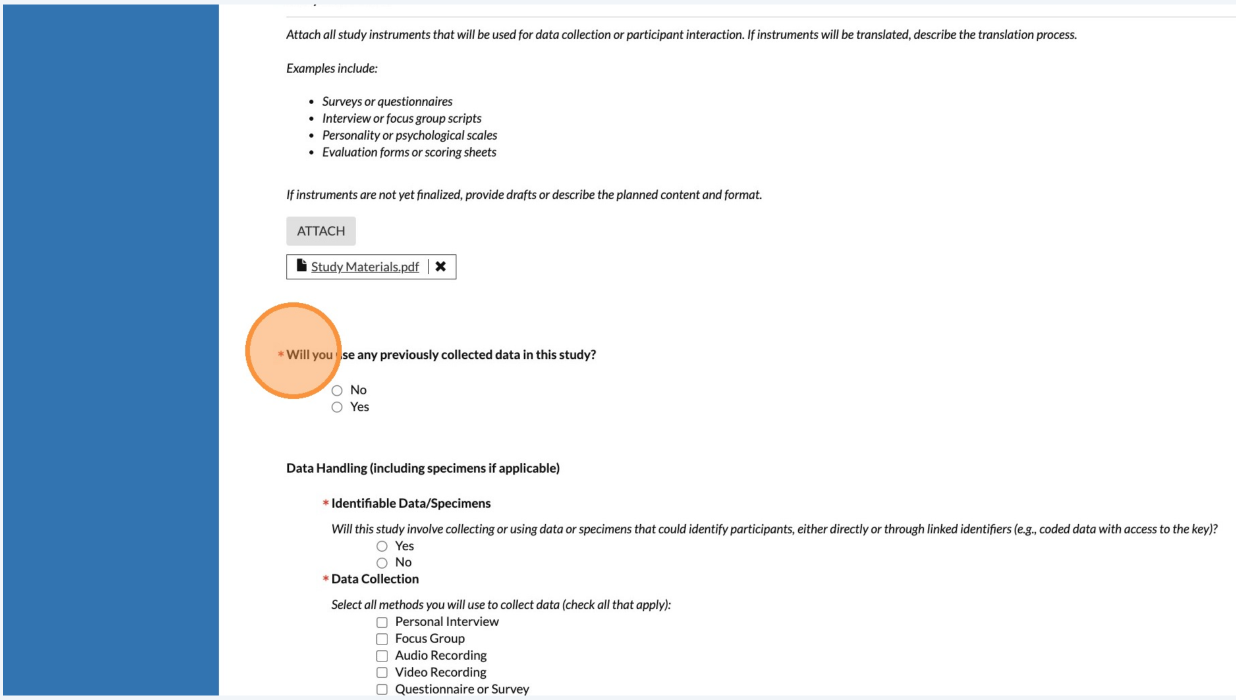
This section asks you to attach all study instruments.

Select **"Study Instruments Attach"** to attach all study instruments.



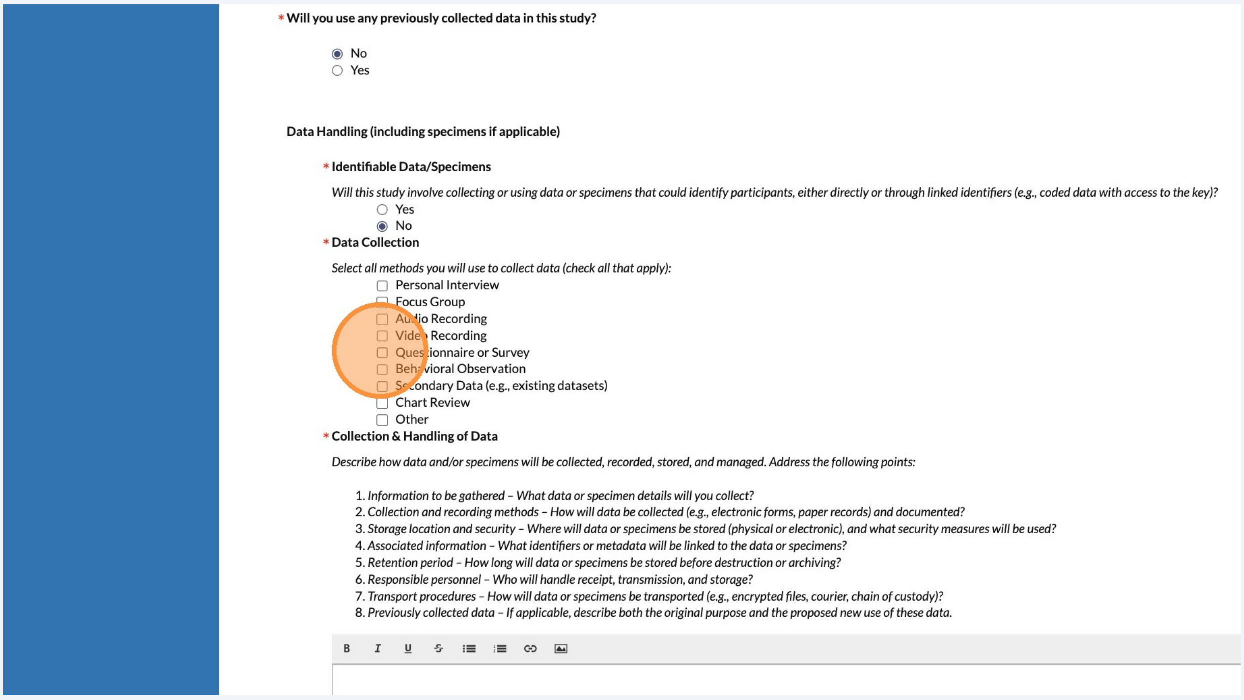
60 The next question asks if you plan to use previously collected data.

Select an item.



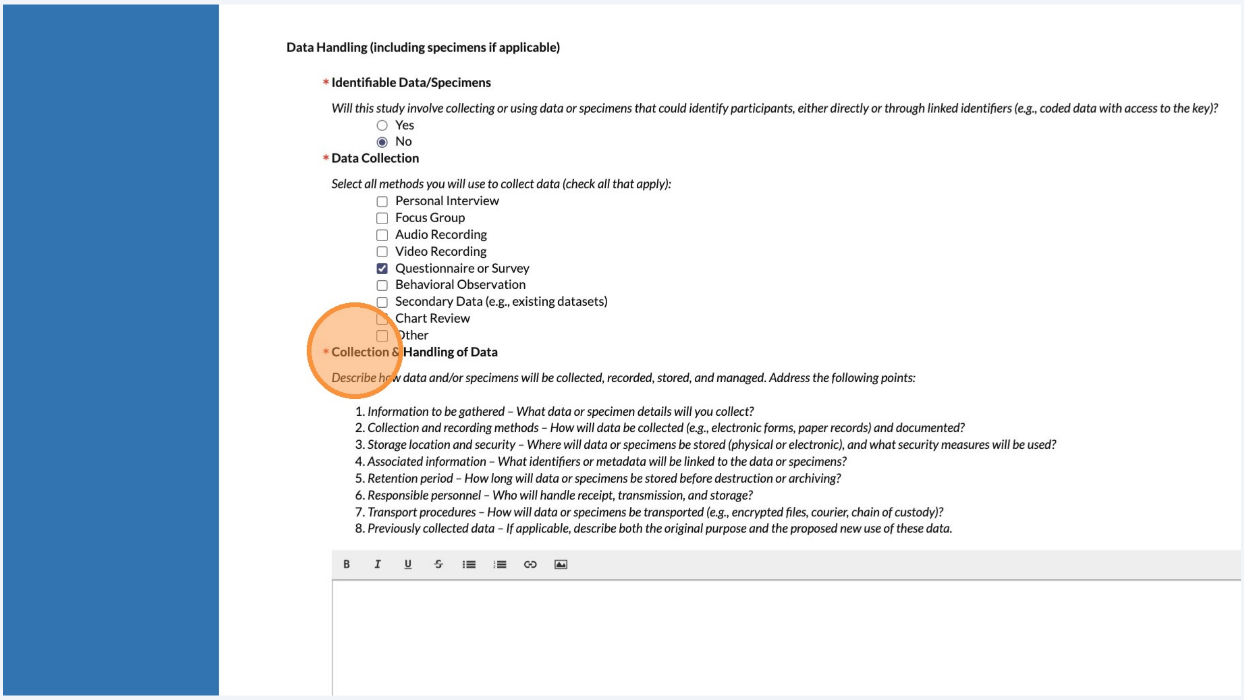
61 Next, navigate to the **"Data Handling"** section.

