

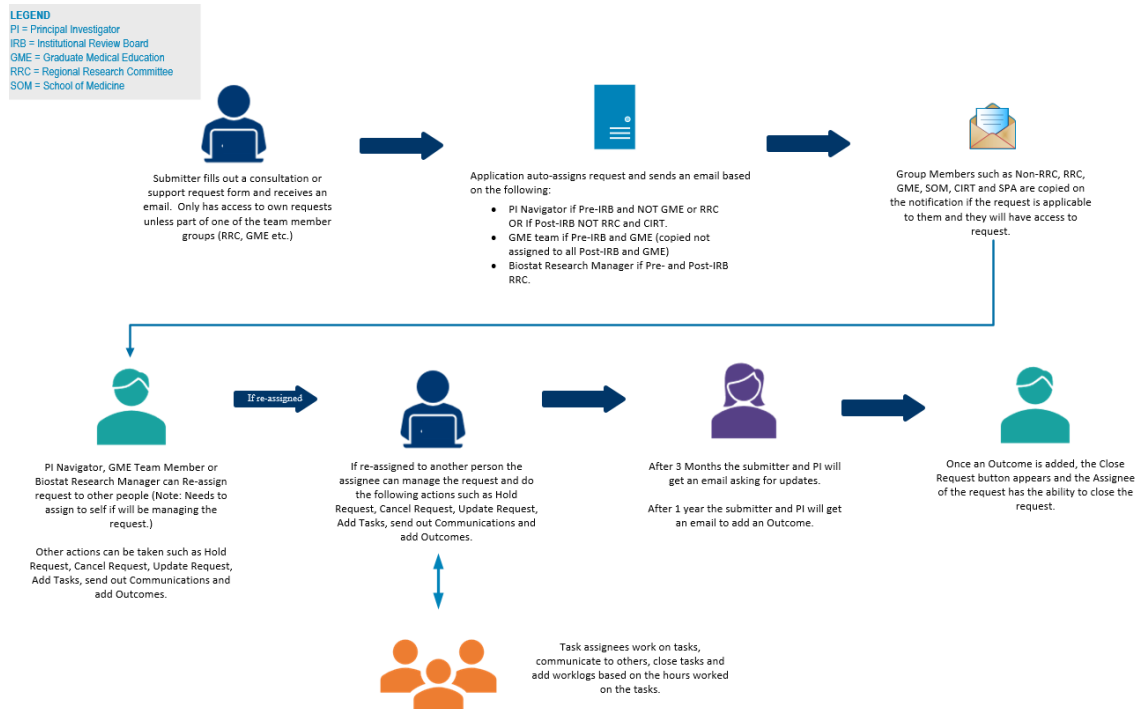
Virtual Research Office (VRO) Consultation/Support Request Guide for Request Management

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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.



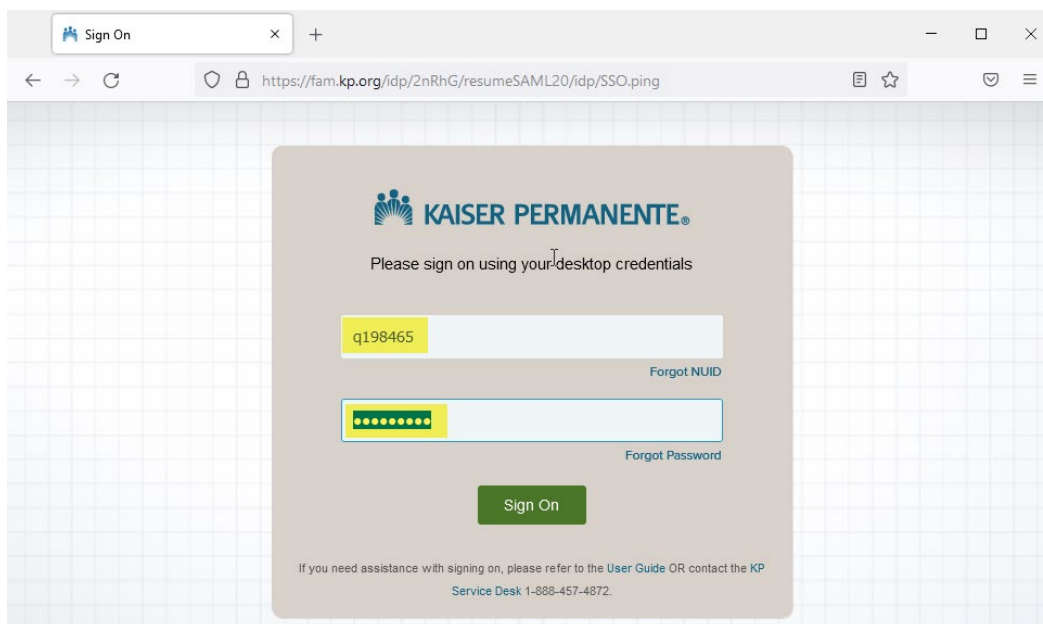
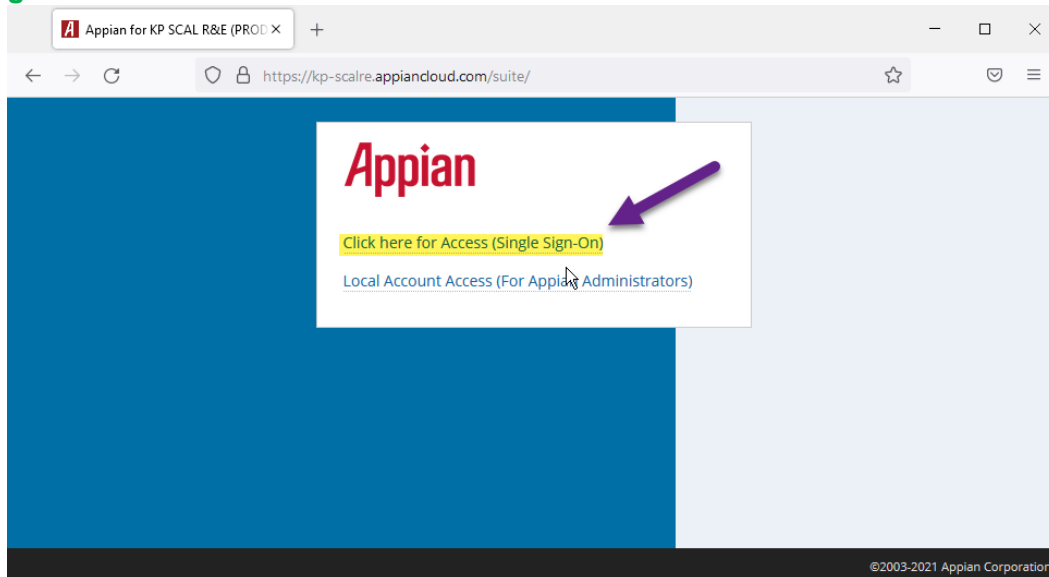
How to Log Into Appian



