

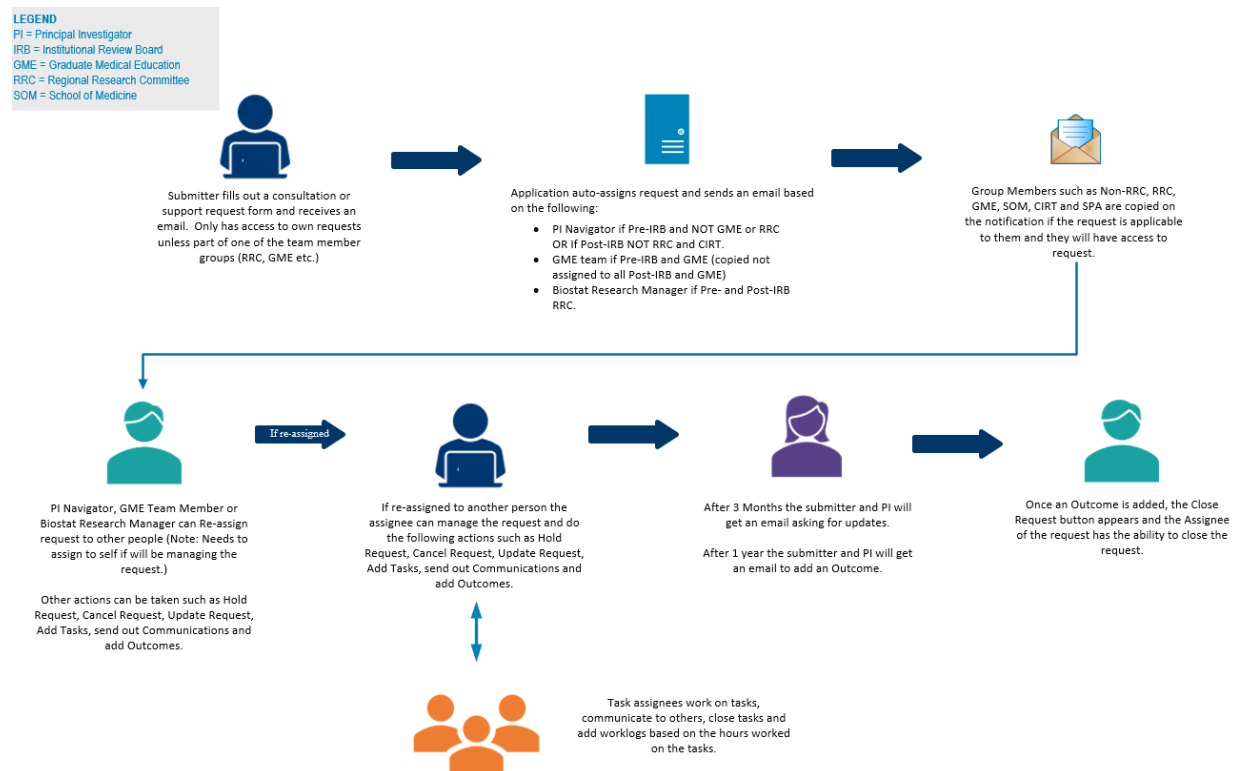
Virtual Research Office (VRO) Consultation/Support Request Guide for Medical Center Investigators (MCIs)

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VRO Consultation / Support Workflow



The Virtual Research Office provides physicians interested in conducting research with resources, tools, and contacts to help them get started, and supports them throughout the research process.



