Framingham Heart Study

FHS ResApp User Guide

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PI & Delegate Roles User Guide





Revision History

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Table of Contents

1.0	Welcome to FHS ResApp	4
1.1	Contact Information	4
2.0	Special Notice for users returning after March 15, 2020	5
3.0	Registration of New Users	6
4.0	Review & Submit Screen	13
5.0	Delegate Role	14
5.1	How to Become a Delegate	15
5.2	Delegate-PI Submission of an Application	16

1.0 Welcome to FHS ResApp

Welcome to the web-based Framingham Heart Study Research Application (FHS ResApp). The following application is a single form for investigators to use to submit a research proposal for review by one or more FHS review committees.

Once submitted, an administrator will forward the application to the appropriate review committee(s) based on requirements of the proposal as indicated in Part 3 of the application. FHS policies and procedures for research proposals are described under <u>Research Application</u> <u>Process and Procedures</u> and <u>Policies and Procedures</u>.

IMPORTANT:

- Projects that are seeking sponsorship **must be approved** by the FHS Executive Committee **before** the study PI submits to a sponsor for funding.
- In order to recover costs to the Framingham contract associated with servicing ancillary studies, FHS will be assessing fees for data and material distributions as described in the FHS Service Center.

1.1 Contact Information

For any questions, comments, or concerns about the Framingham Heart Study Research Application platform (FHS ResApp), please email <u>fhsapp@bu.edu</u>.

This email account is monitored by the FHS Review Committee administrators at least daily during normal business hours.

2.0 Special Notice for users returning after March 15, 2020

The <u>FHS Research Application</u> has relaunched! Below we have included instructions for returning users and for new users based on your affiliation with Boston University (BU) or institutions and organizations external to BU.

After review of the text below, if you have questions or concerns please contact the FHS ResApp Administrator at fhsapp@bu.edu.

Thank you for your consideration, The Framingham Heart Study

Boston University Users					
Current Situation	Next Steps				
Returning users	First try to login using the BU Login button.				
	Situation A: If you login with your user credentials and see your applications, you are all set.				
	Situation B: If you login with your user credentials and are taken to the registration form, then BUMC IT was unable to determine your BU profile from the data provided in previous applications				
	Please contact <u>fhsapp@bu.edu</u> with your BUID, First Name and Last Name. BUMC IT will reconcile your account (this will allow them to use BU Login going forward).				
New users	Follow instructions for the account registration process (page 2-6 of this document)				

Non-BU Users			
Current Situation	Next Steps		
Returning users	1) Navigate to the FHS Research Application Login Page.		
	2) Select the "Forget Password" link		
	3) Enter your institutional email address which was used for previous		
	applications.		
	This will initiate the process for you to create a password for your new FHS		
	ResApp account.		
New users	Follow instructions for the account registration process (page 2-6 of this		
	document)		

3.0 Registration of New Users

- 1) Navigate to <u>https://wwwapp.bumc.bu.edu/FHSresapp</u>
- 2) Click "Login" in the top right corner:



3) If you are logging in for the first time, please select "Register".

Framingham Heart Study		Login
	Login BU Login (Must use if you have one)	
	BU Login Or Custom Login (If approved by FHS) Username or Email Exerct	
	Password	
	© 2020 All Rights Reserved by Framingham Heart Study	

4) The Access Request Form screen will now appear. Please complete the form carefully and click the "Submit" button.

Special Note: On this screen user may indicate if they will be the PI to submit applications or if they intend to act in the Delegate role for a pre-existing PI user in the FHS ResApp system.

Framingham He	art Study	Login
Access Reque	st Form	
First Name*	First Name	
Last Name [*]	Last Name	
Email [*]	Email	
Will you be the applications submitted und this account?	⊧Plof © Yes © No Ier	
What is the hig academic degr earned?	jhest ree	
Are you a dele completing an application for	gate O Yes O No	
Reason for Ac Request	count Reason for access request	
	(Max 100 words)	
Submit		

5) After clicking *Submit*, you should receive a **Success!** message highlighted in green at the top of the screen. This message will read:

"Success! Your request was successfully submitted and is being reviewed. You will receive an email when you are approved."

• At this point, an email has been sent to the FHS ResApp Administrator whom will review your request for an account.

Framingham Heart St	udy	Login
Access Request Fo	rm	
Success! Your request was successful	ly submitted and is being reviewed. You will receive an email when you are approved.	
First Name [*]	Michelle	
Last Name [*]	Tester	
Email*	michelle.stpaul@gmail.com	
Reason for Account Request [*]	Completing process for Beta tester instructions	
	95 word(s) left. (Max 100 words)	
Submit		

-Take a break, check your email –

6) After an FHS Administrator has approved your account request you will receive an email with notification of your approval (screenshot below).