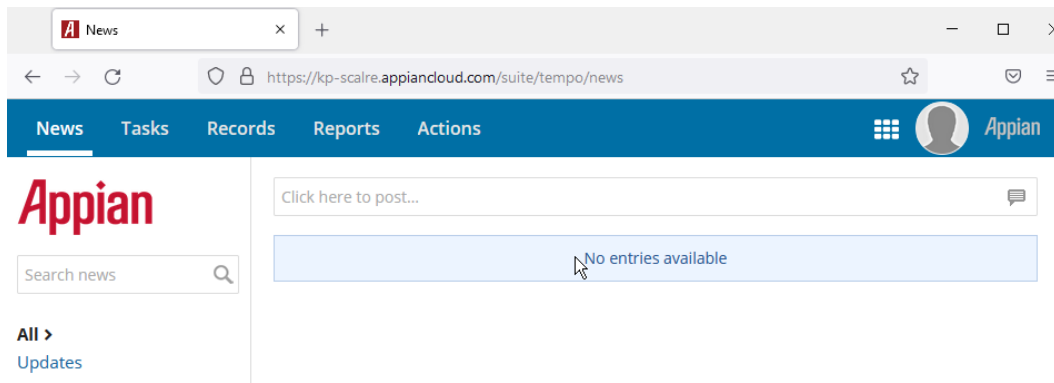
1. Go to <https://kp-scalre.appiancloud.com/> and click on “Click here for Access (Single Sign-On)”. Log in using your Windows Username and Password.

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.

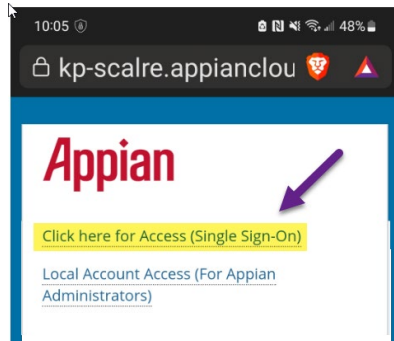


2. You will be taken to the Appian Homepage (Tempo) when first logging into Appian.

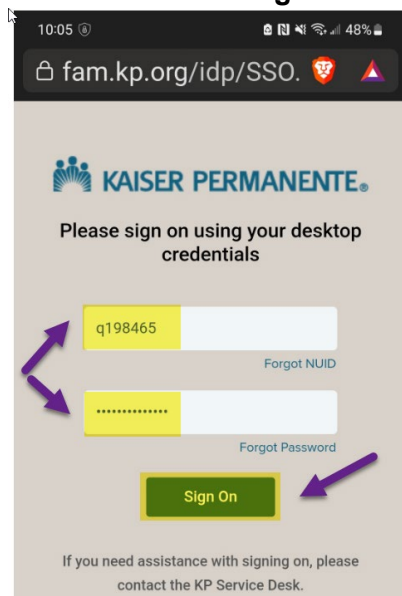


3. To access the application on your mobile device in the browser, if you are connected to the KP network, it will function the same as above. However, **to access the Appian application outside the network on your mobile device** you will need to do the authenticate using PingID:

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

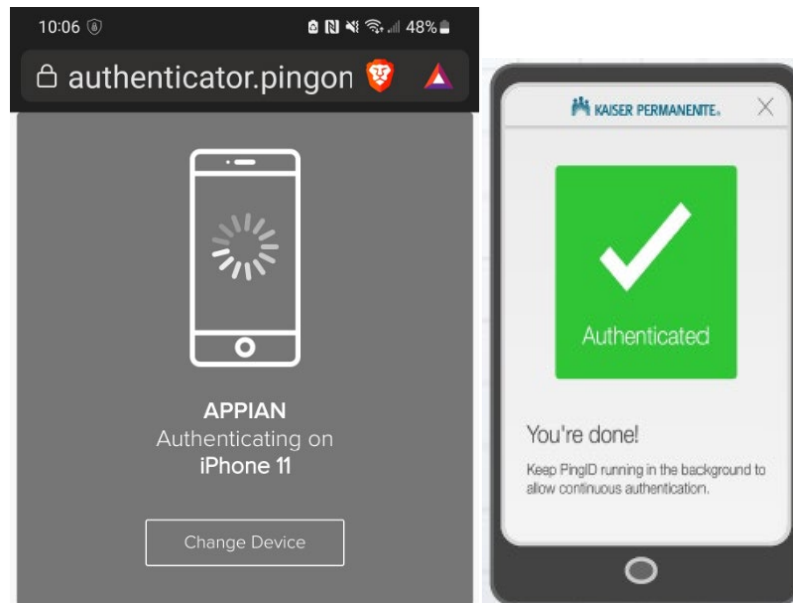


- b. Fill in your windows NUID and password. Same as your computer NUID and Password. Click “Sign On”.