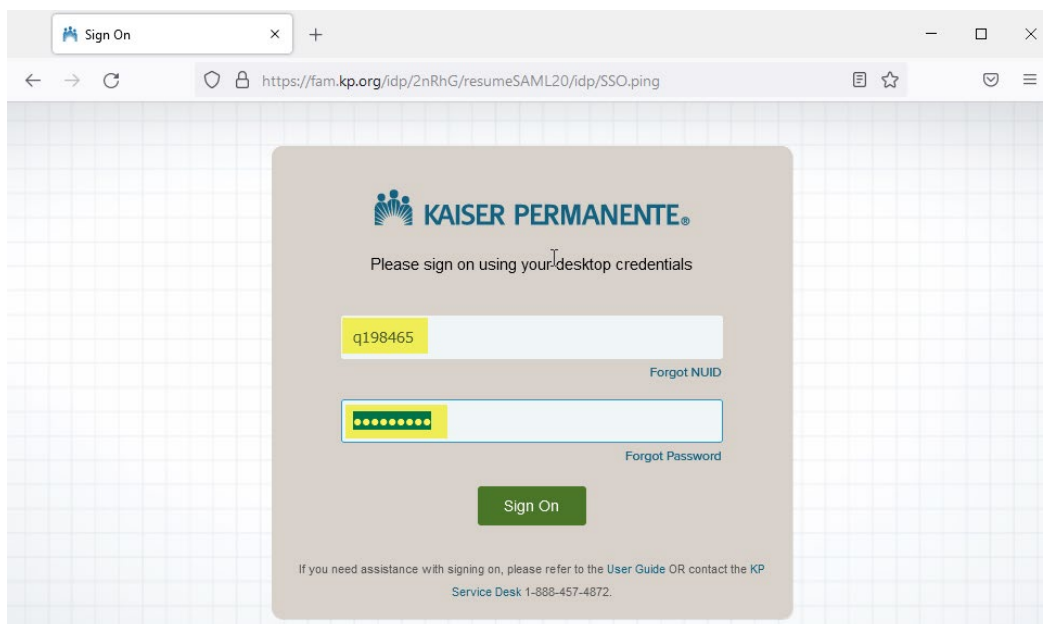
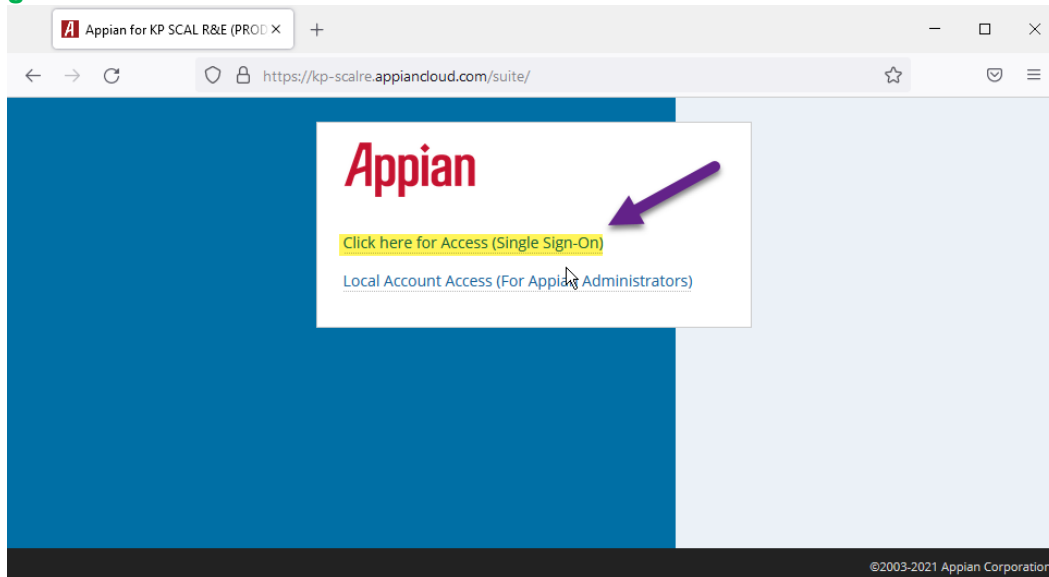
How to Log Into Appian



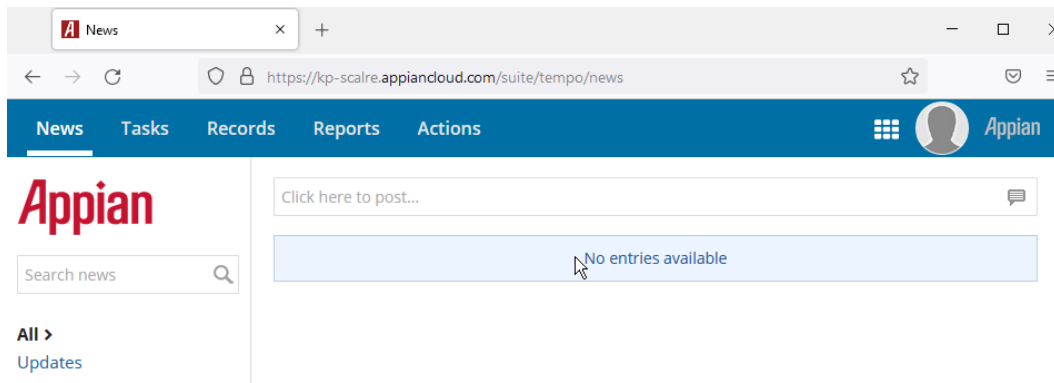
1. Go to <https://kp-scalre.appiancloud.com/> and click on “Click here for Access (Single Sign-On)”. Log in using your Windows Username and Password.

Note: Once you log in once, you'll be able to access the site without having to provide your credentials each time.

If you access the site from your home computer outside the KP network, you will follow the same instructions, however, it will also ask you for your PingId code to get into the site.