Select all methods that you will use to collect data.



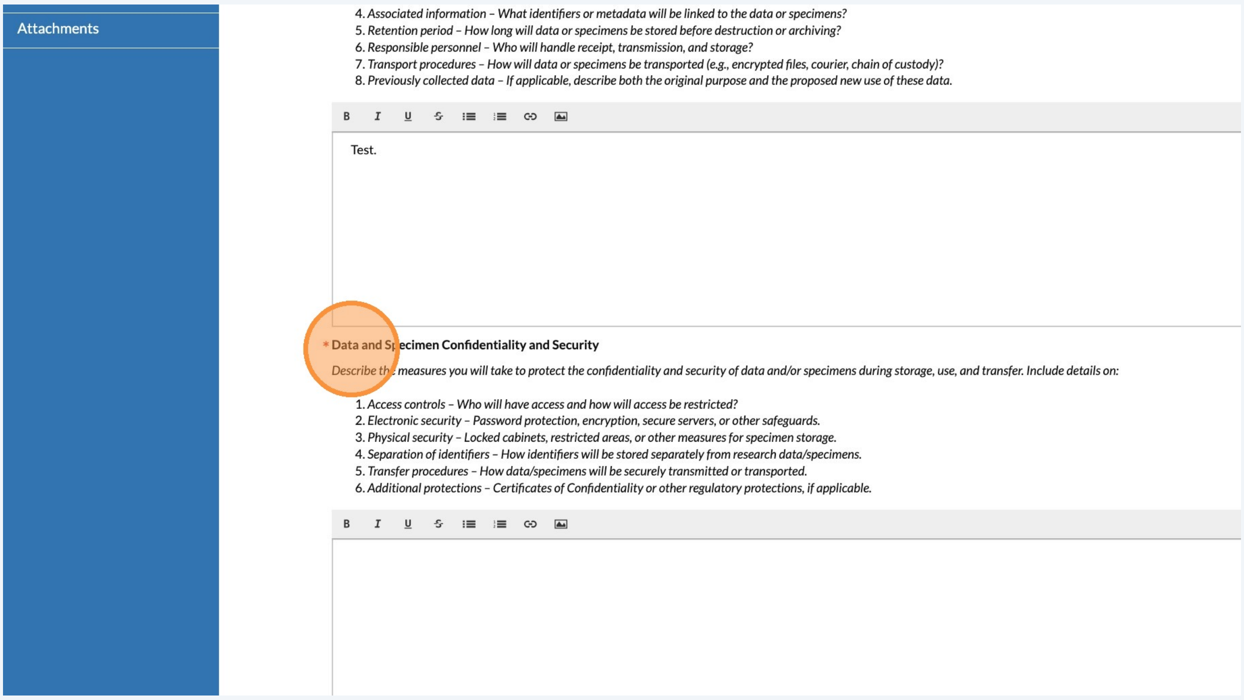
62 Next, continue to the **"Collection & Handling of Data"**

Describe how data will be collected in the text box provided.



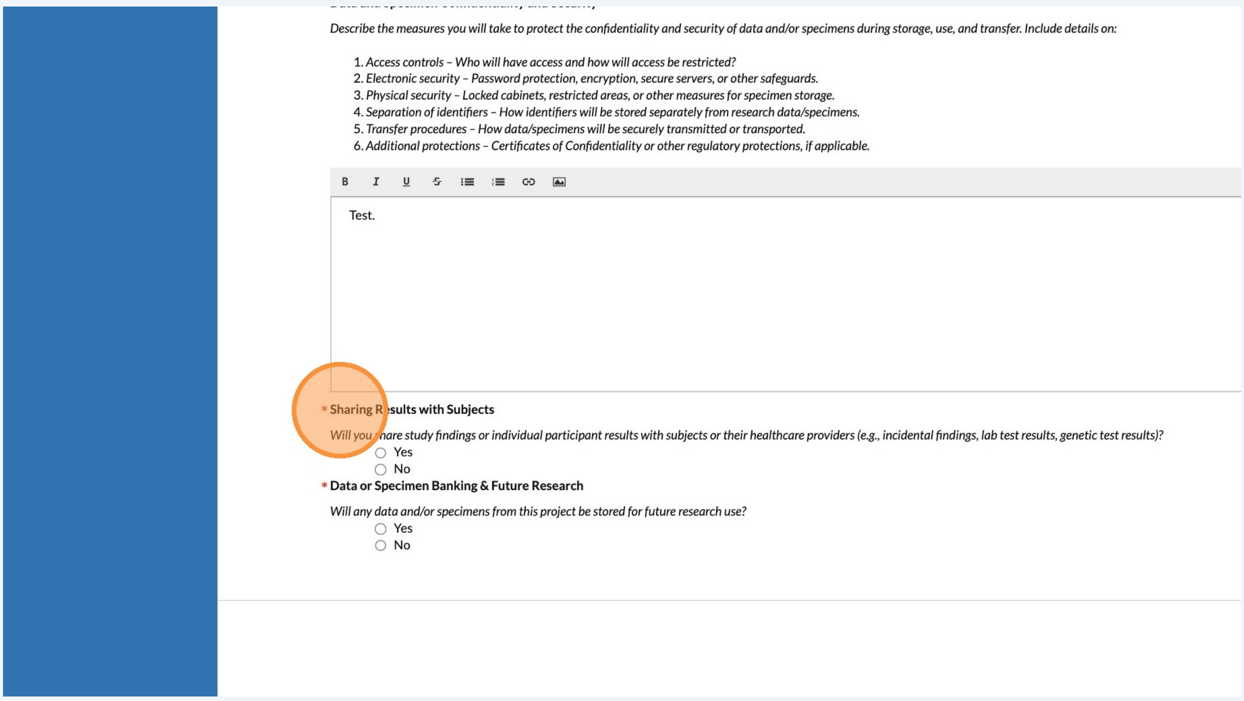
63 Click **"Data and Specimen Confidentiality and Security".**

Describe the measures you will take to protect confidentiality of various items in the text box provided.



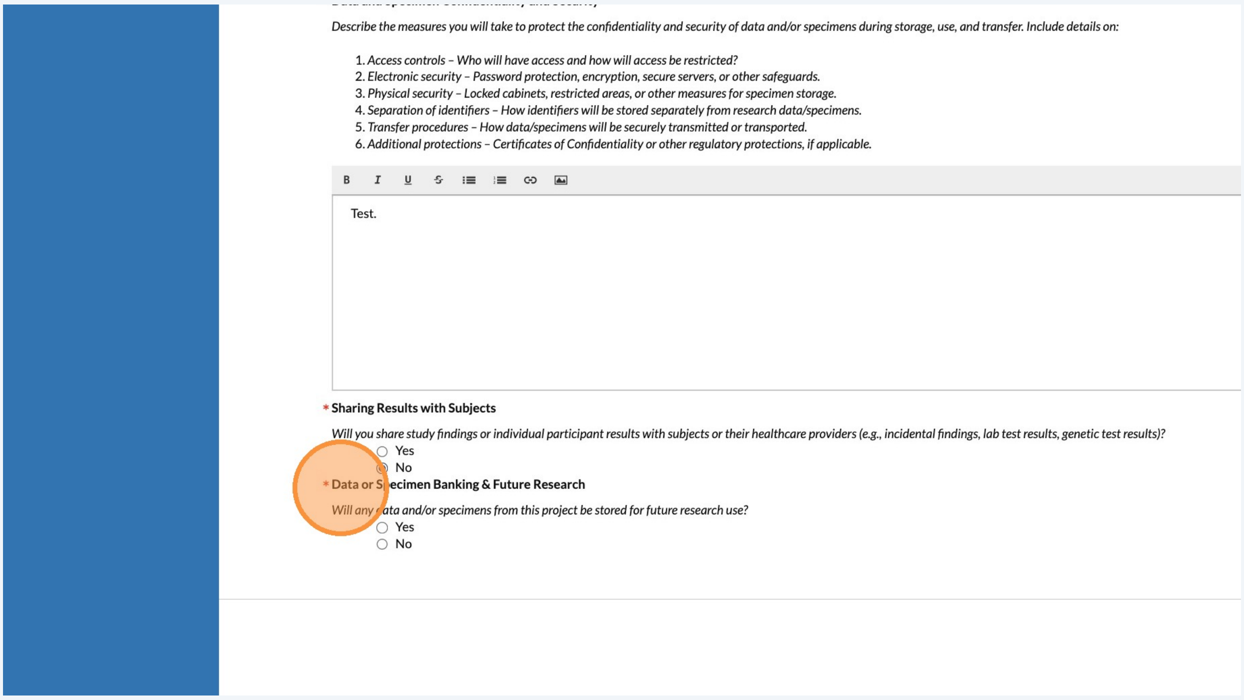
64 Navigate to **"Sharing Results with Subjects"**

Answer the required question.

