MacEwan UNIVERSITY | OFFICE OF RESEARCH SERVICES

Getting Started with WorkTribe

Table of Contents

1. Overview
2. Accessing WorkTribe
    b. MacEwan staff and faculty
    c. Students and external researchers
    d. Navigating your homepage
        i. Home
        ii. Messages
        iii. Profiles
        iv. Ethics
        v. Help
3. Submitting a New Application
    a. Creating an ethics application
    b. Selecting participant population
    c. Choosing the correct application type
    d. Completing the form
    e. Uploading documents
    f. Submitting your application
    g. Tracking review progress
4. Addressing Reviewer Comments
5. Accessing Your Approval Letter
6. Amending your approved project
7. Submitting Progress Reports
    a. Renewal
    b. Closure
    c. Adverse Events

1. Overview

MacEwan University has procured and implemented a new ethics management system called WorkTribe to replace ROMEO, which will be sunsetting in 2027.

Active files that were initially approved in ROMEO have been migrated to WorkTribe by the Office of Research Services. Once notified, you can continue to manage your approved ethics applications within WorkTribe, including sharing amendments and requesting extensions. After December 1st, all new studies should be submitted using WorkTribe, not ROMEO.

2. Accessing WorkTribe

MacEwan Faculty and Staff

All MacEwan researchers can access the login screen on the Human or Animal Research Ethics websites. The link to login can be found here.

Enter your MacEwan username and password.

Students and External Researchers

If you need to have students or external researchers or added to the project (meaning they require access to update and revise this application), you must submit a Person of Interest Account Request Form (POI) in the forms cabinet. Choose the "Non-affiliated Student Research Assistant/Research Personnel" option for POI type. You will need to obtain the following information from the person for whom you are requesting access in order to submit the form:

1. First Name, Last Name
2. MacEwan ID #, if applicable (If they have previously been affiliated/or are currently affiliated with MacEwan University as a student, employee, or person of interest, they will have been assigned a 7-digit MacEwan ID #)
3. Date of birth (YYYY/MM/DD)
4. Cell phone Number
5. A signed copy of the Confidentiality Agreement

You will receive an email update once the POI has been created.

Note that you will need to use the entire email address to log in as a POI: [userID]@macewan.ca

a. Navigating your homepage

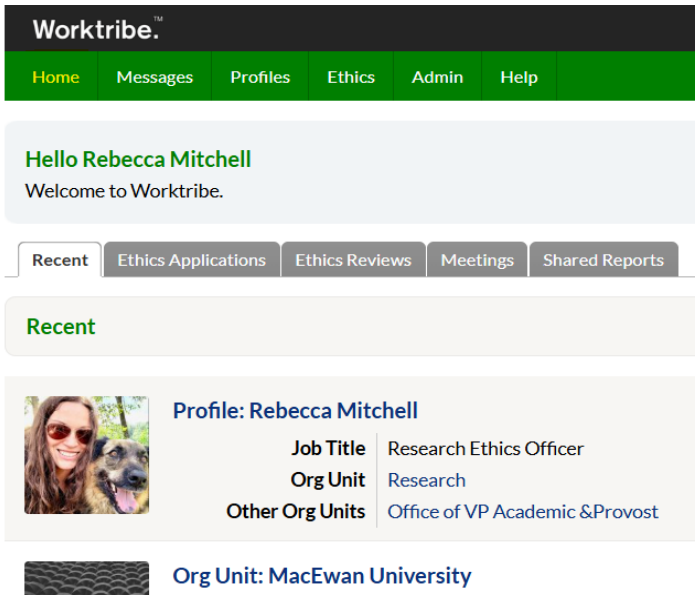
The WorkTribe landing page has a variety of tabs and fields all assigned for specific functions. Understanding how the tabs and functions work will help you move through the ethics review process more easily.

After logging in the WorkTribe homepage will appear with five tabs at the top of the page in the blue bar: Home, Messages, Profiles, Ethics, Help

i. Home

The home tab is located at the top left-hand side of the landing page. Clicking it will return you to the homepage.

A list of your recent activities will be displayed:



<u>Tabs in Home:</u>

Recent: shows a list of recently accessed applications & other activities

Ethics Applications: A summary of all your ethics applications, along with their risk assessment and review status.

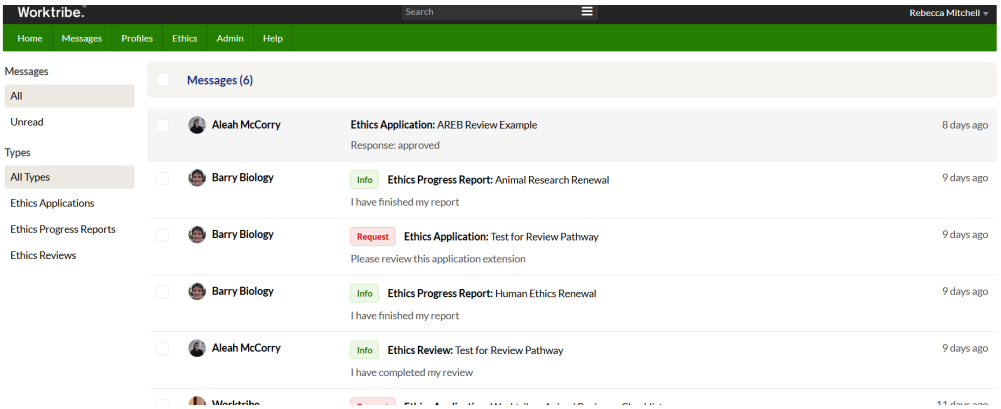
Ethics Reviews: If you are on an ethics board (REB, AREB) and have been assigned applications to review, they can be found under this tab.

Meetings: If you have been invited to attend a research ethics board meeting, either as a committee member or as a guest, meeting details and materials will be provided here.

Shared Reports: A summary of the reports your projects have been pulled into.

ii. Messages

When you are tagged in comments, have a change in study status, or if a decision has been made about your study, you will have a red indicator beside the Messages tab, showing how many new notifications are awaiting your attention.



You will also receive an email notification with a link to the relevant file.

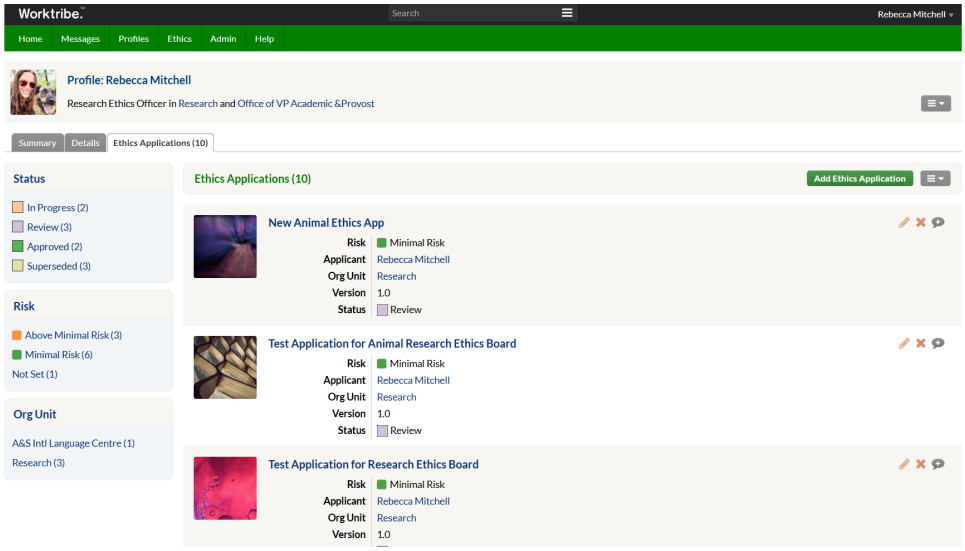
iii. Profiles

All WorkTribe users will have a corresponding Profile in which your basic information is stored. You can find your profile by navigating to 'Profiles' -> 'My Profile'.