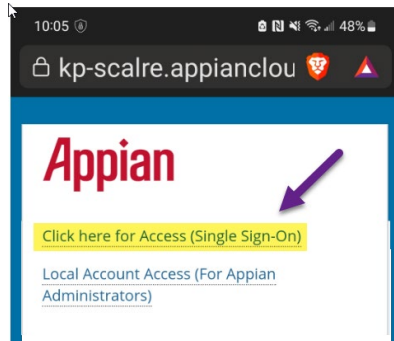


2. You will be taken to the Appian Homepage (Tempo) when first logging into Appian.

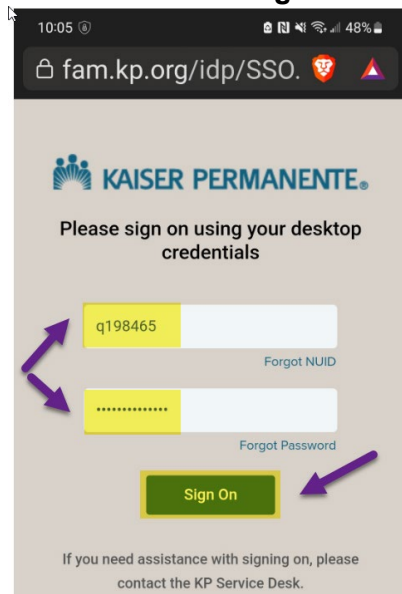


3. To access the application on your mobile device in the browser, if you are connected to the KP network, it will function the same as above. However, **to access the Appian application outside the network on your mobile device** you will need to do the authenticate using PingID:

- a. Click “Click here for Access (Single Sign-On)” in your browser

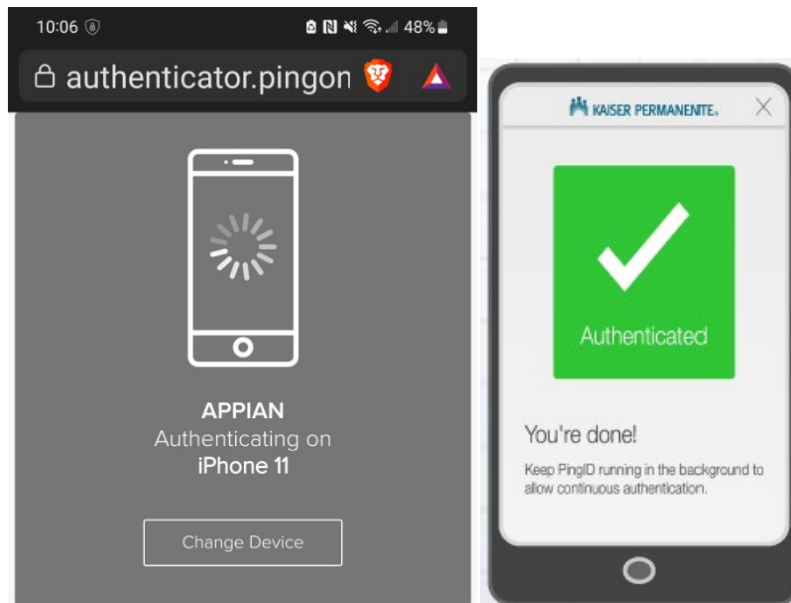


- b. Fill in your windows NUID and password. Same as your computer NUID and Password. Click “Sign On”.



- c. Once you enter your NUID and password, you will need to use your PingID to authenticate. Either using your phone or computer, whichever you normally use for Ping ID. Use your biometric sensor on your mobile device or copy and paste in your computer app to approve your authentication request. You will get a confirmation that you are Authenticated once completed.

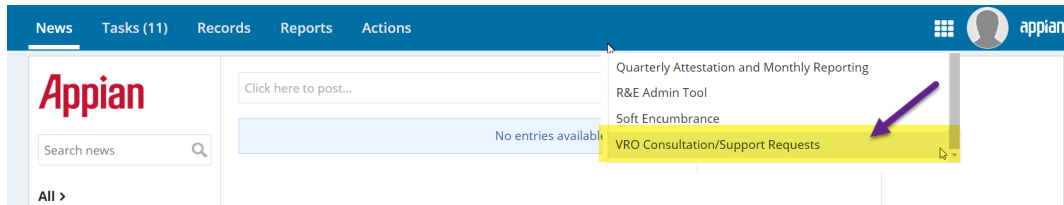
Note: Once authenticated, you should be able to log in the next time without PingID.