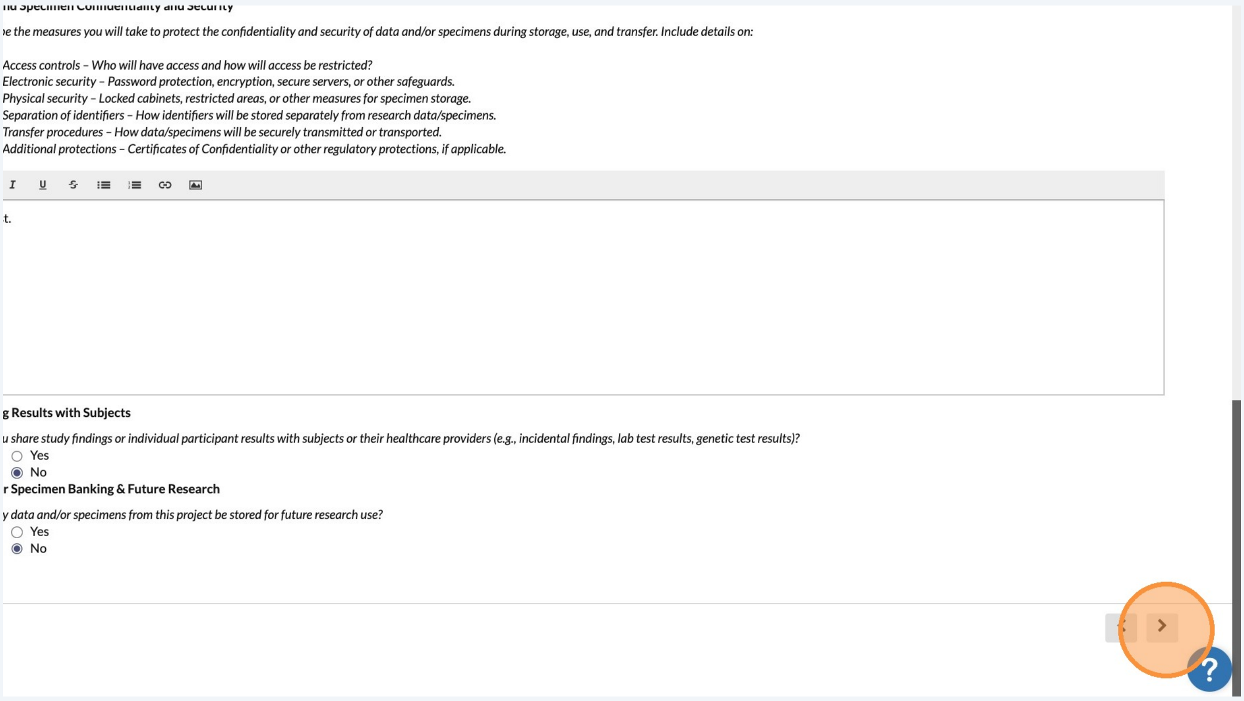


65 Finally, locate the next question under **"Data or Specimen Banking & Future Research"**

Answer the required question.

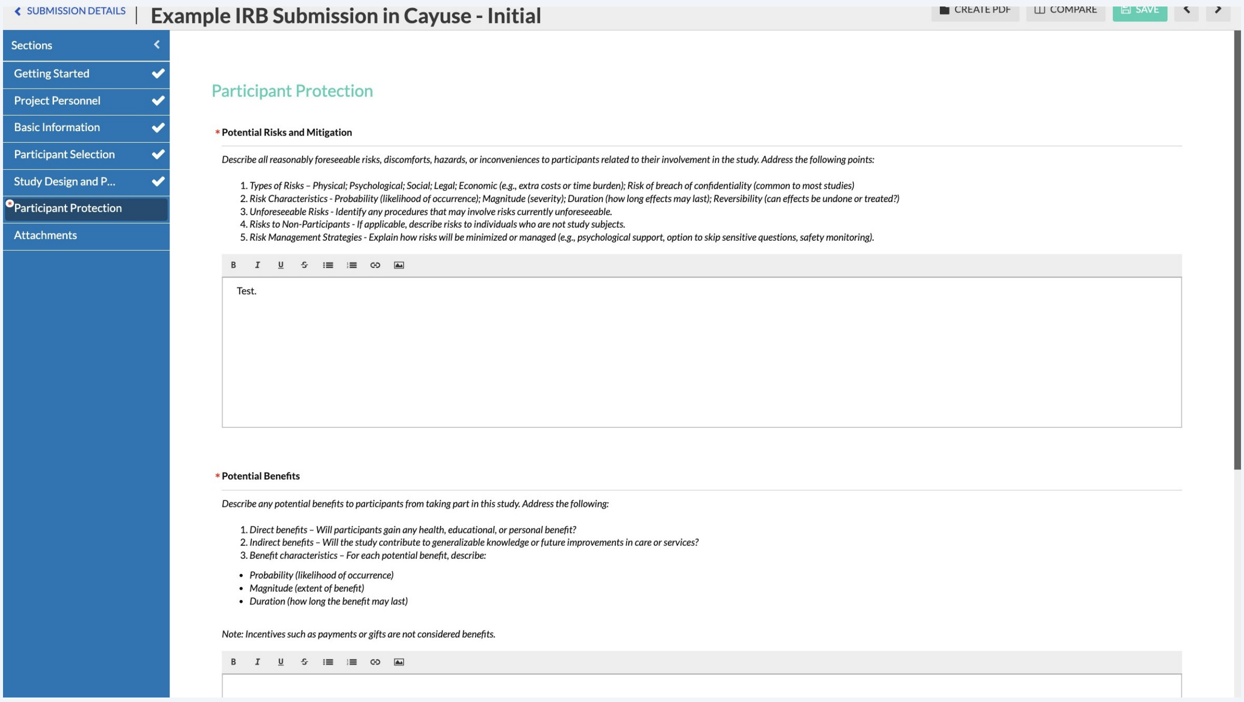


66 **Click here** to advance to the next page.

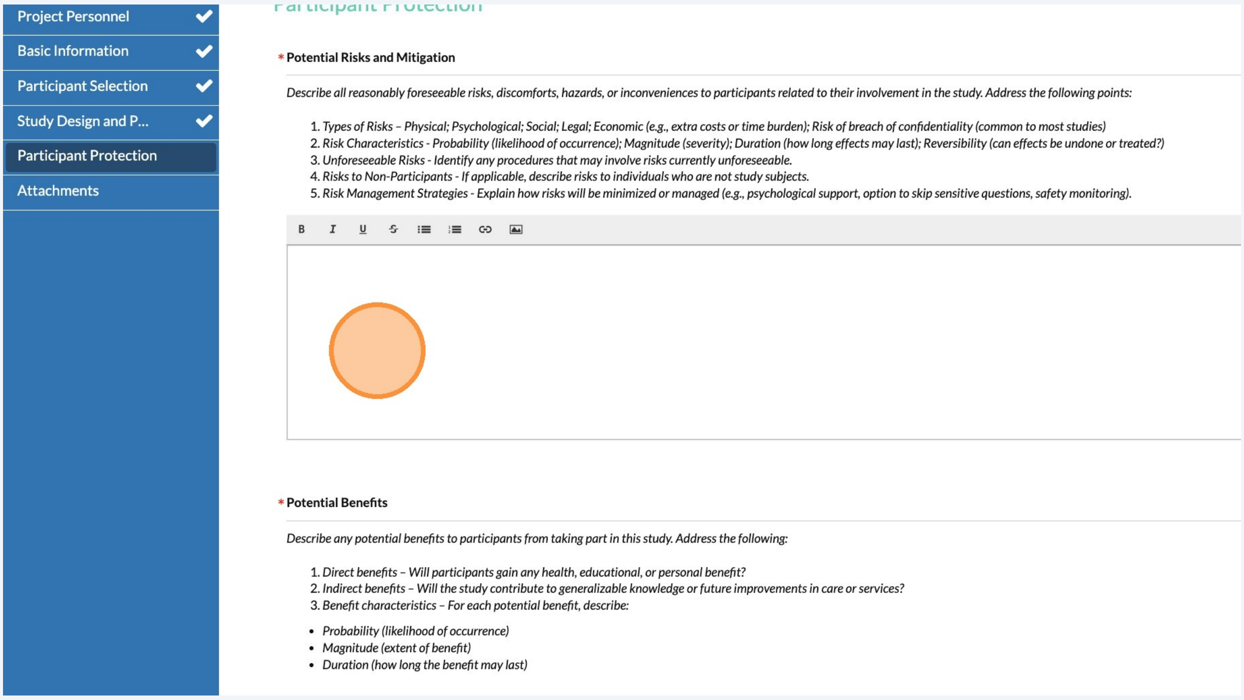


67 Reminder: The **"Study Design and Procedures"** section should now have a checkmark beside the tab if each of the required questions have been completed.