- 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

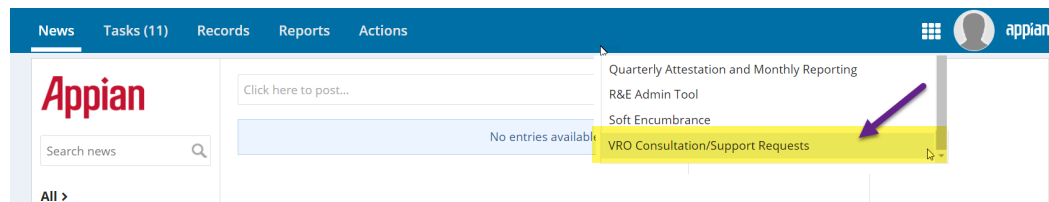


1. Click on this link to access the app:

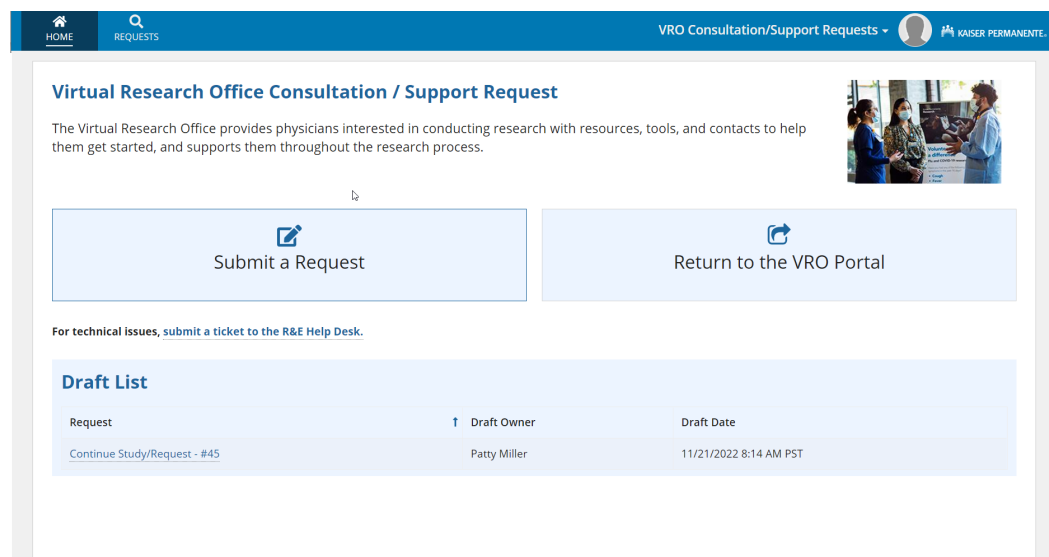
[https:// kp-scalre.appiancloud.com/suite/sites/vro-requests](https://kp-scalre.appiancloud.com/suite/sites/vro-requests)

OR if already in Appian

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



2. 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)

[Return to the VRO Portal](#) (b)

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.
- 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”.**
 - 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)
 - 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 (a)

UPLOAD Drop file here

b. Use our study template to develop a protocol. (b)

CREATE STUDY TEMPLATE

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

- 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.
- 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.
- Draft mock tables for your results, especially the traditional Table 1 describing who is in your study (cases and controls).
 - This makes it easier for the biostatistician to format results in a way that helps interpretation.
 - 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

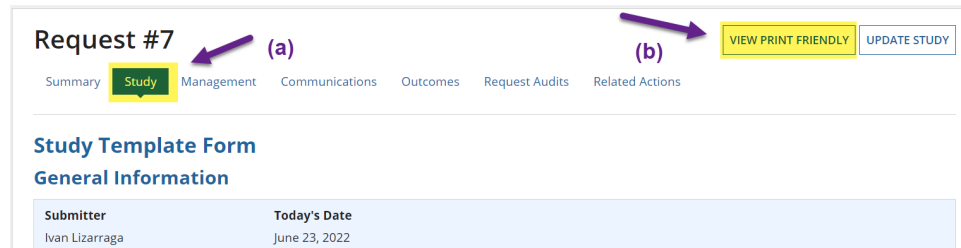
6. Once complete at the bottom of the form you can do the following:
- Add any final notes
 - CANCEL CHANGES** – **Note: This will delete the current changes made.**
 - DISCARD TEMPLATE** – **Note: This will delete the template completely.**
 - SAVE AND RETURN TO REQUEST** – When you click this it will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

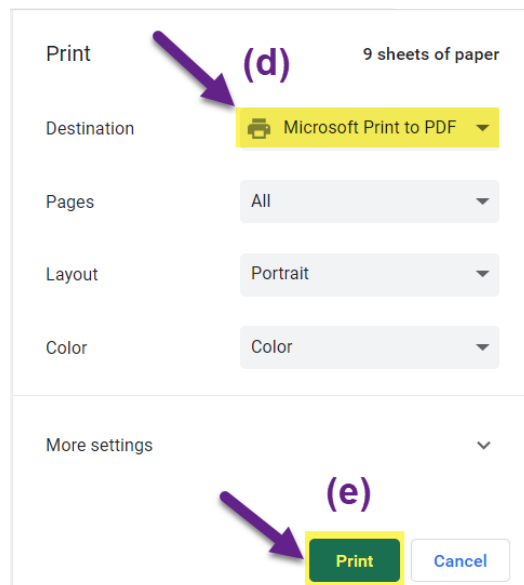
7. **AFTER YOU SUBMIT YOUR REQUEST**, you can come back to the Study template and can **print your study template to a PDF** (you can use it to submit to IRB), just
- Click the Study button** on the top navigation.
 - Click the VIEW PRINT FRIENDLY button** in the upper right-hand side of the screen.