7a) **FOR BU USERS:** Select "Login to FHS" within the email to setup your FHS ResApp account! You many now skip steps 7b and 7c.

For NON-BU USERS, see items 7b and 7c on the next page.



7b) FOR NON-BU USERS: Select "Login to FHS" within the email to setup your FHS ResApp account!

fhsapp@bu.edu to me ▼	5:34 PM (0 minutes ago)	☆	*	:
Framingham Heart Study				
Thank you for requesting access Framingham Heart Study Rese Application	s to the earch			
Your request for access has been approved. Please for create login account	llow the link to			
Create Login Account				
www.framinghamheartstudy.org				

7c) FOR NON-BU USERS: You will be brought to the "Create account login" screen. Please create a password and click 'Save'.

Framingham Hear	t Study	Login
Create account le	ogin	
	michelle.stpaul@gmail.com	
	Password	
	Confirm Password	
	Save	
	© 2020 All Rights Reserved by Framingham Heart S	tudy
https://wwwapp.bumc.bu.edu/FHSresapp		

8) You will return to the Login screen. Select "BU Login" if you created an account with your BU credentials, otherwise login in under "Custom Login"

Framingham Heart Study Administr	ation • Applications • My Applications Agendas •	Welcome, Michelle St. Paul! Logout
Impersonate PI: Search by First/Last starts Go		
	Login BU Login (Must use if you have one) BU Login Custom Login (If approved by FHS) Username or Email Password Forgot	
	Login	
	© 2020 All Rights Reserved by Framingham Heart Study	

- 9) You will be brought to the "My Applications" screen.
 - Under "List of Applications" you will see a message that you have "No Applications on File"
 - Please select "New Application" to start a new application.

	Framingham Heart Study My Applications Welcome, Heart Study Framingham! Logout				
66	My Dashboard	List of Applications			
٩	Change Password	No Applications On File			
		New Application			
		© 2020 All Rights Reserved by Framingham Heart Study			

4.0 Review & Submit Screen

Framingham Heart Study	/ My Applica	ations Delegates		Christopher Dorney 👻 🕞 Logout
1 Contact information	Review a	nd Submit Application		
2 Proposal Title & Description	Section	Title	Complete?	Missing data
	1	Contact information		PI Contact Into Early-Stage Investigator
3 Proposal Review Process	2	Proposal Title & Description	×	
	3	Proposal Review Process General Research Proposal		Section not started
General Research Proposal	5a	Executive Review		Section not started
5a Executive Review	5b	Lab Review		Assay is required Investigator Responses required
	5c	DNA Review		Section not started
5b Lab Review	-	Attachments	2	
	E S	Study PI agrees to follow all Policies a posted here and reviewed and updated	nd Procedures set forth d regularly by FHS lead	h by the Framingham Heart Study. These policies are dership.
5c DNA Review	DNA Review Study PI agrees to entirely support the ancillary program's costs involved in conducting their study with the Framingham Heart Study. Including, but not limited to, subcontracts, FHS Service Center Fees, Research Center rent costs, etc.			sts involved in conducting their study with the ntracts, FHS Service Center Fees, Research Center rent
Attachments	S S	Study PI confirms that all named Co-Investigators have been made aware of their appointment in the Co-Investigators role for this study.		
	E S	Study PI agrees to cite the FHS Core (nave funded their research activities in	Contract (NHLBI award publications that resul	# 75N92019D00031) and any FHS grant numbers that t from such work.
Review & Submit Study PI agrees to return data and materials in accordance to FHS Ancillary Study Policy.			o FHS Ancillary Study Policy.	
I				Not ready for submission

The final screen of each application has two purposes:

- 1) The text within the **GREY BOX** highlight the form items that are missing and must be completed before the study PI may submit the application.
 - a. The Missing data column indicates the item missing.
 - b. The Title column links to the specific section of the application in which the missing data should be provided by the PI.
- 2) The bottom of the page lists several statements that the study PI must review and check each box to acknowledge and agree.

The PI must check all boxes in order to Submit the application.

Once all matters on this screen have been resolved the blue "Not ready for submission" button will now say "Submit". Click the "Submit" button to submit the application.

5.0 Delegate Role

As of April 23, 2020, the FHS ResApp allows PIs to designate other account holders with the *Delegate* role.

A delegate is a person whom can fill out a PI's application on their behalf.