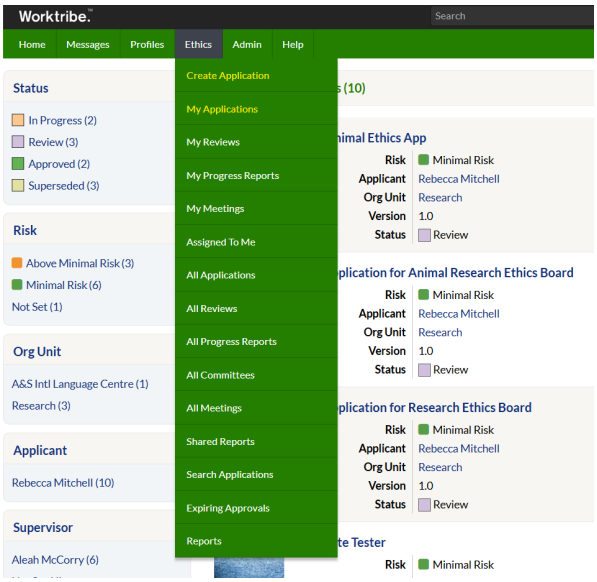
Your Profile will have three tabs:
Summary – summarizes your personal information, with the option to change your profile photo

Details – you can update your profile with any information you would like to include

Ethics Applications – displays all the applications where you are the primary applicant, along with their review status and risk levels.



iv. Ethics



The Ethics tab is used to manage new and ongoing ethics applications.

Most importantly:

Create Applications - starts a new ethics application. If you click here, you will be prompted to input initial details about your study, and will then be taken to the ethics application form.

My Applications – all your ethics applications can be found here, including approved applications

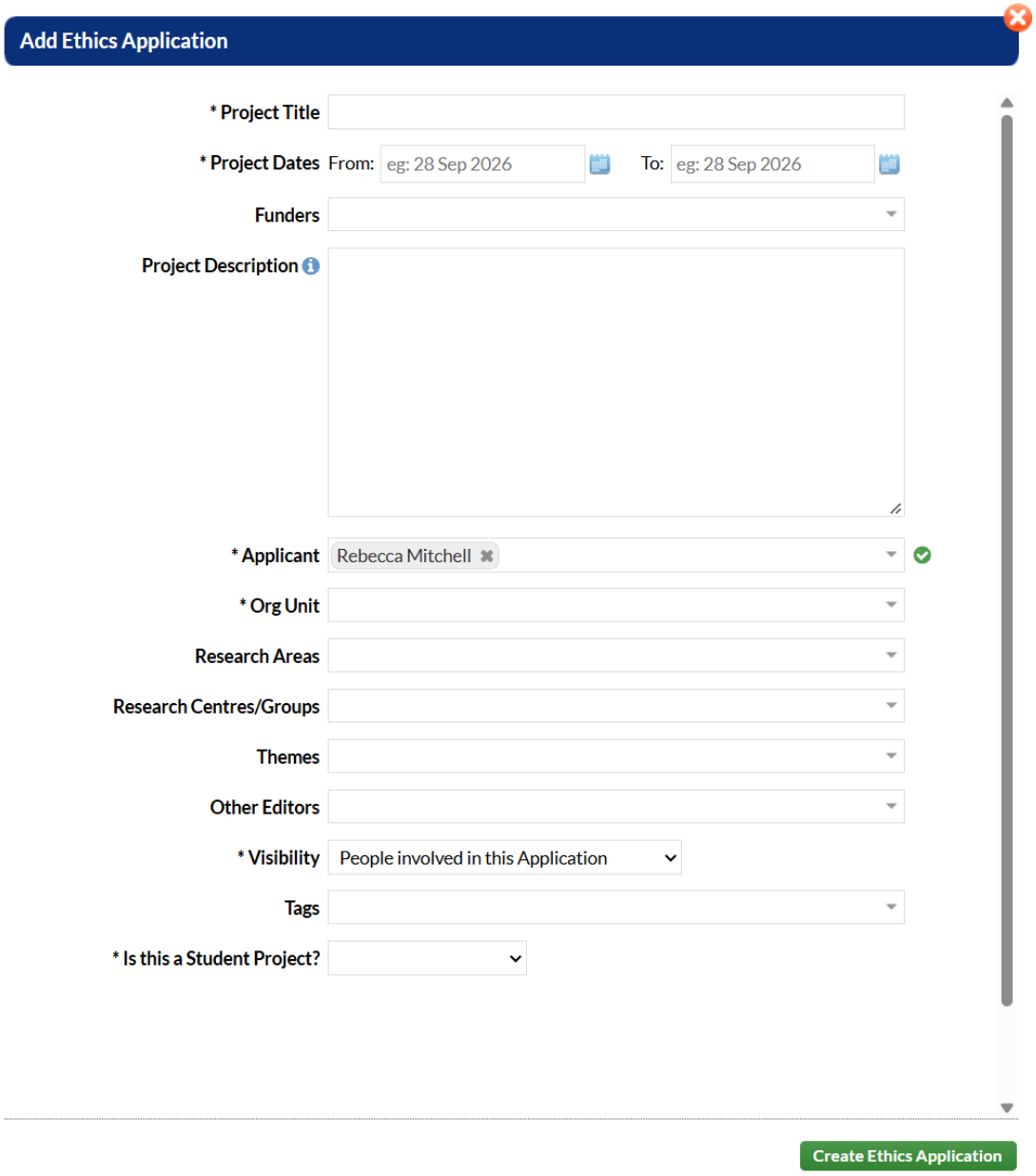
v. Help

The Help tab will show any system-wide announcements, general help topics, a document repository of MacEwan-specific guidance, and general information about WorkTribe itself.

3. Submitting a new application

Creating an ethics application

To start a new application, navigate to the Ethics tab on the blue bar, and select 'Create Application'. The following page will pop-up:

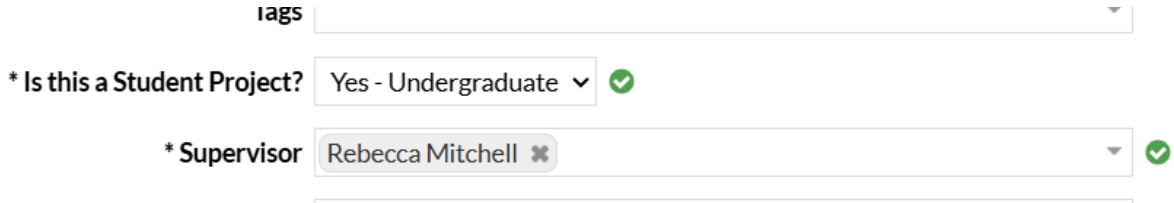


While not required, we encourage you to assign research areas, centres, themes, and tags to your project where relevant. These statistics are helpful for the generation of internal ORS reports.

To add co-investigators that will have access to the ethics application, search for their name in 'Other Editors'. Those added here will be able to view and edit the application.

For Student Projects: If this is a student led-project, such as an honours thesis or independent study, you now have the option to have the student create and submit the application under their name (you will then review the application before it is received by an ethics board). If they don't have a staff email account, they must first submit a Person of Interest Form.

The student will then initiate the project themselves, and add you as their supervisor when prompted:



Once the student submits the project, it goes to the supervisor for review. You can request changes from the student as many times as you need before you approve it for ethics review. Once you approve it for ethics review, it will then be forwarded to the ORS/REB/AREB, as applicable.