- 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

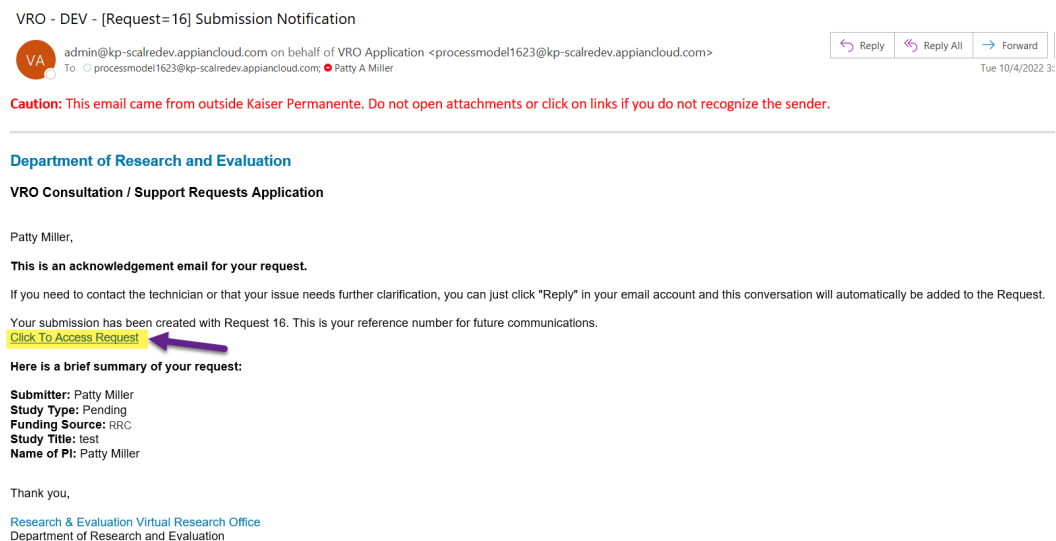
Notes

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.

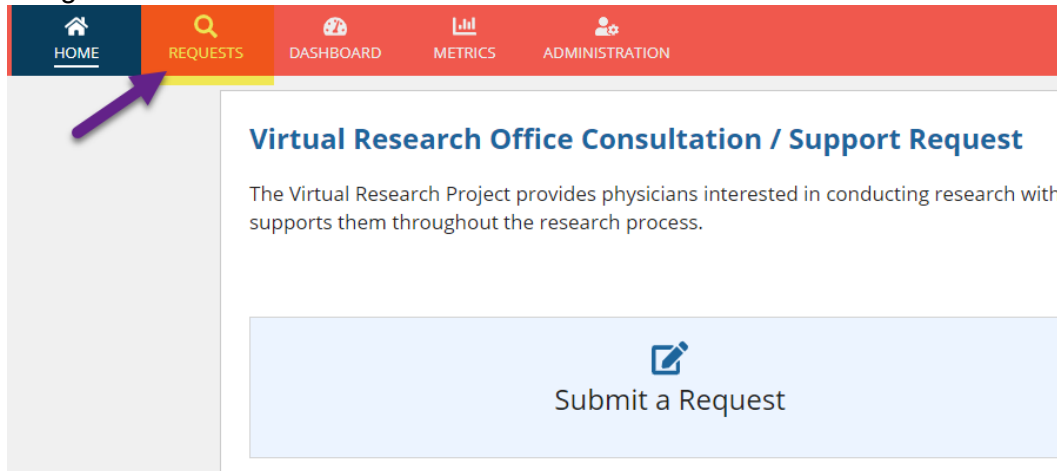
Note: You can also reply to this email just do not change the “To” field and the “Subject” field and the person managing your request will get the email.



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

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.

VRO - DEV - [Request=16] Submission Notification

admin@kp-scalredev.appiancloud.com on behalf of VRO Application <processmodel1623@kp-scalredev.appiancloud.com>
To: processmodel1623@kp-scalredev.appiancloud.com; Patty A Miller

[Reply](#) [Reply All](#) [Forward](#) Tue 10/4/2022 3

You forwarded this message on 10/6/2022 9:00 AM.