68 You have now reached the **"Participant Protection"** page.

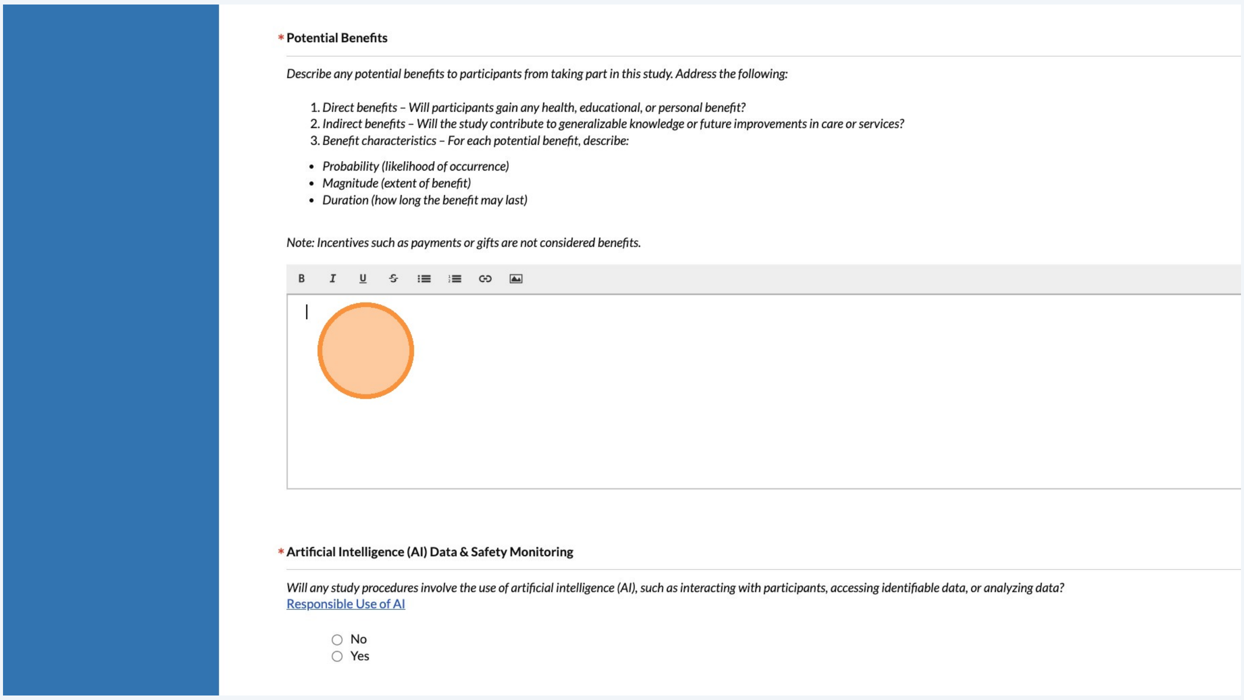


69 Under the **"Potential Risks and Mitigation"** section, describe all foreseeable risk, discomforts, hazards, etc. in the text box provided.

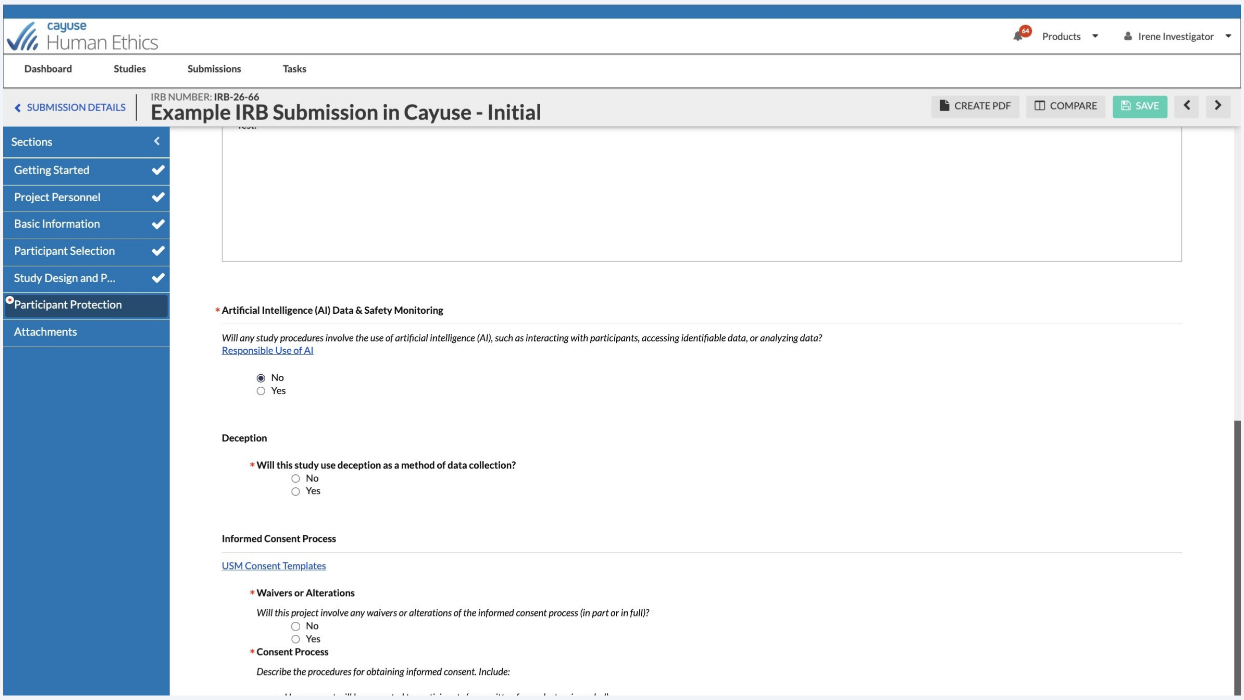


70 Scroll down to **"Potential Benefits".**

Describe any potential benefits that participants may receive.