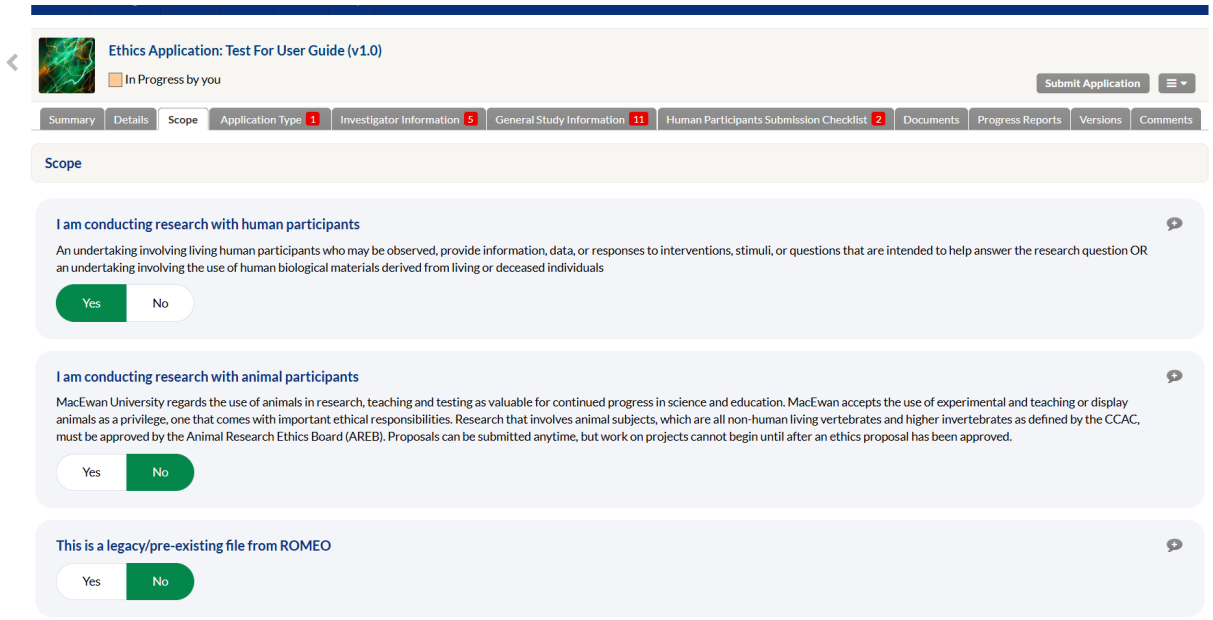
Selecting participant population

As WorkTribe uses branching logic, your application type and corresponding questions will be guided by your selections.

For human research: select 'I am conducting research with human participants'
This is assigned to the Research Ethics Board for review.

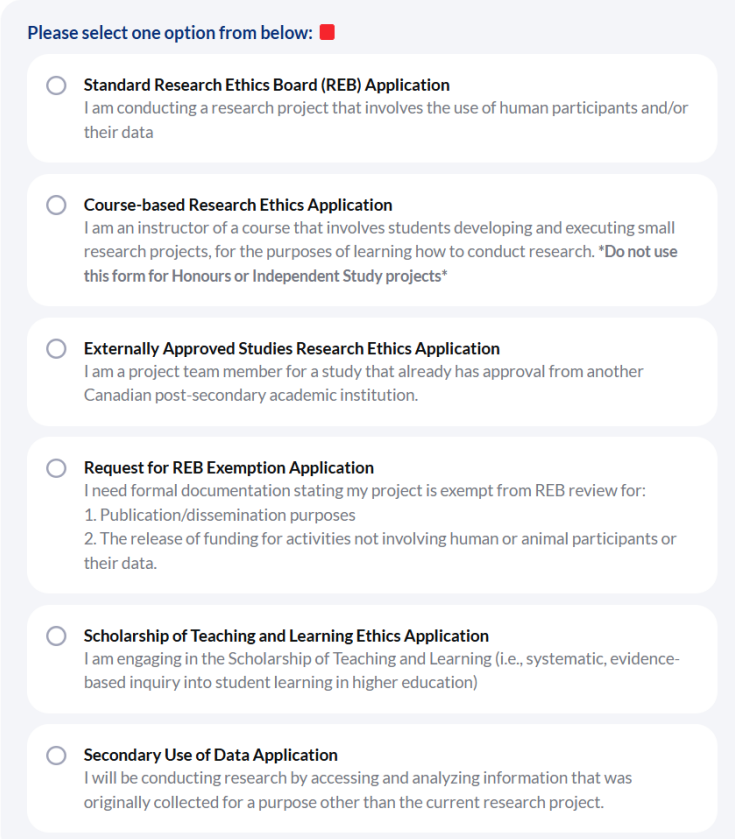
For animal research: select 'I am conducting research with animal participants'
This is assigned to the Animal Research Ethics Board for review.

This is a legacy/pre-existing file from ROMEO: select No. All your legacy files will be transferred on your behalf by the Office of Research Services before you log on for the first time.



The example shown above is for a **new** project that will be using **human participants** or their data in research.

Choosing the correct application type



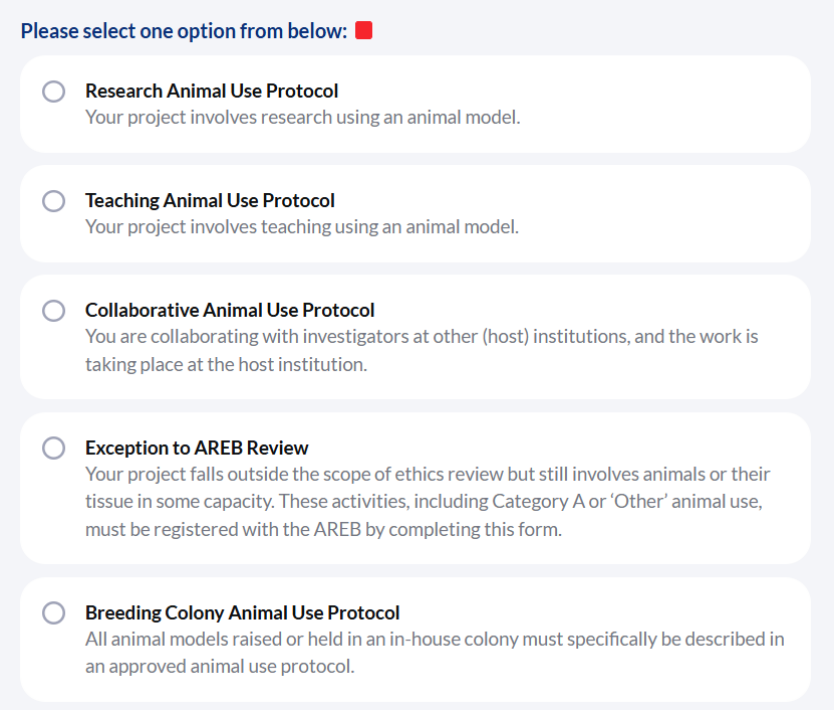
Once your participant population is selected, you will see a series of application types with a description. Select the application type that best suits the work you will be doing.

For research involving humans, you will select from standard, course-based, externally approved, exemption, SoTL and the secondary use of data.

If, after reviewing the descriptions, you are still unsure of which application to choose, please email REB@macewan.ca.

For research involving animals, you will select from research, teaching, collaborative, exception and breeding colony forms.

If, after reviewing the descriptions, you are still unsure of which application to choose, please email AREB@macewan.ca.