How to access the VRO Consultation/Support Request App

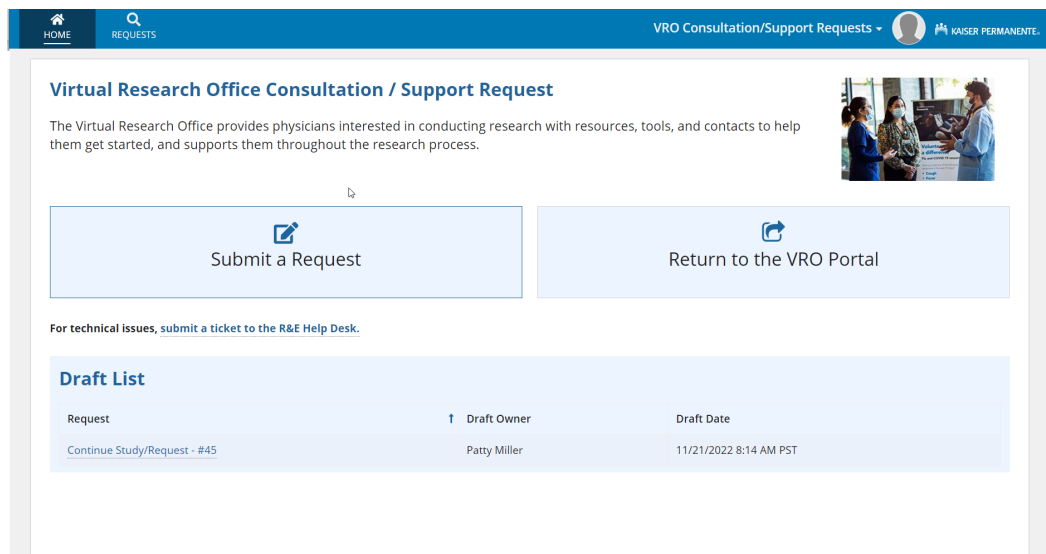


1. Click on the VRO Consultation/Support Request Link in the upper right drop-down.



Note: You can also just click this link to go directly to the application:
[https:// kp-scalre.appiancloud.com/suite/sites/vro-requests](https://kp-scalre.appiancloud.com/suite/sites/vro-requests)

1. This will take you to the VRO Consultation/Support Request App.



Home Page Info





1. You have three things you can do on the Home Page.


- You can “[Submit a Request](#)” to get consultation or support when conducting your research project. Just **click on the “Submit a Request” button**.
- You can “[Return to the VRO Portal](#)” if you need more information on research opportunities, how to do a research project and how to apply for funding as a few examples. **Click on the “Return to the VRO Portal” button**.
- If you have previously saved a draft of your request, you will see it in the “[Draft List](#)”. **Click on a request link** to finish filling out your request.

Virtual Research Office Consultation / Support Request

The Virtual Research Project provides physicians interested in conducting research with resources, tools, and contacts to help them get started, and supports them throughout the research process.




Submit a Request (a)


(b) **Return to the VRO Portal**

For technical issues, submit a ticket to the R&E Help Desk.

Draft List

Request	Draft Owner	Draft Date
Continue Study/Request - #1 (c)	Ivan Lizarraga	5/17/2022 3:26 AM PDT

Submit a Request



1. Once you get to the request form, complete all the information on the form.

Note: If you see an asterisk next to the question, it is required. Here's an example:

General

What is the best contact phone number? *

Enter phone (888-888-8888)

Note: If you need to save your information and come back later, click the “Save Draft” button in the upper right-hand side of the screen. This will save your information and you will find the link on the home page to resume filling it out.

Request Submission Form

Please fill out this request form, which will help us to direct your request to the right place and get you the help that you need.

General Information

Submitter Patty Miller	Submitted On September 27, 2022
Submitter Email Patty.A.Miller@kp.org	Request Status New
Submitter Division / Unit Research Management Office	

2. Continue to answer questions throughout the form. If you see a question mark (?) with a blue circle, click on it to get help with that particular question.

Request Details

General

What is the best contact phone number? *

6265643248

What is the best email if not listed?

pmiller@kp.org

What is the PI's current affiliation? *

Physician

Are you the PI? *

☒ Yes ☐ No

PI Email * Patty.A.Miller@kp.org	PI Phone * 626-564-3428	PI Medical Center * Pasadena-So. Los Robles Admin	PI Department * Admin Services/HR Research OPS
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What is the study title? *

Patty Test Study

What is the expected deadline? *

11/30/2022

Does the study involve another institution outside of KPSC? *

☐ Yes ☒ No

3. When you get to the “[Provide study protocol here by:](#)” section you have three options.
 - a. You can [upload your current study protocol](#). The accepted document formats are PDF, Word, Excel, or PowerPoint. **Click the Upload button or drag and drop the file where it says, “Drop file here”.**
 - b. If you do not have a study protocol and need to start from the beginning, you can click “[Create Study Template](#)”. This will take you to another form that you can fill out to create a study protocol. You can also print this to a PDF to use to submit it to the IRB. (see below for more information)
 - c. Or you can type a response in the “[Or provide a brief description of the protocol or reason for request](#)” field.