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:
Study Title: test
Name of PI: Patty Miller

Thank you,

[Research & Evaluation Virtual Research Office](#)
Department of Research and Evaluation

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.**

HOME REQUESTS DASHBOARD METRICS ADMINISTRATION VRO C

Request #16

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

Request Summary

General Information

Submitter Patty Miller	Today's Date October 04, 2022
Submitter Email Patty.A.Miller@kp.org	Request Status Ready To Be Assigned
Submitter Division / Unit Program Management Office	Request Type Pre-IRB Internal: Research Medical Education

History

ResEval-PMO-Group@kp.org	10/6/2022 4:05 PM PDT	
Patty.A.Miller@kp.org	10/6/2022 4:02 PM PDT	

To: reseval-pmo-group@kp.org; processmodel1623@kp-scalredev.appiancloud.com
Subject: FW: VRO - DEV - [RequestID=16] - TESTING NEW FORMATTING

Title of Email
bla...bla.. icon

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 *

EDIT

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

Outcome(s)

Outcome #1

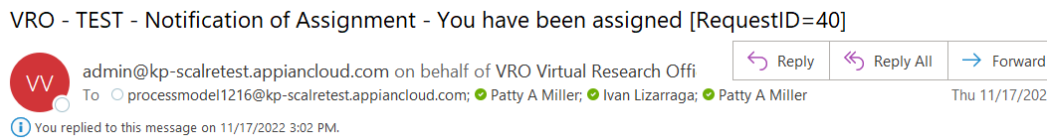
OPEN

Managing a Request



1. You will receive an email if the PI Navigator or the Biostat Research Manager assigns a request to you.

To access the request to begin managing it, **click on “Click To Access Request” link.**



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.A.Miller@kp.org,

You have been assigned a new Virtual Research Office project. Here's a link to the request: [Click To Access Request](#)

Here is a brief summary of the request:

Submitter: Patty Miller

Study Type: No

Study Title: test

Name of PI: Patty Miller

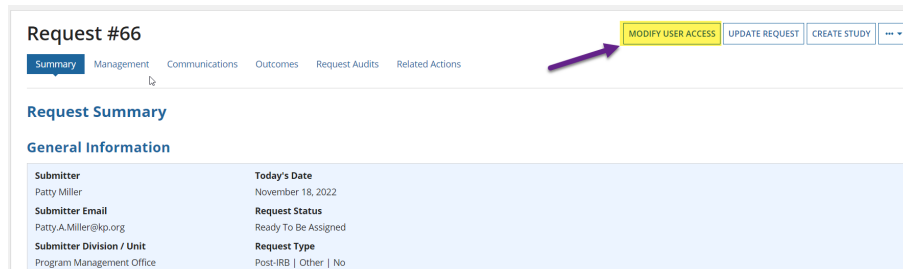
Thank you,

Research & Evaluation Virtual Research Office

Summary Actions



- **Modify User Access** – To allow other individuals to access the request,
 1. Click on the **MODIFY USER ACCESS** button.



Request #66

Summary Management Communications Outcomes Request Audits Related Actions

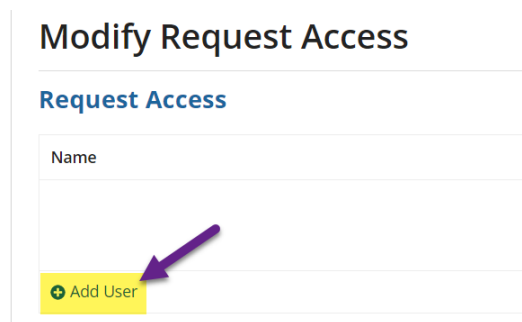
MODIFY USER ACCESS UPDATE REQUEST CREATE STUDY ...

Request Summary

General Information

Submitter Patty Miller	Today's Date November 18, 2022
Submitter Email Patty.A.Miller@kp.org	Request Status Ready To Be Assigned
Submitter Division / Unit Program Management Office	Request Type Post-IRB Other No

2. Click “Add User”



Modify Request Access

Request Access

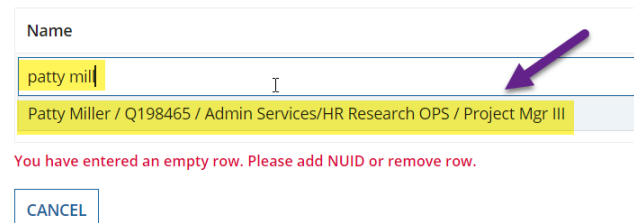
Name

Add User

3. Start typing the name in the box, then select the person you want to add.

Modify Request Access

▲ Request Access



Name

patty mill

Patty Miller / Q198465 / Admin Services/HR Research OPS / Project Mgr III

You have entered an empty row. Please add NUID or remove row.

CANCEL

- **Update Request** – As you acquire more information you may want to update the original information. To update the various fields in the request or study template
 1. Click the **“UPDATE REQUEST”** button.



Request #66

Summary Management Communications Outcomes Request Audits Related Actions

Request Summary

General Information

Submitter Patty Miller	Today's Date November 18, 2022
Submitter Email Patty.A.Miller@kp.org	Request Status Ready To Be Assigned
Submitter Division / Unit Program Management Office	Request Type Post-IRB Other No

2. The fields will open for editing, **just change, or add any information to each field as necessary.**

Request Details

General

What is the best contact phone number?

666-999-8888

What is the best email if not listed?

patty.a |

What is the PI's current affiliation?

Physician

- **Create or Discard Study** – If the user did not create a study protocol using the template you can help them by creating one. On the other hand, if the user did create a study protocol using the template you can discard it.
 1. To create a new protocol using the study template, Click **“CREATE STUDY”** button.



Request #66

Summary Management Communications Outcomes Request Audits Related Actions

Request Summary

General Information

Submitter Patty Miller	Today's Date November 18, 2022
Submitter Email Patty.A.Miller@kp.org	Request Status Ready To Be Assigned
Submitter Division / Unit Program Management Office	Request Type Post-IRB Other No

2. Fill out the fields in the template.

Study Template

General

What is the title of your study? ⓘ*
testing duplicates when updating

Background and Significance

What is the significance of this scientific question? In short, why is it important and why do we care about the answer to this question?

Be sure to conduct a thorough literature search to make sure the question hasn't already been addressed, or if it has been addressed, in what ways does your study add to what's already known? What limitations to earlier studies can you improve upon with your study?