Completing the form

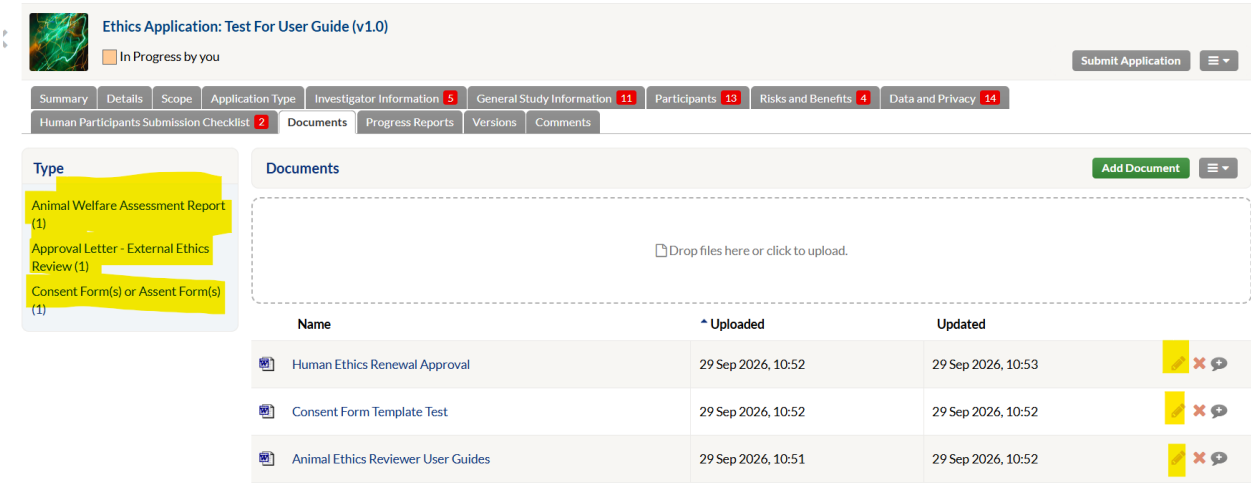
Once you have chosen your scope and application type, the form will start to branch according to the specific nature of your project. Complete all required elements of the form with as much information as you have.

Each tab will show a number in red, drawing your attention to sections that have not yet been completed and are mandatory. You will not be able to submit your application without completing these fields.

Uploading documents

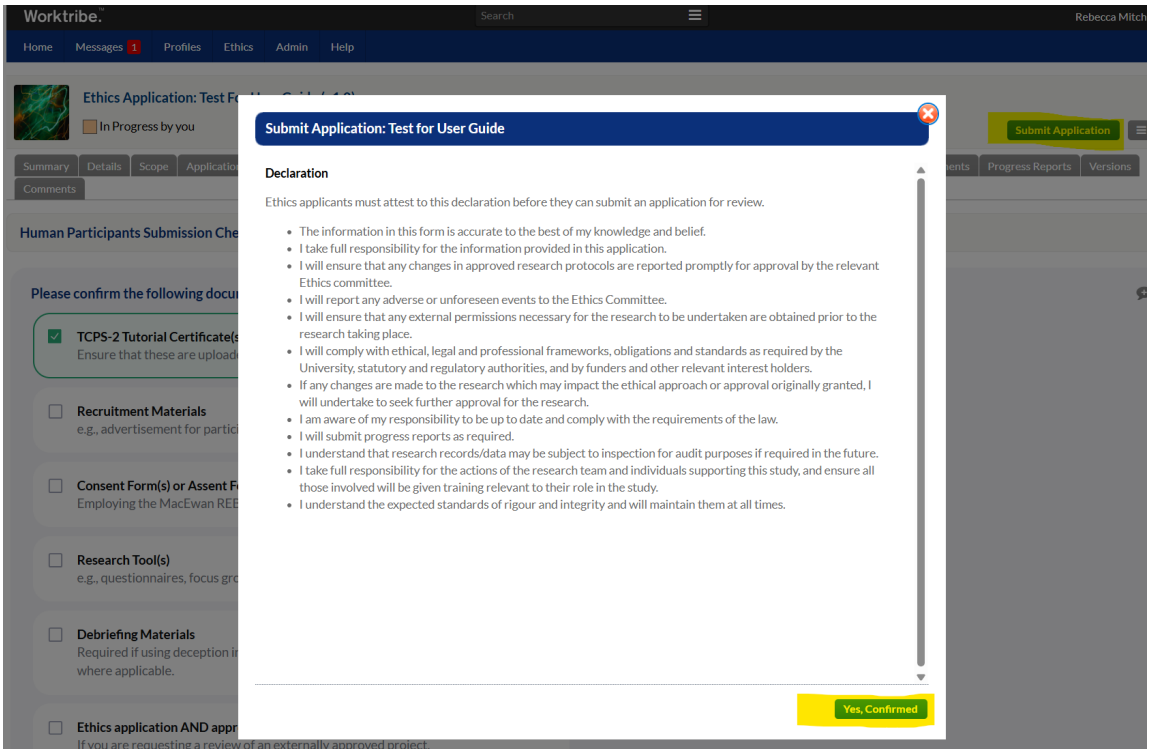
To add your study documents, such as the consent forms, TCPS2 certificates, questionnaires, and other research tools, you can click and drag from your computer files into the documents tab. You can also select "Add Document" to add a document by selecting from your files. The system will automatically generate a name for your file, but you can add the document 'Type' by selecting the pencil for each upload and choosing from the dropdown list.

This populates a list on the left side of the tab, making it easier to find specific documents when returning to make revisions after review or when submitting an amendment.

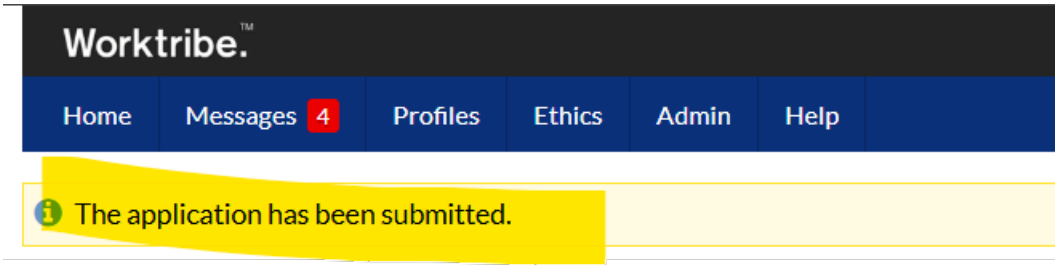


Submitting your application

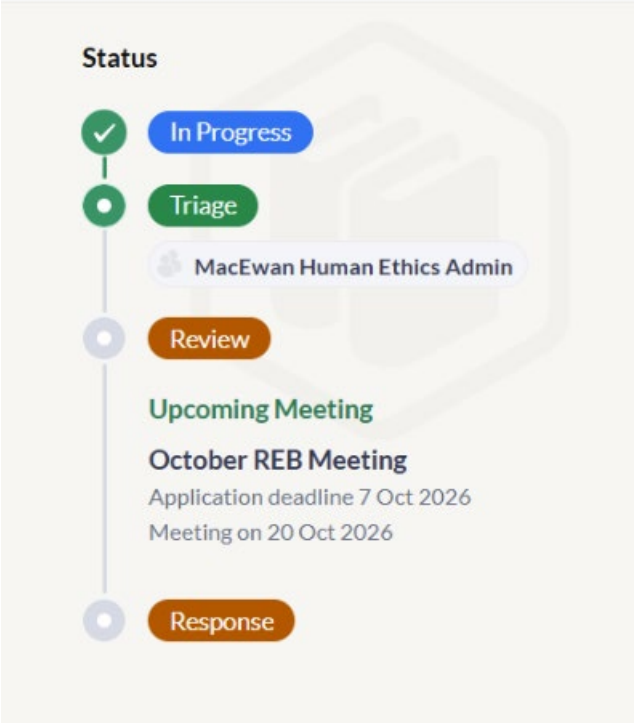
Once you have completed your application, there will be no red numbers indicating incomplete sections, and the 'Submit Application' button on the top right side of the form will turn from gray to green. Select 'Submit Application' and confirm the declaration page to move your study to review. If you have left a mandatory field incomplete, you will not be able to submit your application and will be prompted to complete the field.



You will get a notification on the top of the page confirming that your application has been submitted.