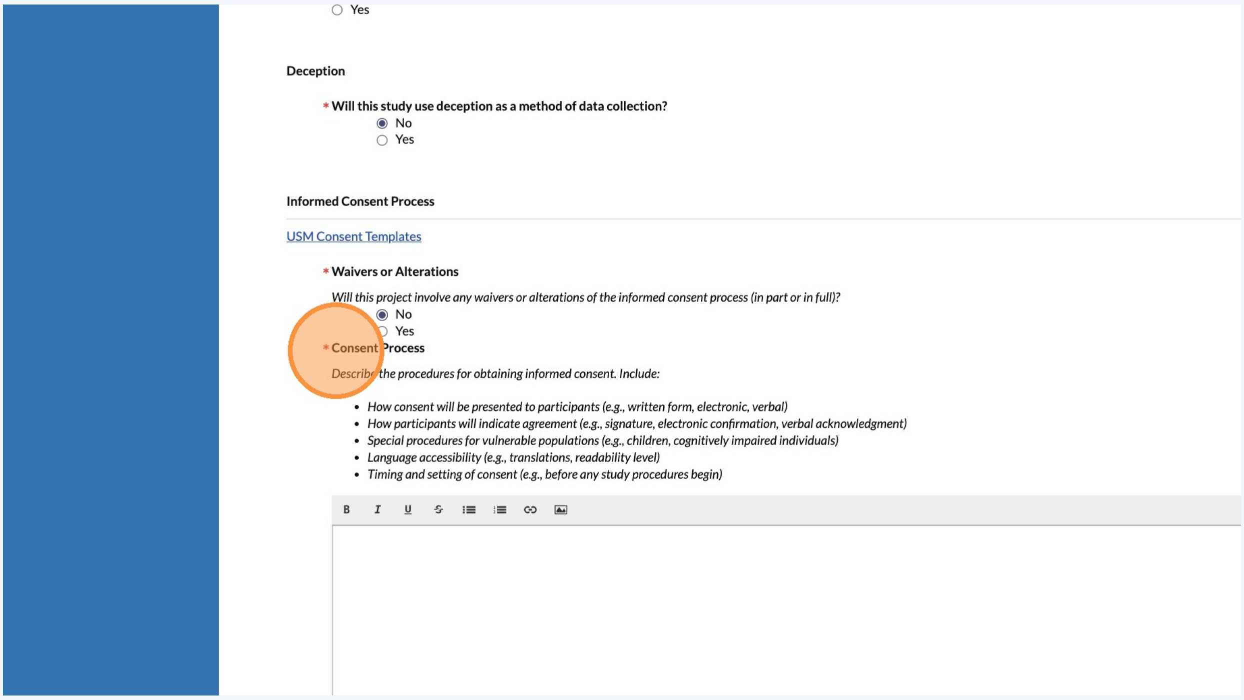


71 Next, complete the required questions under **"AI Data and Safety Monitoring"** and **"Deception".**



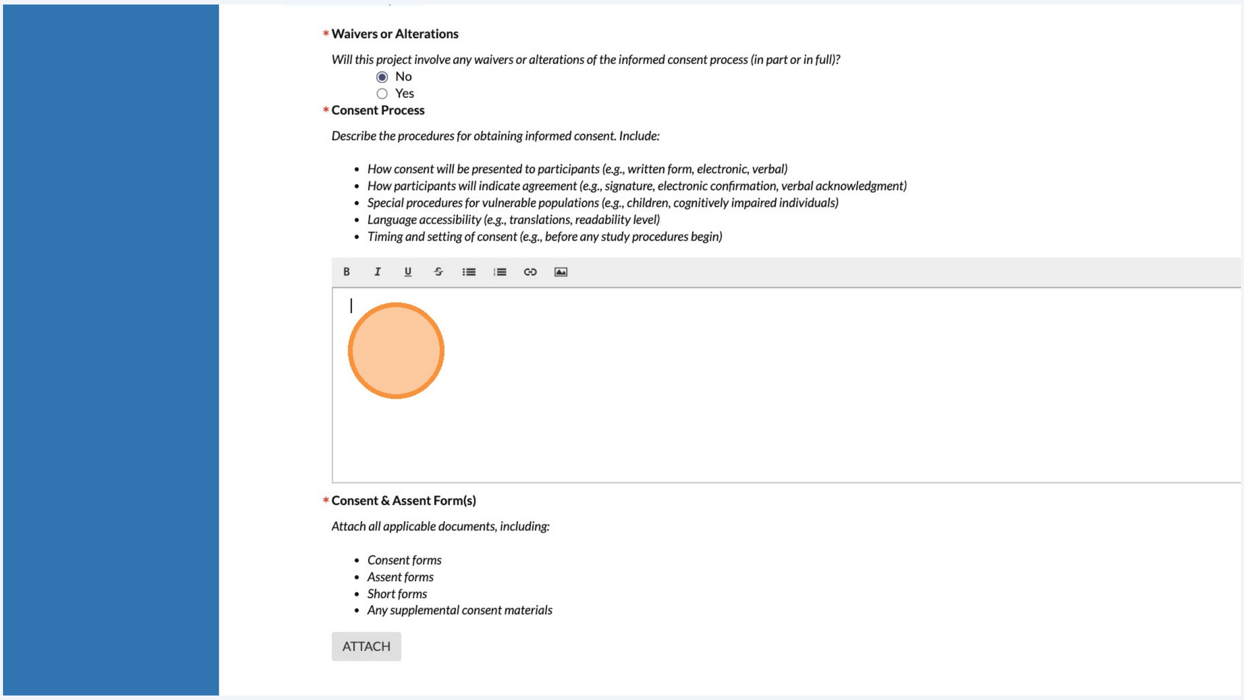
72 Next, navigate to the **"Informed Consent Process"** section.

Answer the required questions under **"Waivers or Alterations"** and **"Consent Process".**



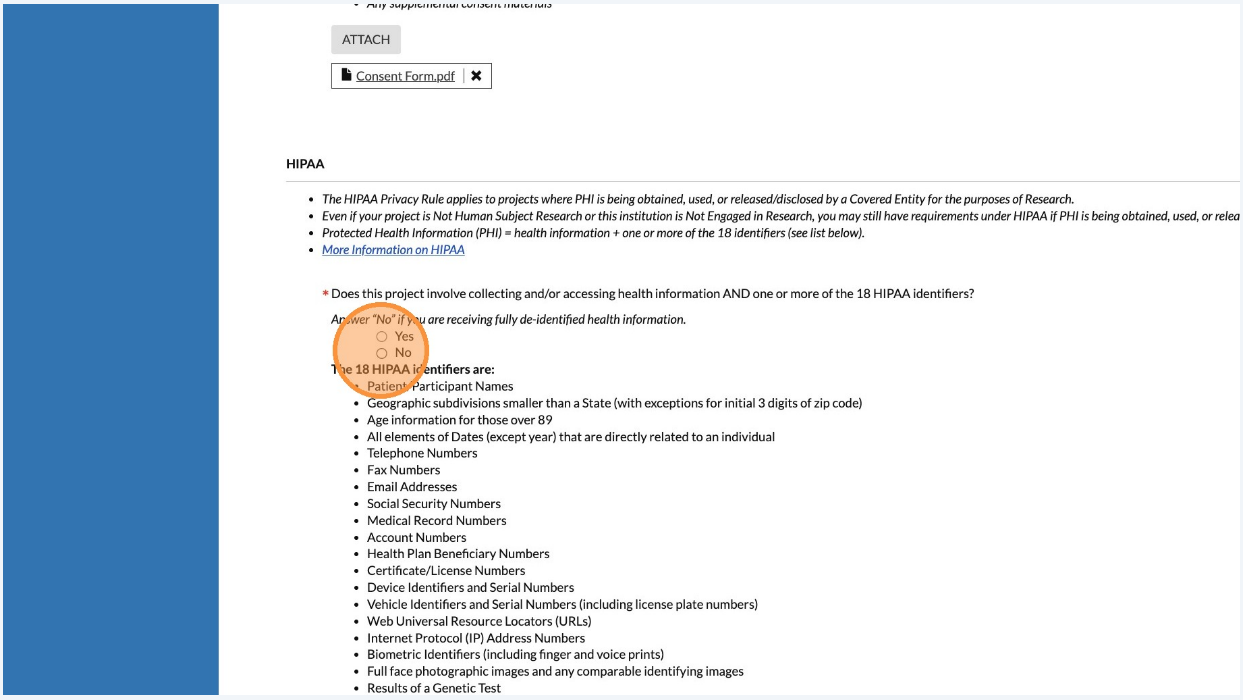
73 Next, navigate to the **"Consent and Assent Form(s)"** section.

Attach all applicable documents.