What is the public health importance of the question?

3. If a study protocol is already created using the template and you want to discard it, Click “Discard Study Template”.

Request #66

Summary Study Management Communications Outcomes Request Audits Related Actions

MODIFY USER ACCESS UPDATE REQUEST ASSIGN REQUEST ...

Discard Study Template

Request Summary

General Information

Submitter Patty Miller Submitter Email Patty.A.Miller@kp.org	Today's Date November 18, 2022 Request Status Ready To Be Assigned
---	---

4. Add a reason for discarding and Click “Yes” to proceed. Click “No” if you change your mind.

Request #66

Summary Study Management Communications Outcomes Request Audits Related Actions

Confirm you wish to delete this study template?

Please provide reason *

I created it by accident.

25/2000

NO YES


5. Click “DONE” to go back to the summary page.

Request #66

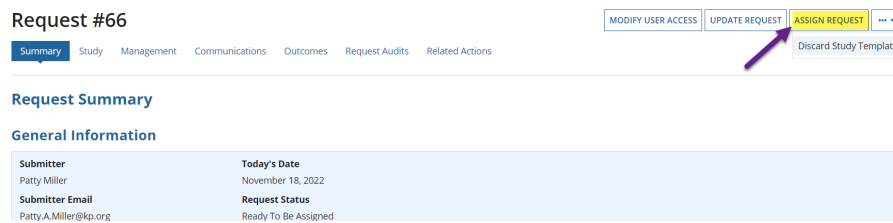
Summary Study Management Communications Outcomes Request Audits Related Actions

Study Template has been discarded.

DONE

- **Assign Request** – To assign or re-assign the management of the request or project to another person just 

1. Click the “ASSIGN REQUEST” button.



Request #66

Summary Study Management Communications Outcomes Request Audits Related Actions

MODIFY USER ACCESS UPDATE REQUEST **ASSIGN REQUEST** ...

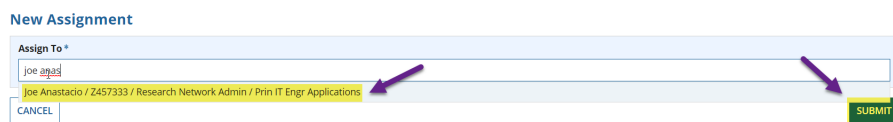
Discard Study Template

Request Summary

General Information

Submitter Patty Miller	Today's Date November 18, 2022
Submitter Email Patty.A.Miller@kp.org	Request Status Ready To Be Assigned

2. Search for the user, Select their name then Click “SUBMIT” button.



New Assignment

Assign To *

joe anastacio

joe Anastacio / Z457333 / Research Network Admin / Prin IT Engr Applications

CANCEL SUBMIT

Management Actions



- **Add Tasks** – To assign tasks to other people just
 1. Click on the “ADD TASK” button.

Request #66

Summary Management Communications Outcomes Request Audits Related Actions

ADD TASK HOLD REQUEST CANCEL REQUEST ...

General Information

Submitter Patty Miller	Today's Date November 18, 2022	Project Request Name testing duplicates when updating	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

2. **Select a Task Template** if applicable. This will automatically fill in the Title, Status, Description and Task Type.

Note: You can add these fields manually if not using a task template.

Request #66

Summary Management Communications Outcomes Request Audits Related Actions

New Task

Task Template: Consultation - External

Status: Open

Title: Consultation Project Aimed for External Funding

Description: This is a consultation project that seeks funding through an external source.

Search for Project: Search by project by PI, Title or ProjectID

Job ID: -- Select Job ID --

Scheduled Start: mm/dd/yyyy

Scheduled End: mm/dd/yyyy

* Owner: -- Search By Name or NUID --

Task Type: Consultation External

Supporting Document

UPLOAD Drop files here

3. **Search for a project then select it.**

Search for Project: rng11413

Job ID: RNG114139 / Annette L. Adams

Scheduled Start: RNG114135 / Robert M. Cooper

Scheduled End: RNG114132 / Richard M. Green

RNG114136 / Bill Towner

4. Once the project is selected it will bring up a list of jobs. (a) **Select the Job ID**, (b, c) **add the Scheduled Start and End dates** and (d) **Select the Owner's name** of the task.

Search for Project: RNG114139 / Annette L. Adams

Job ID: j9867-0051335 (a)

Scheduled Start: 11/22/2022 (b)

Scheduled End: 04/28/2023 (c)

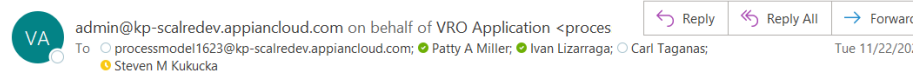
* Owner: Patty Miller / Q198465 (d)

Task Type: Consultation External

- Upload any supporting documents if applicable by either **Clicking the “UPLOAD” button or dragging and dropping the file into the box.** Click **“ADD TASK”** to add the task or **“CANCEL”** if you change your mind.

- The task recipient will receive an email letting them know they have a task. They need to **Click on the link** to access the task.

VRO - DEV - Notification of Assignment - You have been assigned a task for [RequestID=66]



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 task for the testing duplicates when updating. Here's a link to the Task: [Click To Access Task](#)

Here is a brief summary of the task:

Title: Consultation Project Aimed for External Funding

Description: This is a consultation project that seeks funding through an external source.

Job Id: J9867-0051335

Scheduled Start Dates: 11/22/2022

Task Type: Consultation External

Thank you,

Research & Evaluation Virtual Research Office

- Hold Request** – To put the request on pause so it's not being worked on.



- Click on the **“HOLD REQUEST”** button.