Tracking review progress

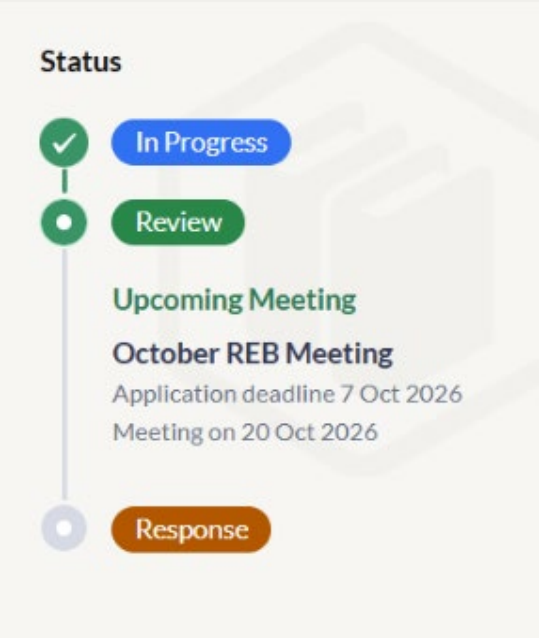


You are able to check on your application to see where the study is in the review process.

The study is first sent to Triage, where in-office ORS staff will review your submission and request additional information, if needed. You will receive a notification if additional information is required.

If no changes or additional information is needed, reviewers will be assigned to your project. The status will change to 'Review'.

While it will indicate when the next board meeting is, it doesn't necessarily mean that your study is being reviewed at a board meeting - most applications do not require a full board review. You will receive a separate notification from the ORS if your study has been assigned for full board review. Otherwise, you can assume the project is undergoing a delegated review.

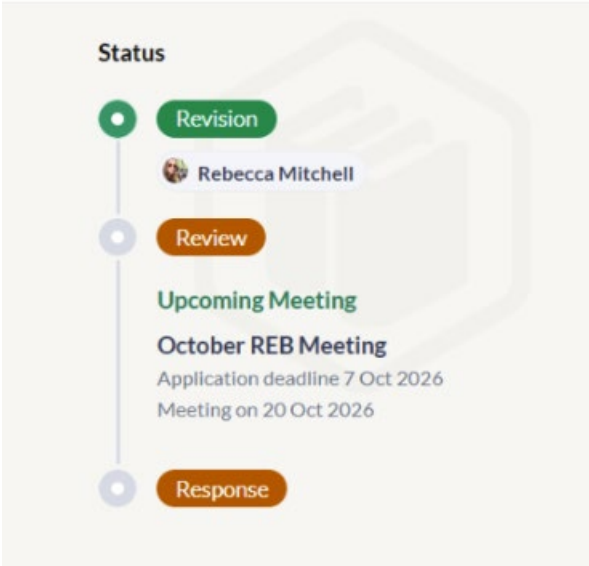


4. Addressing Reviewer Comments

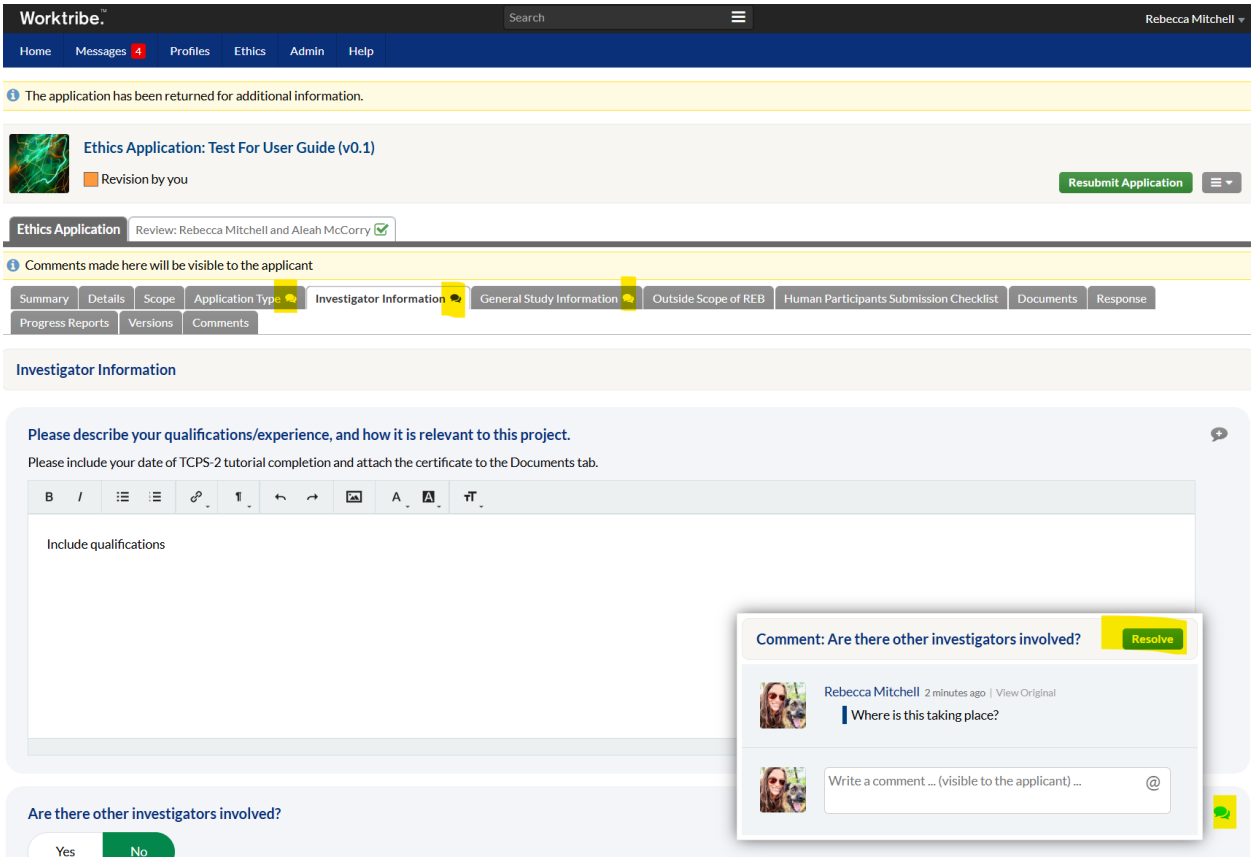
If revisions are needed prior to approval, you will receive a notification indicating so. Your study status will also change to 'Revision'.

While you will get an email notification letting you know revisions are needed, **you will no longer receive a revision request letter, as you did with ROMEO**.

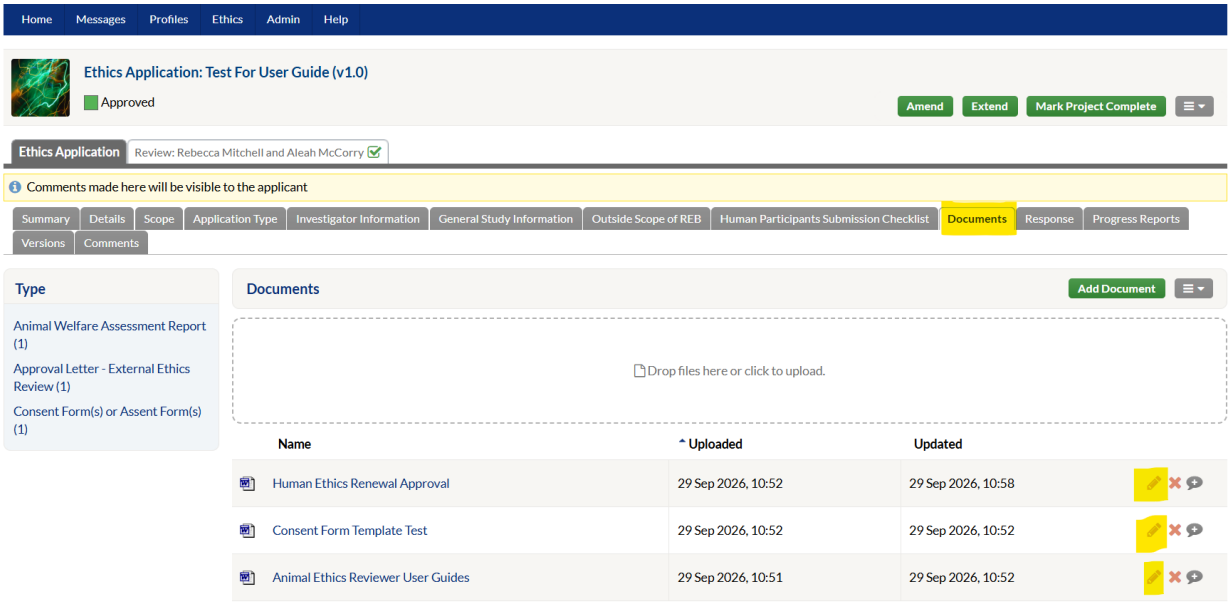
Instead, when you log back into your application, committee feedback will be noted directly on the question that needs revision.