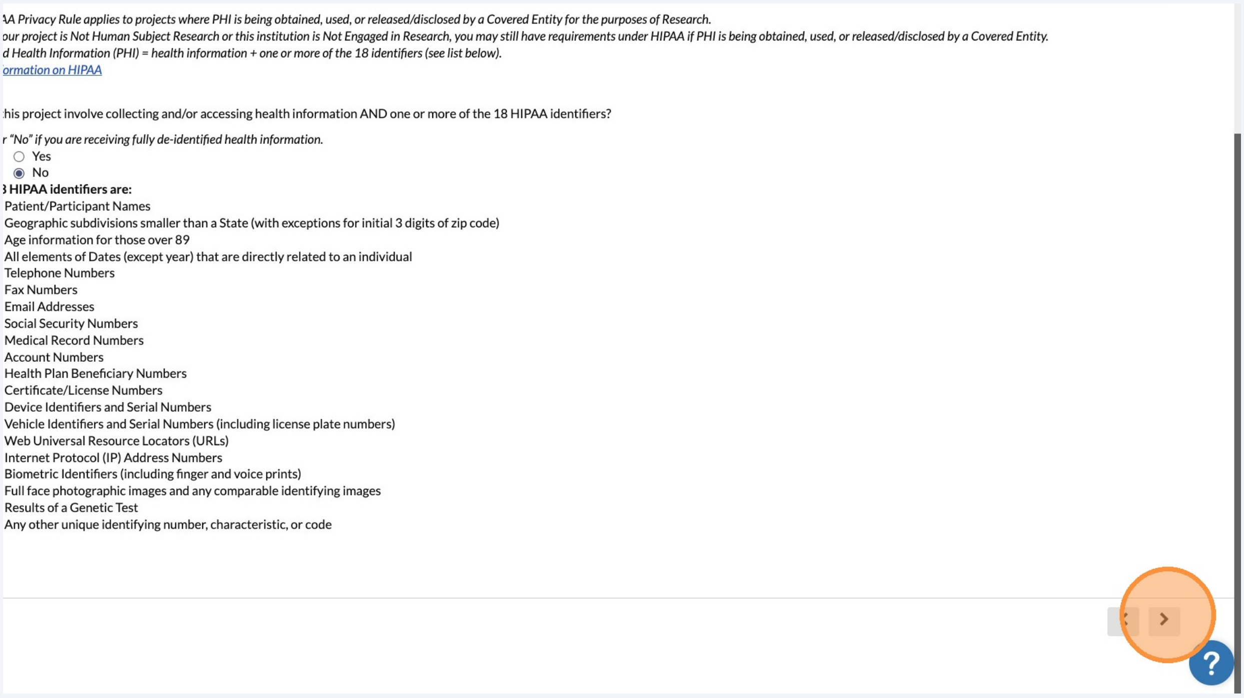


74 Finally, refer to the **"HIPAA"** section.

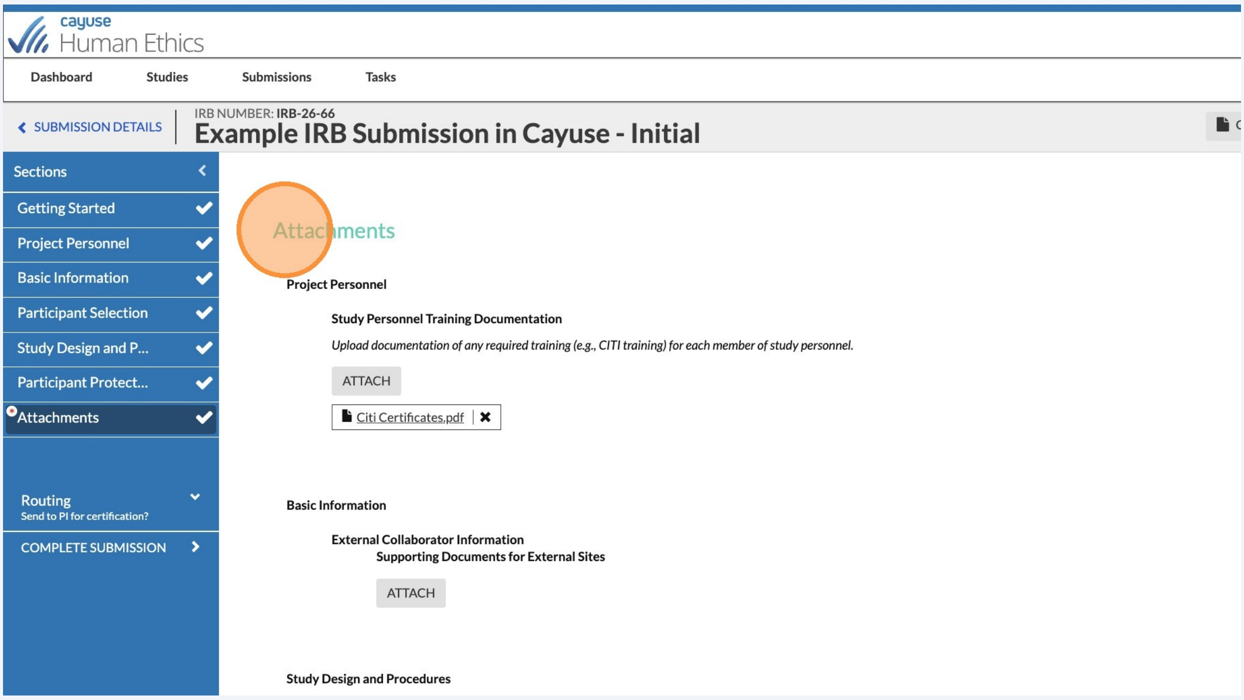
Complete the required inquiry.



75 When you are ready to proceed to the next page, **click here.**



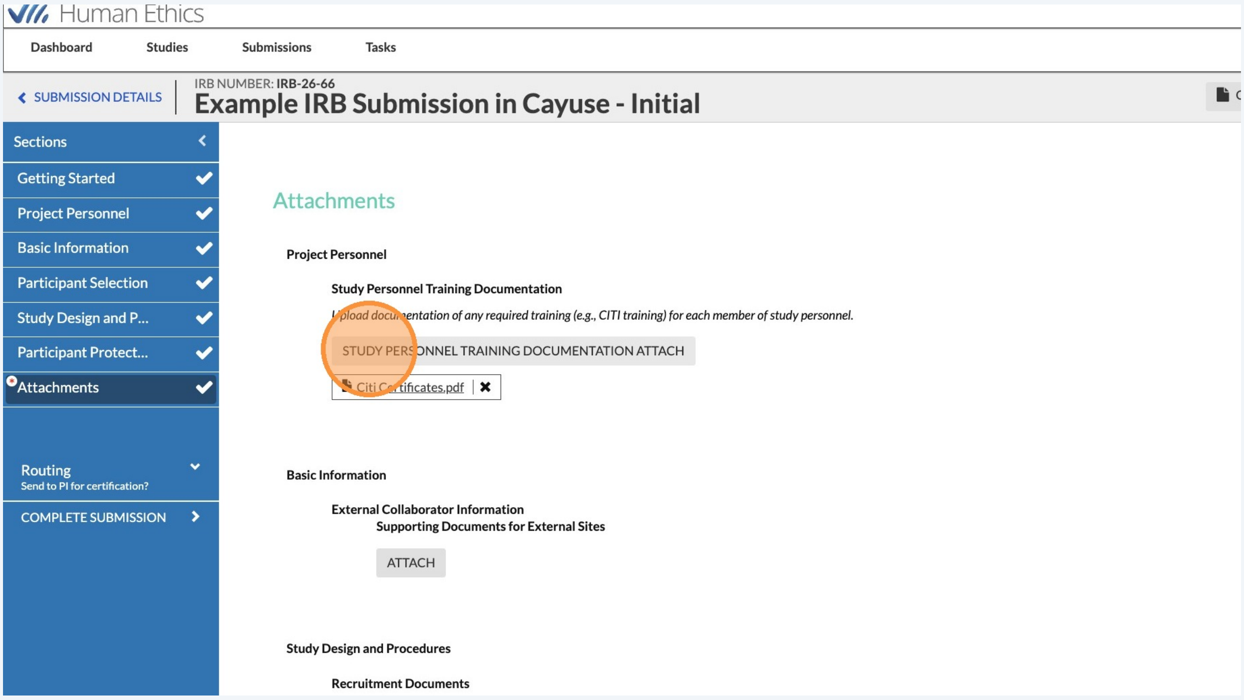
76 You have now reached the **"Attachments"** page.



77 On this page, you will see a copy of each file that you have attached to your application.

If you would like to add any more files, select **"attach".**

Each file that you add should populate on this page.