Submitter	Today's Date	Project Request Name	PI Name
Patty Miller	November 18, 2022	testing duplicates when updating	Patty Miller
Submitter Email	Request Status	Assigned To	PI Email
Patty.A.Miller@kp.org	Ready To Be Assigned	Patty Miller	Patty.A.Miller@kp.org

2. **Add the reason** you are putting the request on hold and **Click “YES” to continue** or **“No” if you change your mind.**

Request #66

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

Confirm that request will be placed On Hold.

Please provide reason *

We are short resources currently and will resume when we are able.

66/2000

NO YES

3. To resume an On Hold request, **Click “RESUME ON HOLD REQUEST”**.

Request #66

ADD TASK CANCEL REQUEST **RESUME ON HOLD REQUEST** ...

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

General Information

Submitter Patty Miller	Today's Date November 18, 2022	Project Request Name testing duplicates when updating	PI Name Patty Miller
Submitter Email Patty.A.Miller@kp.org	Request Status On Hold	Assigned To Patty Miller	PI Email Patty.A.Miller@kp.org

4. **Add the reason** you are taking the request on hold and **Click “YES” to continue** or **“No” if you change your mind.**

Confirm that Request will be released from On Hold

Please provide reason *

Resources are now available to work on this request.

52/2000

NO YES

5. **Click “Done”** to return to the management screen.

Request #66

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

Your Update has been saved.

DONE

- **Cancel Request** – To cancel a request that will not move forward, or circumstances have changed, and it is no longer needed. ↑

1. Click on the “CANCEL REQUEST” button.

Request #66

Summary Management Communications Outcomes Request Audits Related Actions

ADD TASK HOLD REQUEST CANCEL REQUEST ...

General Information

Submitter Patty Miller	Today's Date November 18, 2022	Project Request Name testing duplicates when updating	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

2. Add the reason you are cancelling the request on hold and Click “YES” to continue or “No” if you change your mind.

Request #66

Summary Management Communications Outcomes Request Audits Related Actions

Confirm that request will be Cancelled.

Please provide reason *

Project not moving forward.

27/2000

NO YES

3. Click “Done” to return to the management screen.

Request #66

Summary Management Communications Outcomes Request Audits Related Actions

Request has been cancelled.

DONE

4. If you made a mistake and need to resume a cancelled request, Click “UNCANCEL REQUEST”.

Request #66

Summary Management Communications Outcomes Request Audits Related Actions

ADD TASK UNCANCEL REQUEST UPDATE MANAGEMENT ...

General Information

Submitter Patty Miller	Today's Date November 18, 2022	Project Request Name testing duplicates when updating	PI Name Patty Miller
Submitter Email Patty.A.Miller@kp.org	Request Status Cancelled	Assigned To Patty Miller	PI Email Patty.A.Miller@kp.org

5. **Add the reason you are not cancelling and Click “Yes” or “No” if you change your mind.**

Request #66

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

Please provide reason *

Project is proceeding again.

28/2000

NO YES

6. **Click “Done” to return to the management screen.**

Request #66

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

Your Update has been saved.

DONE

- **Update Management** – To update information on the project.



1. **Click “Update Management” button to update the project information for the request.**

Request #66

ADD TASK HOLD REQUEST CANCEL REQUEST ...

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

Update Management Assign Request

General Information

Submitter Patty Miller	Today's Date November 18, 2022	Project Request Name testing duplicates when updating	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

2. **Enter the information for the fields that are editable.**

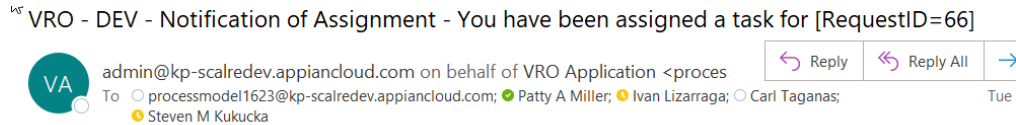
- (a) Change the Submitter name by **Clicking on the “x”** and **Search for a new name.**
- (b) **Enter the Start and End Dates**
- (c) **Add the Medical Center Investigator (MCI) folder location.**
- (d) If you do not want the 3-month reminder email to go out, **Click the checkbox for “Do not send 3-month email”.**
- (e) **Click “UPDATE”** to save the information or **“CANCEL”** if you change your mind.

Worklogs



For those employees that are managing tasks, they will need to add a Worklog to close the task out.

1. Click the link in the task email sent you.



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 task for the testing duplicates when updating. Here's a link to the Task: [Click To Access Task](#)

Here is a brief summary of the task:

Title: Consultation Project Aimed for External Funding

Description: This is a consultation project that seeks funding through an external source.

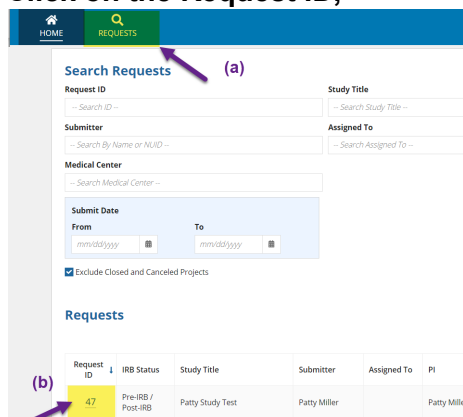
Job ID: J9867-0051335

Scheduled Start Dates: 11/22/2022

Task Type: Consultation External

OR if you are in Appian already,

- (a) Click “REQUESTS” in upper navigation,
- (b) Click on the Request ID,



(c) Click the “Management” link once in the record

Request #46 (c) ADD TASK HOLD REQUEST CANCEL REQUEST ...