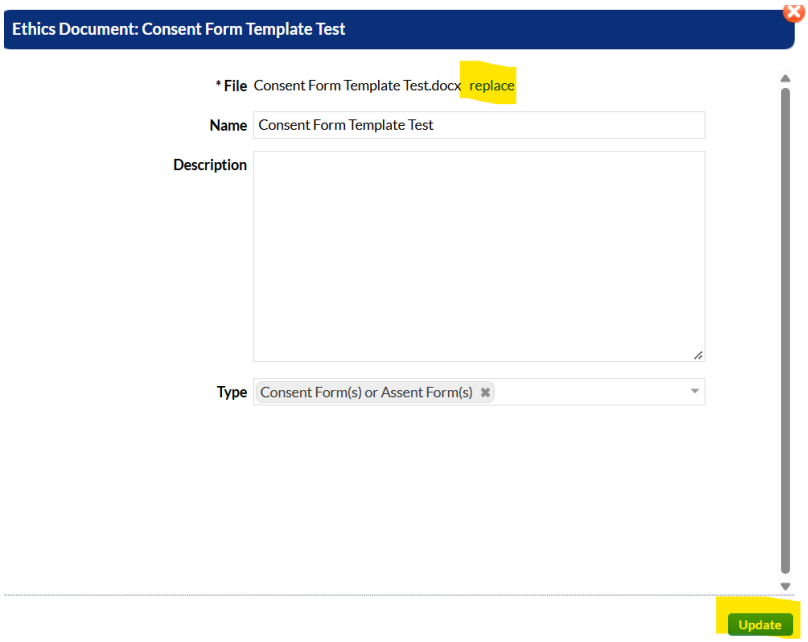
When you log back in to your application, tabs with feedback/revisions in them will show with a small speech bubble image. When you navigate to that tab, scroll down to any questions with the pop-up box, which will have a green speech bubble. Review the comment, make the revisions directly on the application, and then select 'Resolve' on the feedback box. Continue throughout the application, ensuring that all feedback is resolved.



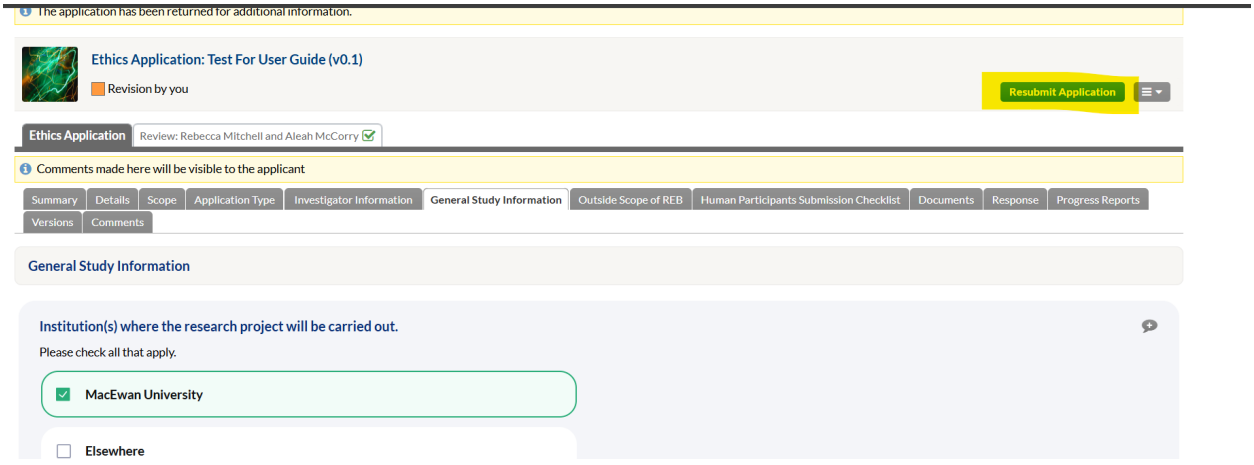
If revisions are needed on your attached documents, simply replace the document with an updated, track-changed version. For example, if you are revising your consent form, navigate to the Documents tab, and select the pencil beside the document you are revising.



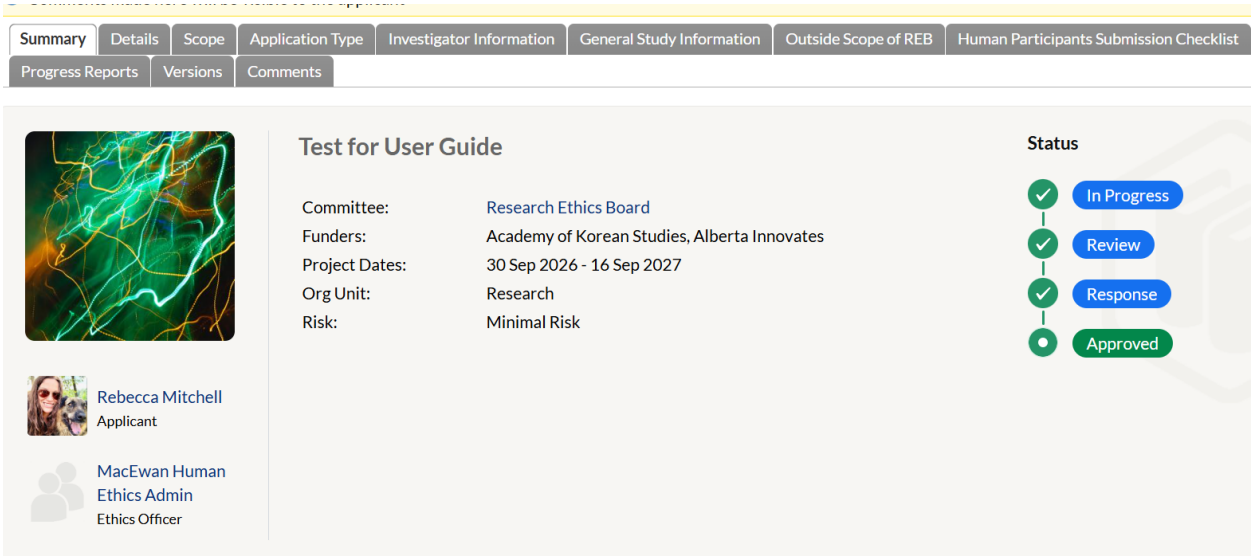
Select ’replace’ to upload your track-changed version of the consent form, then select ’Update’.



Once all changes are made, their comments 'Resolved', and revised documents are uploaded, the 'Resubmit Application' button on the top right of your study will turn green. If the button is not green, you have not addressed all revisions. Select the button to return your application for approval.