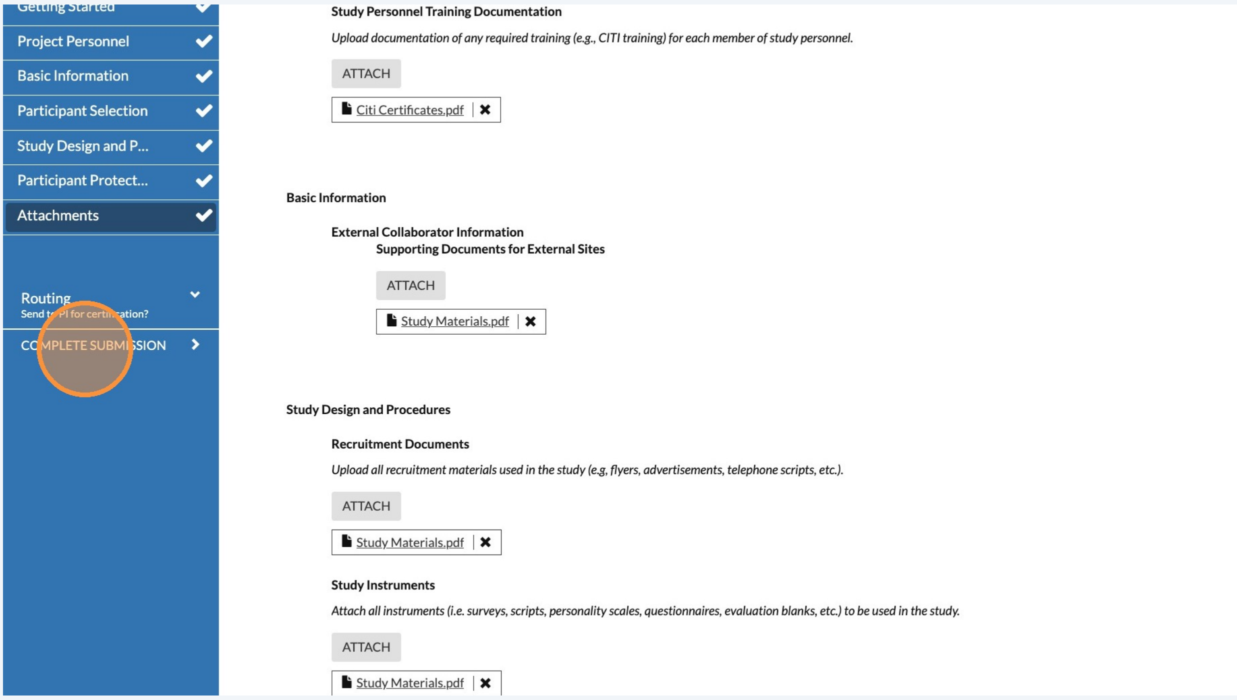
78 Note: Upon completion, The **"Attachments"** tab should have a checkmark it.

79

Direct your attention to the left hand side of this page.

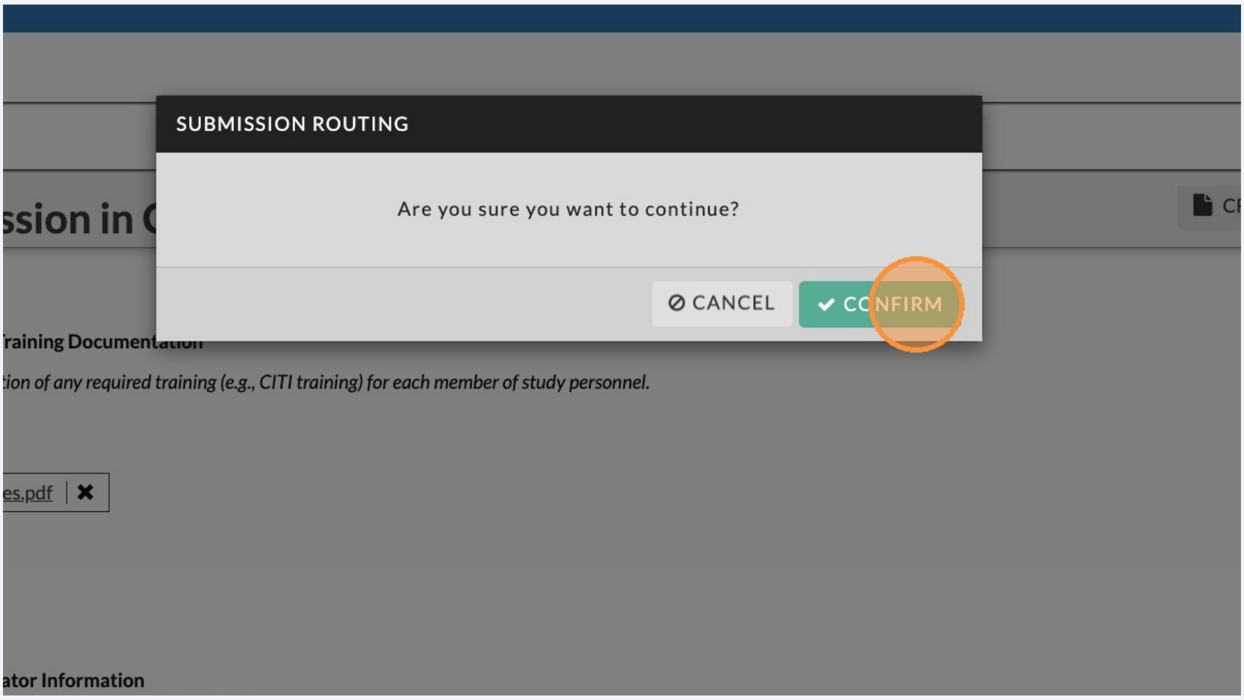
When the entire protocol has checkmarks by each tab, you'll notice that a **"Complete Submission"** button will appear at the bottom left.

To submit the protocol, select the "Complete Submission".