Provide study protocol here by:

a. Upload your current protocol

UPLOAD Drop file here (a)

b. Use our study template to develop a protocol.

CREATE STUDY TEMPLATE (b)

c. Or provide a brief description of the protocol or reason for the request

(c)

4. If you had chosen (b) **CREATE STUDY TEMPLATE** in the above, when you click on the link it will take you to a new form can help you create a study protocol. It has helpful Tips and Tricks, and study questions that need to be answered to have a thorough protocol.

NOTE: You have a “Save Draft” button in the upper right that will save the record as part of the whole request.

Study Template Form

This study template will help you through the process of designing your study, asking questions and providing prompts to guide you through the various aspects of study design.

Helpful Tips and Tricks

1. Write the sections in enough detail so you don't have to remember how you did things and so the programmer/ biostatistician can work from these instructions. Think of this document as the operations manual for your project. The IRB doesn't require as much in-depth detail as suggested here, but the more you think through these things now, the less you'll have to do later. Plus, you'll have the details already written down, which makes drafting the manuscript easier and quicker.
2. When completing the Data Element form for the IRB, consider making a version that includes your variable definitions (ICD codes, etc.) so that you have the definitions readily available when you're ready to write the paper.
3. Draft mock tables for your results, especially the traditional Table 1 describing who is in your study (cases and controls).
 - a. This makes it easier for the biostatistician to format results in a way that helps interpretation.
 - b. Helps when you begin crafting the manuscript later.

General Information


Submitter Patty Miller	Submitted On September 27, 2022
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SAVE DRAFT


5. After you have answered the questions, you have the options of uploading the following documents depending on your study design.
- Consent Form Draft
 - Questionnaire/Survey Draft
 - Data Abstraction Form
 - Supporting Document

Additional Items Needed depending on Study Design


(a) **Consent Form Draft** - Template available on [IRB website](#)

UPLOAD  Drop file here

(b) **Questionnaire/survey Draft**


UPLOAD  Drop file here

(c) **Data Abstraction form** - For studies doing manual chart review. Template available on [IRB website](#)

UPLOAD  Drop file here

Additional Fields

(d) **Supporting Document**

UPLOAD  Drop files here

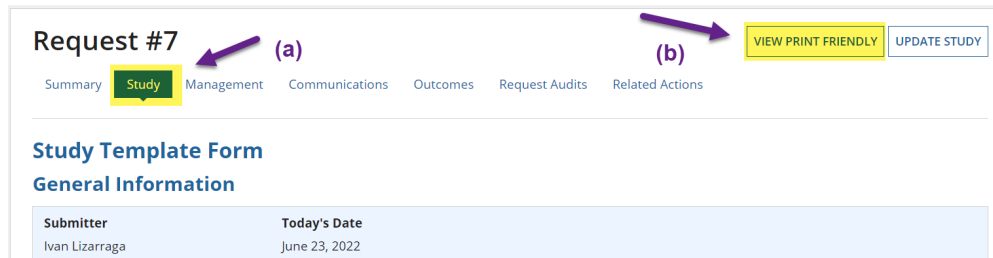
6. Once complete at the bottom of the form you can do the following:
- Add any final notes
 - CANCEL CHANGES** – **Note: This will delete the current changes made.**
 - DISCARD TEMPLATE** – **Note: This will delete the template completely.**
 - SAVE AND RETURN TO REQUEST** – When you click this it will save all changes and will take you back to the initial request.

Notes (a)

(b) (c) (d)

CANCEL CHANGES DISCARD TEMPLATE SAVE AND RETURN TO REQUEST

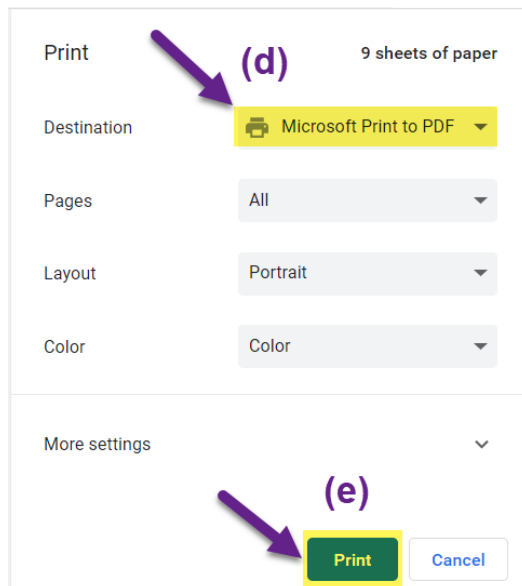
7. **AFTER YOU SUBMIT YOUR REQUEST**, you can come back to the Study template and can **print your study template to a PDF** (you can use it to submit to IRB), just
- Click the **Study** button on the top navigation.
 - Click the **VIEW PRINT FRIENDLY** button in the upper right-hand side of the screen.