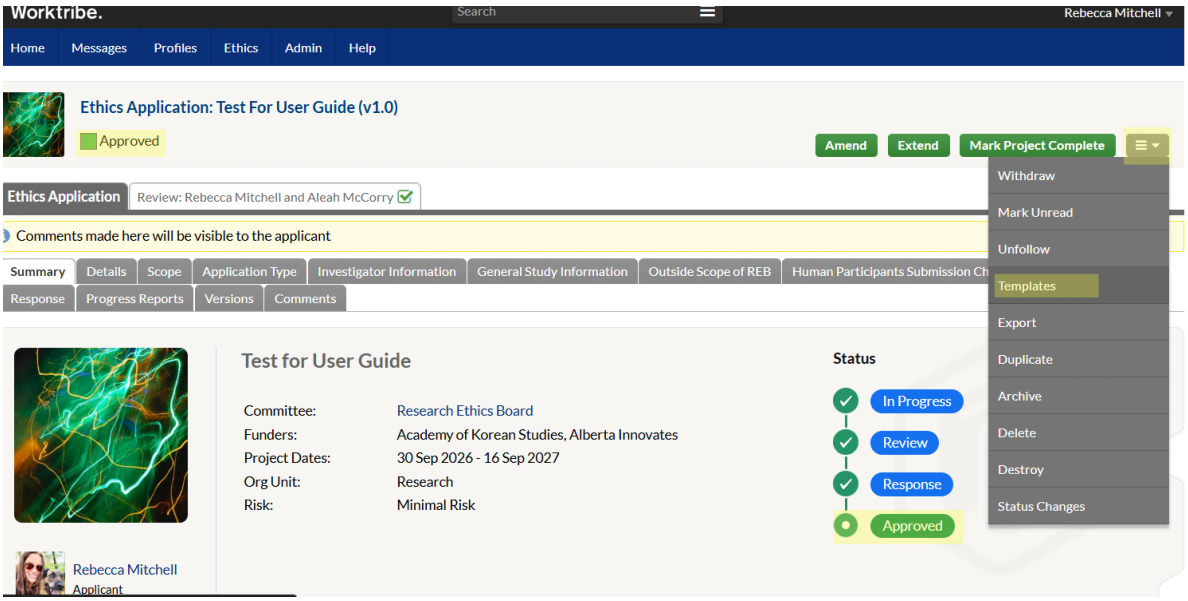
If you've made all the requested changes, you will get a notification that your study has been approved. This will be reflected in your study status.



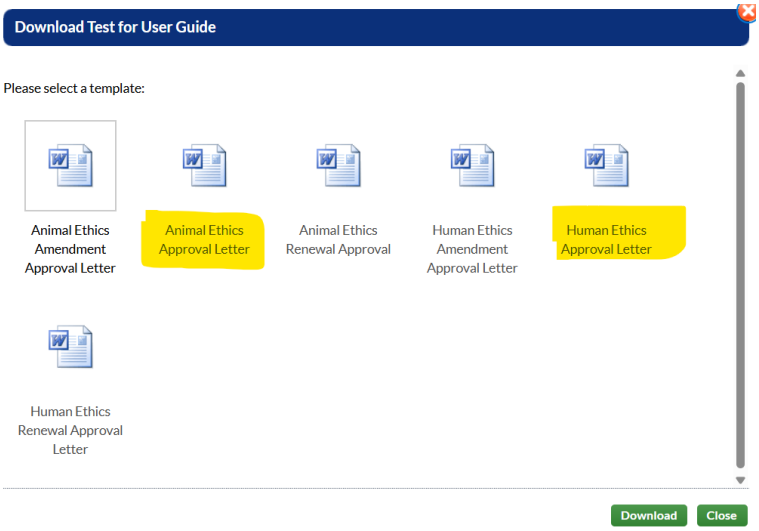
5. Accessing Your Approval Letter

When you receive a notification that your study has been approved, you can now download the approval letter in WorkTribe.

Navigate to the drop-down menu on the right side of your project, and select ‘Templates’:

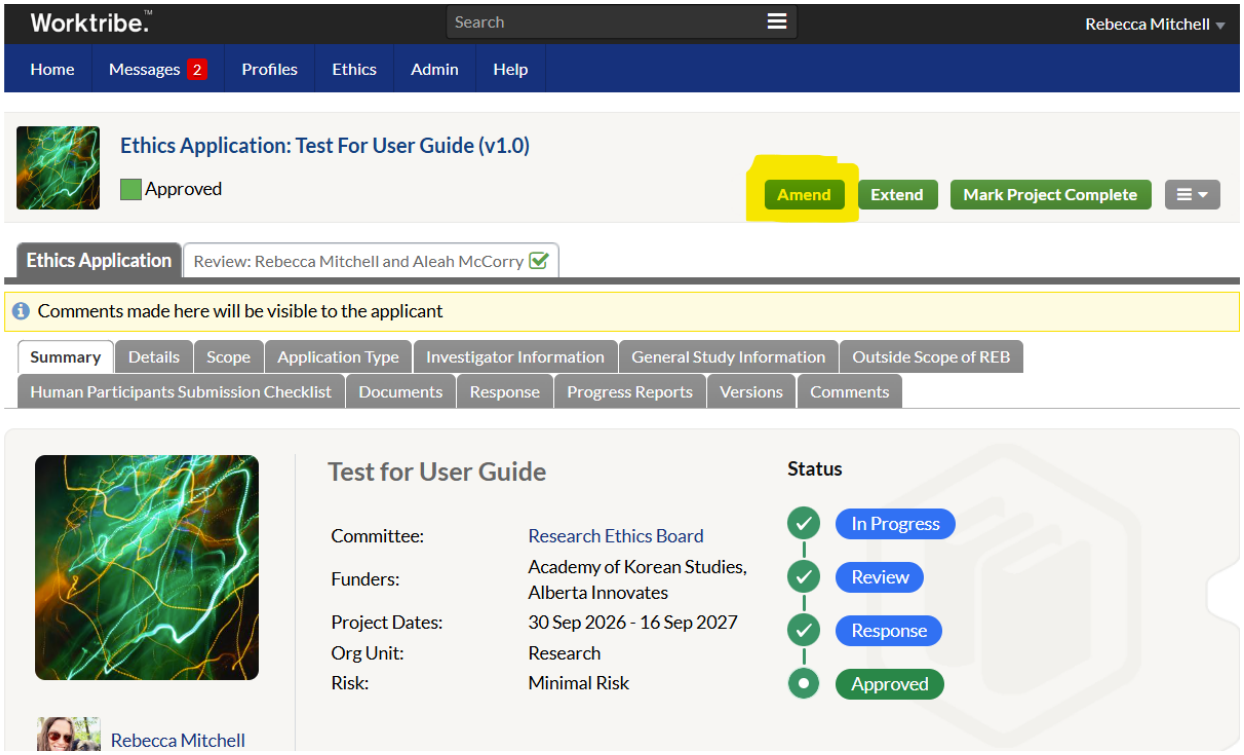


Choose the approval template that applies to your study type (involving animal or human participants), and your approval letter will be generated and saved onto your computer.

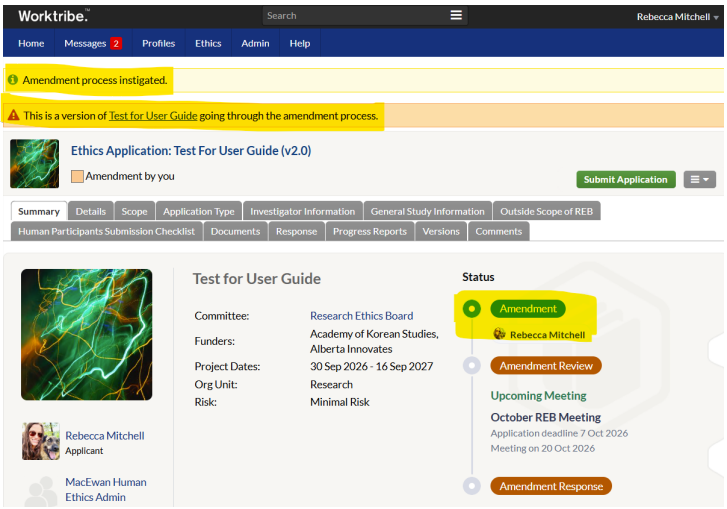


6. Amending an Approved Study

If you need to make any updates/changes to your approved study, you can submit an 'Amendment' for ethics review. Navigate to your study and select 'Amend'. A pop-up box will ask for details about why the study is being amended.