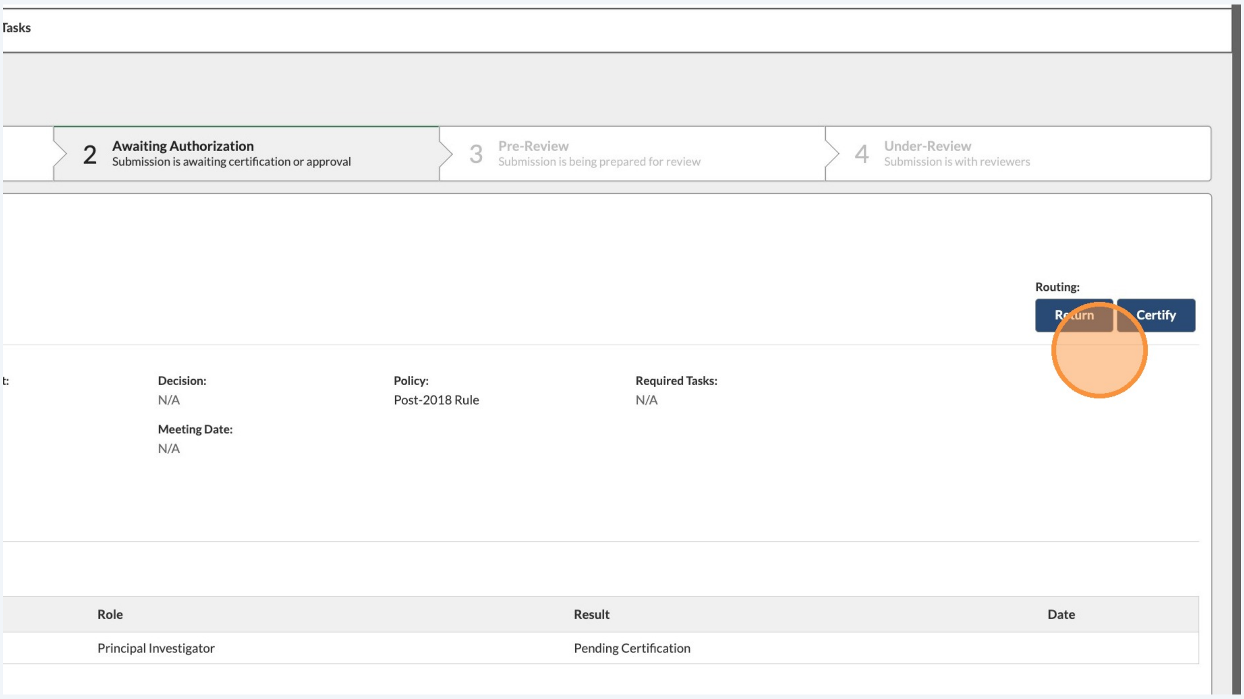


80 You will be prompted with a confirmation message.

Click **"Confirm"**

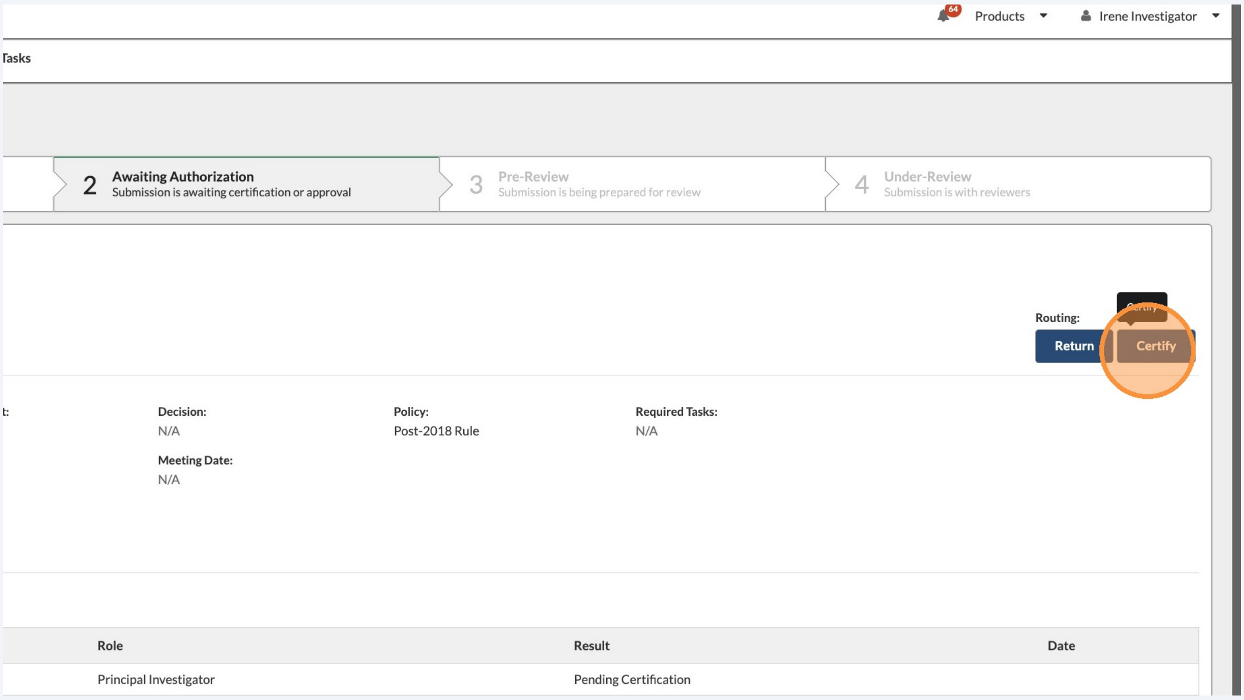


81 After you press confirm, you'll be prompted to a page where you can **"Return" or "Certify"** the protocol.



82 If you need to make further changes, select **"Return"**

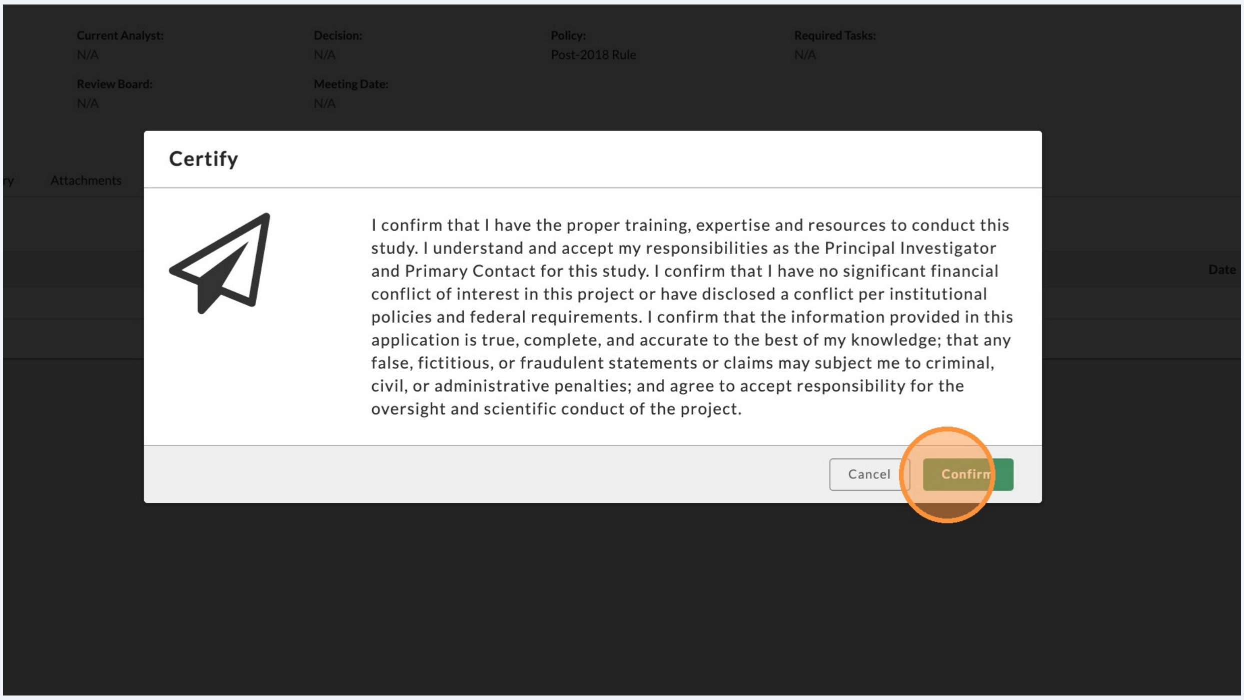
If you are ready to submit the proposal for review, Click "Certify"



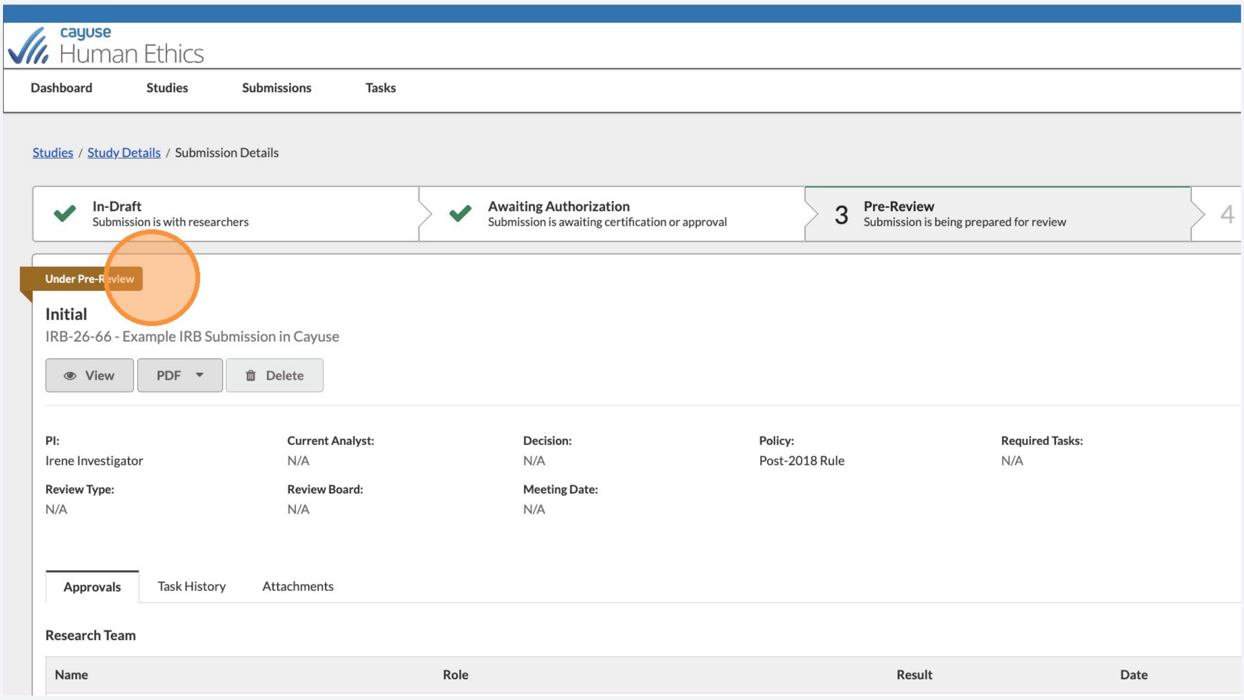
83 If you press **"Certify"** a message will populate.

Read the message.

If you can confirm that all statements are true, Click "Confirm".



84 You'll immediately notice that your document will be labeled as "Under Pre-Review"



85

Your document will also advance in the workflow to the **"Awaiting Authorization"** phase, meaning you have completed your part.

You will receive further communication from Cayuse if more action is needed from you.