- Hit **“Ctrl + P”** buttons at the same time on your keyboard



- Ensure you have the **PDF printer in the destination field**. It could be Microsoft Print to PDF, Adobe Acrobat etc.
- Click **Print** button




8. When back in the main request form, finish the remaining questions, add any additional supporting documents, or notes and **click “SUBMIT”** to start the request process.

Note: If you click “CANCEL” all your information will be gone if you didn’t previously save a draft.

Additional


Supporting Document

UPLOAD

 Drop files here

Notes

CANCEL



SUBMIT

9. Once you submit your request you will receive a confirmation email. The email provides a link that you can access your request at any time.

Note: You can also reply to this email just do not change the “To” field and the “Subject” field and the person managing your request will get the email.

VRO - DEV - [Request=16] Submission Notification

admin@kp-scaldev.apiancloud.com on behalf of VRO Application <processmodel1623@kp-scaldev.apiancloud.com>
To: processmodel1623@kp-scaldev.apiancloud.com, Patty A Miller

Caution: This email came from outside Kaiser Permanente. Do not open attachments or click on links if you do not recognize the sender.

Department of Research and Evaluation

VRO Consultation / Support Requests Application

Patty Miller,

This is an acknowledgement email for your request.

If you need to contact the technician or that your issue needs further clarification, you can just click "Reply" in your email account and this conversation will automatically be added to the Request.

Your submission has been created with Request 16. This is your reference number for future communications.

[Click To Access Request](#)

Here is a brief summary of your request:

Submitter: Patty Miller
Study Type: Pending
Funding Source: RRC
Study Title: test
Name of PI: Patty Miller

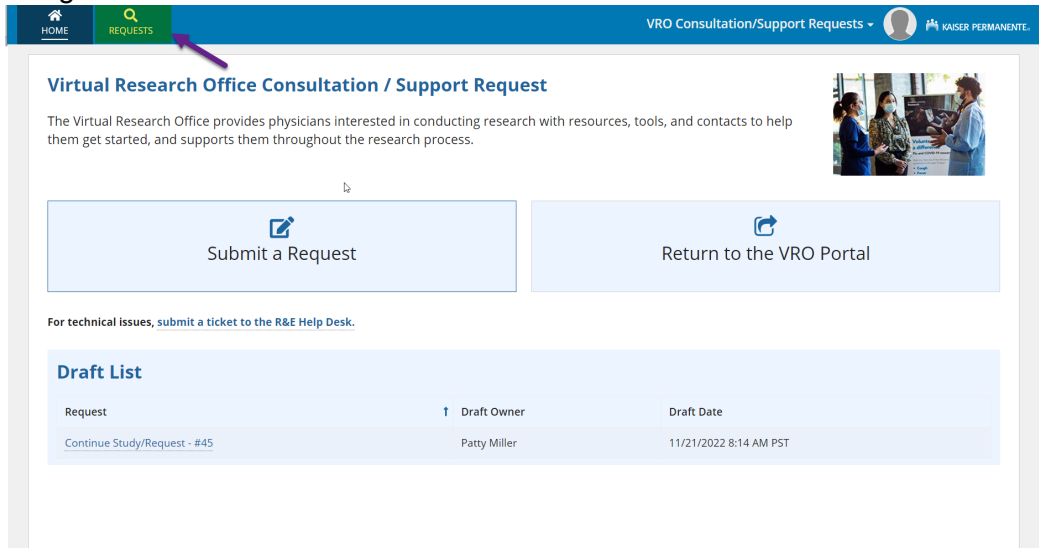
Thank you,

Research & Evaluation Virtual Research Office
Department of Research and Evaluation

Search for a Request



1. To find a previously submitted request, click on the “Requests” button in the upper navigation.



2. To find a particular request(s), you can filter by the following criteria:

- a. Request ID
- b. Study Title
- c. Request Status
- d. Submitter Name / NUID
- e. Assigned to
- f. PI Name / NUID
- g. Medical Center
- h. Submit Date

Just **click on a field** and type in or select what you would like to filter on. For example, if I wanted to see all the requests that Patty Miller submitted, I would **start typing the name and then select the correct one in the list**.

Note: You can search by multiple criteria. For instance, I could search for all assigned request statuses for a particular PI.