Unlike ROMEO, where each change was logged as a separate event, WorkTribe requires you to make the changes directly on the application form. You will see banners indicating that an amendment process has been instigated, and that the version you are working on is the amendment version.

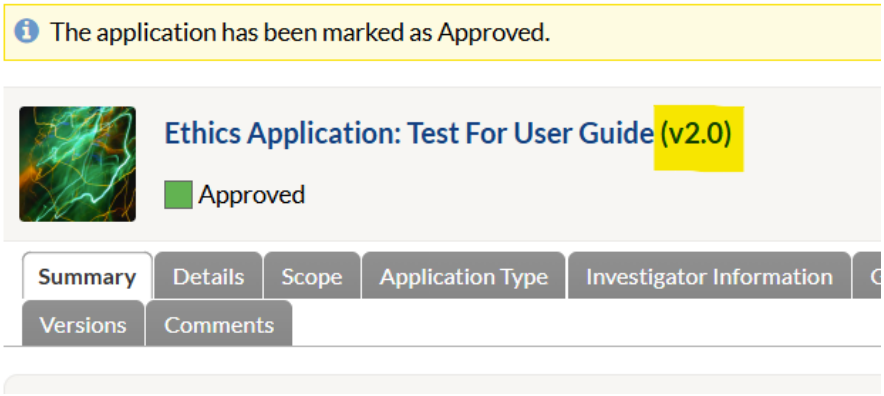


Even though it seems like you are overwriting your original application, the system itself will save a version

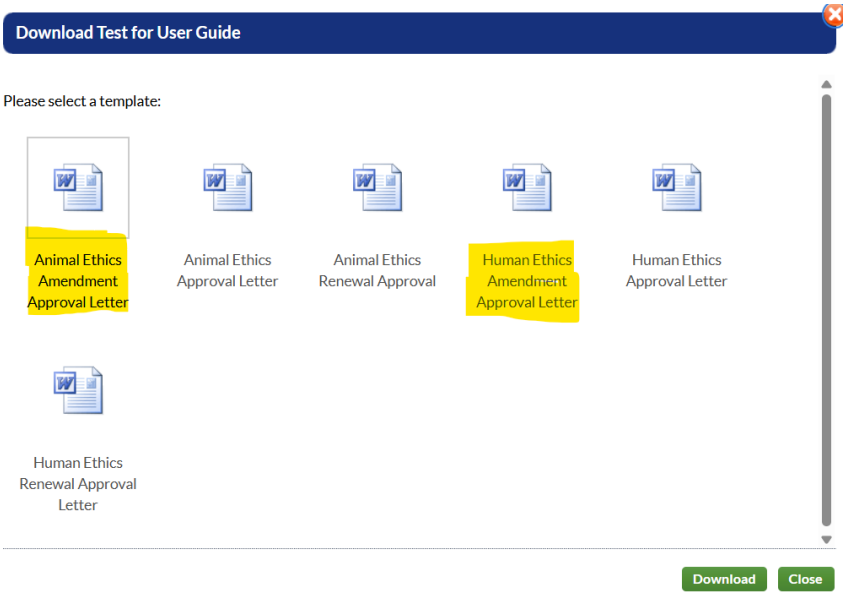
history in an audit trail. If you ever need to access previous versions of your application or documents, you will be able to do so.

Similar to your initial approval process, if you wish to update any of your study documents, simply 'Replace' the original document version with a track-changed updated version. A history of each document version will also be accessible in the audit trail.

You will be notified if your amendment needs additional information, or if it has been approved. Once it's approved, you will see the version number of your project change:



Accessing your amendment approval letter is the same process as described above for your initial study approval. Select the drop down menu, and navigate to 'Templates'.

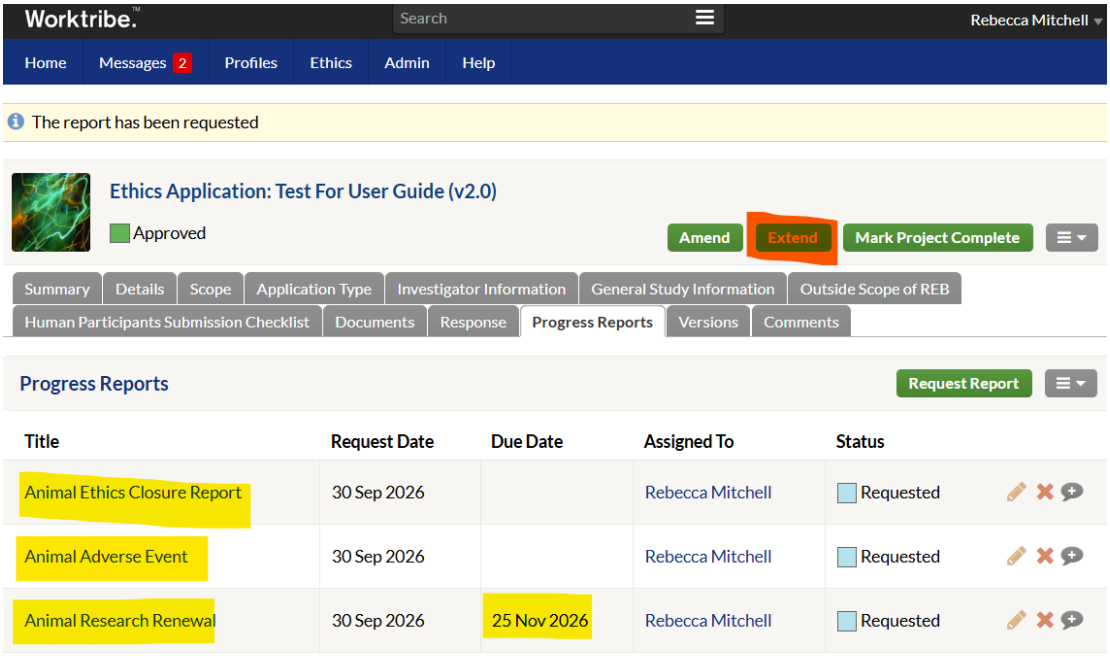


Select the amendment approval letter that corresponds to your application type, and click 'Download'.

7. Submitting Progress Reports

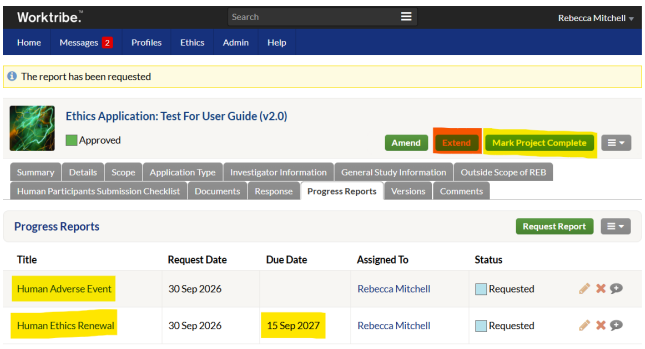
Annual renewals, serious adverse events and, for animal studies, project closures, are all managed through the 'Progress Reports' tab.

When your study was originally approved, the appropriate progress reports were assigned to your study.



A renewal will be scheduled as a progress report to be completed on or before your study end date. You will receive an automatically generated email reminder two weeks before your renewal is due. DO NOT use the 'Extend' button highlighted in red in the above and below screenshots.

You will also have access to adverse events and closure forms. They do not have an end date, as they can be submitted when the appropriate time arises.



For studies using human participants, a renewal progress report is set for your study end date, with an email reminder two weeks before its due date. DO NOT use the 'Extend' button.

The adverse event form is available if needed. The study can be closed by selecting the 'Mark Project Complete' button.