Please note that:

- <u>A delegate cannot answer PI acknowledgements nor submit the application on your behalf.</u> But can fill out all other sections.
- A delegate must have an account with a "Delegate" role assigned by the FHS administrator.
- Delegates must specify they need a delegate role when registering for an account (see section 3.0 of this guide)
- For PI users: A delegate will appear in the "Select Delegate" list below only if not already selected to act on your behalf.

5.1 How to Become a Delegate

5.1.1. FOR NEW USERS:

STEP 1: Create an account and request the *Delegate* role.

- The new user must follow registration instructions included in Section 3.0 of this guide and within the Access Request Form the new user must select "Yes" as an answer to the question "Are you a delegate completing an application for a PI?"
- After the above is completed and the new users' account has been approved, the PI must select the user as their delegate.

STEP 2: PIs select the user as their *Delegate*

- The PI must navigate to the FHS ResApp and Log in.
 - At the top menu of the FHS ResApp the PI must select the menu item *Delegates*. The Delegate Management screen will now appear (screenshot below)

Framingham Heart Study My Applications	Delegates		Christopher Dorney	- C+ Logout
A delegate is a person who can fill out your application on your behalf. A delegate cannot answer PI acknowledgements nor submit the A delegate must have an account with a "Delegate" role assigne Delegates must specify they need a delegate role when register A delecate will appear in the "Select Delecate" list below only if	<u>Please note</u> that application on y to by the FHS av ing for an account not already sele	t: rour behalf. But can fill out all other sections. dministrator. nt. cted to act on vour behalf.		
Select Delegate:				
Search delegate by Name				

- In the "Select Delegate:" text field, please begin typing the delegate's name
- A dropdown list with users who are currently approved in the delegate will appear, please select your intended delegate from this dropdown list
- Once selected, this user's name should now appear on the screen under the list "Delegates you selected to act on your behalf" (screenshot below)

Delegates	you selected to act on your behalf	
	Name	Email
â	Delegate Name	delegate@email.com
Select Delega	jate: e Name	

5.1.2. FOR EXISTING USERS:

Please contact <u>fhsapp@bu.edu</u>, copy your Pl to the email correspondence, and request to be added as their delegate in the FHS Res App system. An FHS ResApp administrator will reviewer you request email and in a reply indicate if and when your request is approved.

5.2 Delegate-PI Submission of an Application

 After completing steps to create a delegate account and complete PI selection of a delegate (previous sections of this guide), the delegate may now start FHS research applications on behalf of their PI user. When a Delegate navigate to the FHS ResApp system and logs in, they may be required to specify the PI for whom they perform as proxy (see the screenshot below).



Welcome to the web based Framingham Heart Study Research Application. The following application is a single form for investigators to use to submit a research proposal for review by one or more FHS review committees.

- 2) The delegate may enter and save all content in the application form up until the *Review & Submit* screen of the application. On the *Review & Submit* screen delegates will see a red error message reminding them that Only the PI of the application can submit the form (screenshot on next page).
 - a. Delegates should now notify their PI that the application is ready for review and submission.
- 3) Thereafter the PI must log on to the FHS ResApp, find the application under the *My Applications* menu item and navigate to the Review & Submit screen to complete and submit the application (see Section 4.0 of this guide).

Contact information	Review and	Submit Application				
Proposal Title & Description	Important! \$	SUBMIT ERROR: Only the PI can submit an a	application			
	Section	Title	Complete?	Missing data		
Proposal Review Process	1	Contact information				
	2	Proposal Title & Description	1			
General Research Proposal	3	Proposal Review Process	1			
	4	General Research Proposal	2			
Executive Review	5a	Executive Review	1			
	5b	Lab Review	1			
	5c	DNA Review	2			
Lab Review	4	Attachments	v			
	SUBMIT	ERROR: Only the PI can submit an application	on			
DNA Review	Stud pos	 Study PI agrees to follow all Policies and Procedures set forth by the Framingham Heart Study. These policies are posted here and reviewed and updated regularly by FHS leadership. Study PI agrees to entirely support the ancillary program's costs involved in conducting their study with the Framingham Heart Study. Including, but not limited to, subcontracts, FHS Service Center Fees, Research Center rent costs, etc. 				
Attachments	Stud Frai cost					
	Stud role	Study PI confirms that all named Co-Investigators have been made aware of their appointment in the Co-Investigators role for this study.				
Review & Submit	t Study PI agrees to cite the FHS Core Contract (NHLBI award# 75N92019D00031) and any FHS grant numbers that have funded their research activities in publications that result from such work.					
	Stud	Study PI agrees to return data and materials in accordance to FHS Ancillary Study Policy.				
	Important! S	SUBMIT ERROR: Only the PI can submit an a	application	Save & Submit		