Search Requests

Request ID -- Search ID --	Study Title -- Search Study Title --	Request Status -- Select Request Status --
Submitter pat Patty Miller q198465 Kirt Patel p149284	Assigned To -- Search Assigned To --	PI -- Search By Name or NUID --
Submit Date From: mm/dd/yyyy To: mm/dd/yyyy		

☒ Exclude Completed and Canceled Projects

[CLEAR FILTERS](#)

3. To clear out your selection, **click the CLEAR FILTERS button**.

Submitter: -- Search By Name or NUID --

Assigned To: -- Search Assigned To --

PI: -- Search By Name or NUID --

Medical Center: -- Search Medical Center --

Request Status: -- Select Request Status --

Submit Date: From mm/dd/yyyy To mm/dd/yyyy

☒ Exclude Completed and Canceled Projects

CLEAR FILTERS

4. To see records that have been completed or cancelled, **unclick the checkmark**. These are automatically filtered out.

PI: -- Search By Name or NUID --

Medical Center: -- Search Medical Center --

Request Status: -- Select Request Status --

Submit Date: From mm/dd/yyyy To mm/dd/yyyy

☐ Exclude Completed and Canceled Projects

CLEAR FILTERS

5. To access a particular request, **click the Request ID number in the left column of the grid**.

Requests

[Export to Excel](#)

Request ID	IRB Status	Study Title	Submitter	Assigned To	PI	Medical Center	Status	Funding Source	Study Relation
12	Pre-IRB	Sept 23 Test	Patty Miller	Patty Miller	Patty Miller	Pasadena-So. Los Robles Admin	Assigned	External: Foundation	Graduate Medical Education
11	Post-IRB	Patty IRB Post test	Patty Miller	Ivan Lizarraga	Patty Miller	Pasadena-So. Los Robles Admin	Assigned	External: Federal (i.e., NIH, CDC)	N/A

6. To download a copy of your own requests, **(1) click the Export to Excel link**. Once the export is created, then **(2) download the Excel file**.

Requests

(1)

[Export to Excel](#)

Request ID	IRB Status	Study Title	Submitter	Assigned To	PI	Medical Center	Status	Funding Source	Study Relation
12	Pre-IRB	Sept 23 Test	Patty Miller	Patty Miller	Patty Miller	Pasadena-So. Los Robles Admin	Assigned	External: Foundation	Graduate Medical Education
11	Post-IRB	Patty IRB Post test	Patty Miller	Ivan Lizarraga	Patty Miller	Pasadena-So. Los Robles Admin	Assigned	External: F NIH, CDC)	

(2)

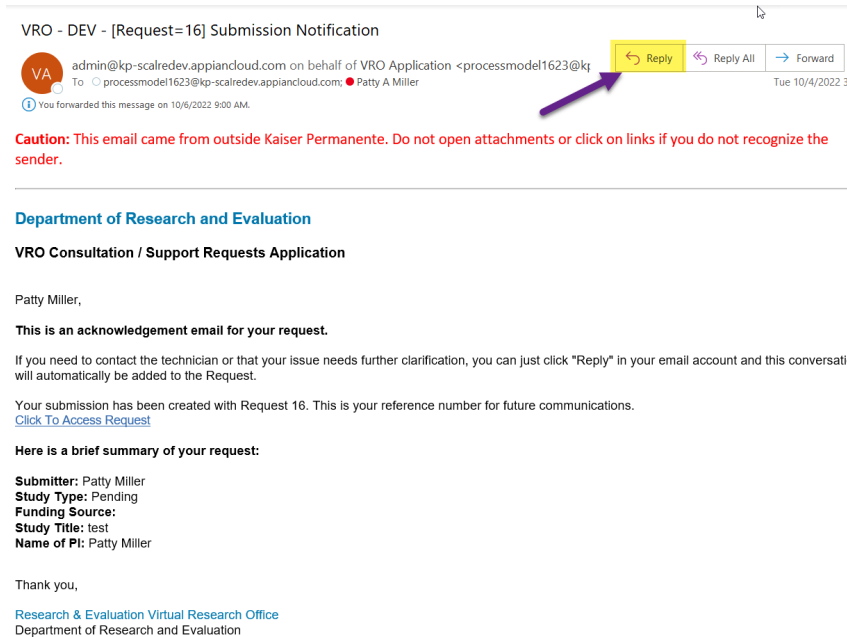
Export Complete ☒ [Download Excel File](#)

Funding Source Study Relation

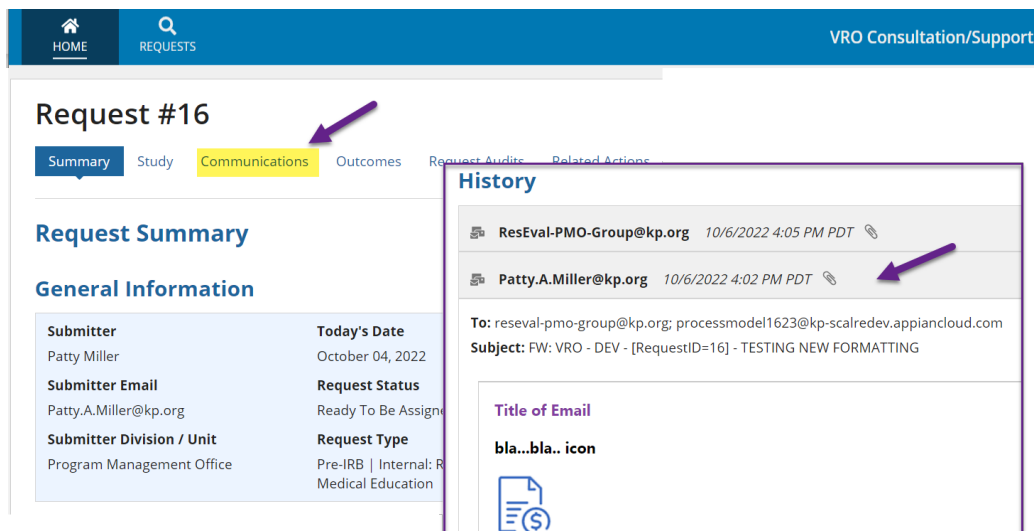
Communications (email history)



1. **Respond via email:** You can send an email back to the request by hitting the reply button in your email. **Do not change the “To” field and do not change the “Subject”.** These are important pieces of information the application needs to process the email.



2. **Communications History:** To see the history of any communications you have with the team member working on your request, you can view it by **clicking on the Communications link**. You will then see a list of emails. **Click on the gray bar to view.**



Outcomes



1. After one year, you will receive an email to add any project outcomes, such as an abstract, presentation, publication, or other types of outcomes to your request. **Click on the link in the email to access the request.**

From: admin@kp-scalredev.appiancloud.com <admin@kp-scalredev.appiancloud.com> **On Behalf Of** VRO Application
Sent: Tuesday, October 4, 2022 3:51 PM
To: processmodel1623@kp-scalredev.appiancloud.com; Patty A Miller <Patty.A.Miller@kp.org>
Subject: VRO - DEV - [Request=16] Submission Notification

Caution: This email came from outside Kaiser Permanente. Do not open attachments or click on links if you do not recognize the sender.

Department of Research and Evaluation

VRO Consultation / Support Requests Application

Patty Miller,

You have been assigned a new task for your project. Please fill out the outcome form here: [Click To Access Request](#)

Request number: 16
Study Title: Test Study Title
Name of PI: Patty Miller

Thank you,

Research & Evaluation Virtual Research Office
Department of Research and Evaluation

2. Click on the Outcomes link in the request.

Request #16

[Summary](#) [Study](#) [Communications](#) [Outcomes](#) [Request Audits](#) [Related Actions](#)

Request Summary

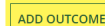
General Information

Submitter	Today's Date
Patty Miller	October 04, 2022
Submitter Email	Request Status

3. Once you are in the Outcomes tab, click **“ADD OUTCOME”** button in the upper right-hand side.

Request #16

Summary Study Communications **Outcomes** Request Audits Related Actions



General Information

Submitter Patty Miller	Today's Date October 04, 2022	Project Request Name test	PI Name Patty Miller
Submitter Email Patty.A.Miller@kp.org	Request Status Ready To Be Assigned	Assigned To Patty Miller	PI Email Patty.A.Miller@kp.org
Submitter Division / Unit Program Management Office	Request Type Pre-IRB Internal: RRC Graduate	Start Date	End Date
		Medical Center Pasadena-So. Los Robles Admin	

4. Answer all questions and then click **“SAVE AND RETURN TO REQUEST”** button.

Outcome #0

General Questions

Did the project meet it's goals? *

☐ Yes

☐ No

☐ Partially

What was the impact? *

Outcome Type *

Abstract

Outcome Description ?

Abstract

Submission Status *

--- Select a Value ---

Conference *

Title of Abstract *

Is the Abstract KP Internal? *

☐ Yes

☐ No

Is the Abstract Oral or Poster? *

☐ Oral

☐ Poster

CANCEL

SAVE AND RETURN TO REQUEST

Note: You can add multiple Outcomes as needed.

5. To edit or make changes to an existing Outcome, click the paper and pencil icon in the outcome.

Outcome(s)

Outcome #1

General Questions

Did the project meet it's goals? *

☒ Yes

☐ No


☐ Partially

Abstract

Submission Status *

Accepted


Conference *



6. Note, if the Outcome is closed, click on the bar with the arrow to open it.

Outcome(s)

Outcome #1



Getting Help



- For all technical issues, please submit a [Help Desk ticket](#) (Applications (R&E and KP), Subcategory – Appian).
- If you have any non-technical questions related to the content contained in the application, please contact our Research Navigator, [Jeff Slezak](#).

In addition, supplemental information is also available on the [Virtual Research Office portal](#).