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

General Information

Submitter Patty Miller	Today's Date November 21, 2022	Project Request Name Patty Test Study	PI Name Joe Anastacio
Submitter Email Patty.A.Miller@kp.org	Request Status Assigned	Assigned To Patty Miller	PI Email Joe.X.Anastacio@kp.org
Submitter Division / Unit Program Management Office	Request Type Post-IRB Internal: RRC No	Start Date End Date MCI Folder None Listed	Medical Center Regional Offices - Pasadena Department Research Network Admin <input type="checkbox"/> Do not send 3 month email

Task Details

Title	Status	Owner	Type	Scheduled Start	Scheduled End
Consultation Project Aimed for External Funding	Open	Patty Miller	Consultation External	11/23/2022	2/3/2023

(d) Click on the task title

Request #46 ADD TASK HOLD REQUEST CANCEL REQUEST ...

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

General Information

Submitter Patty Miller	Today's Date November 21, 2022	Project Request Name Patty Test Study	PI Name Joe Anastacio
Submitter Email Patty.A.Miller@kp.org	Request Status Assigned	Assigned To Patty Miller	PI Email Joe.X.Anastacio@kp.org
Submitter Division / Unit Program Management Office	Request Type Post-IRB Internal: RRC No	Start Date End Date MCI Folder None Listed	Medical Center Regional Offices - Pasadena Department Research Network Admin <input type="checkbox"/> Do not send 3 month email

Task Details

Title	Status	Owner	Type	Scheduled Start	Scheduled End
Consultation Project Aimed for External Funding	Open	Patty Miller	Consultation External	11/23/2022	2/3/2023

2. Once in the task, Click “ADD WORK LOG”

Consultation Project Aimed for External Funding UPDATE ADD WORK LOG

Summary Related Actions

Consultation Project Aimed for External Funding
Patty Miller

Description This is a consultation project that seeks funding through an external source.

Job ID J9867-0051335

Scheduled Start Nov 22, 2022

Scheduled End Apr 28, 2023

Status Open

Owner Patty Miller

Task Type Consultation External

3. Fill in all the information and Click “Add” to add the worklog.

Note: The fields highlighted in orange are automatically pulled in from timesheet data from TERMS. If they are incorrect, you can manually change the information.

Consultation Project Aimed for External Funding

Summary Related Actions

* Owner Patty Miller / Q198465 X

* Work Log Type Monthly Update

Description test description

Job ID DEFAULT

Pay Period Start 09/18/2022

Last 2 Pay Period Hours 152

Pay Period End 10/15/2022

PI Name Joe Anastacio

Overall Hours 1456

CANCEL ADD

4. Click “DONE” button to take you back to the task.

Consultation Project Aimed for External Funding

Summary Related Actions

Work Log Created.

DONE

5. After adding your worklog, to close a task click “UPDATE” button on the top right of the task.

Consultation Project Aimed for External Funding

Summary Related Actions

UPDATE ADD WORK LOG

Consultation Project Aimed for External Funding

Patty Miller

Description This is a consultation project that seeks funding through an external source.

Job ID DEFAULT

Scheduled Start Nov 23, 2022

Scheduled End Feb 3, 2023

Status Open

Owner Patty Miller

Task Type Consultation External

6. Change the status to “Closed” and Click “UPDATE” button.

Consultation Project Aimed for External Funding

[Summary](#)[Related Actions](#)

Consultation Project Aimed for External Funding

Patty Miller

Description This is a consultation project that seeks funding through an external source.

Search for Project: ADM000133 / Annie X. Chen ✕

Job ID DEFAULT

Scheduled Start 11/23/2022

Scheduled End 02/03/2023

Status Open

Owner Open

Task Type On Hold

Cancelled

Supporting Document

UPLOAD

Drop files here

CANCEL

UPDATE

Close a Request



Once all consultation / support work has been completed on a project, you will have the ability to close the request.

1. From the Management Tab in a request, Click **“Close Request”** button on the top right.

The screenshot shows the 'Request #46' interface with the 'Management' tab selected. In the top right corner, there are buttons for 'ADD TASK', 'HOLD REQUEST', and 'CANCEL REQUEST', along with a dropdown menu. The dropdown menu is open, showing options: 'Update Management', 'Assign Request', and 'Close Request'. The 'Close Request' option is highlighted in yellow. Below the tabs, there is a 'General Information' section with a table of details.

General Information	
Submitter Patty Miller	Today's Date November 21, 2022
Submitter Email Patty.A.Miller@kp.org	Request Status Pending Outcome
Submitter Division / Unit Program Management Office	Request Type Post-IRB Internal: RRC No
Project Request Name Patty Test Study	Assigned To Patty Miller
PI Name Joe Anastacio	Start Date Nov 23, 2022
PI Email Joe.X.Anastacio@kp.org	End Date Nov 30, 2022
Medical Center Regional Offices - Pasadena	

2. Provide reason and Click **“YES”** button or “No” button if you change your mind.



The screenshot shows the 'Request #46' interface with the 'Related Actions' tab selected. The main heading is 'Confirm that request will be Closed.' Below this, there is a text input field with the placeholder 'Please provide reason *'. The input field contains the text 'All requirements and tasks for the consultation / support are complete.' Below the input field, there are two buttons: 'NO' and 'YES'. The 'YES' button is highlighted in yellow.

3. Click **“DONE”** button to return to the management tab.

The screenshot shows the 'Request #46' interface with the 'Related Actions' tab selected. The main heading is 'Request has been closed.' Below this, there is a text input field. At the bottom right, there is a yellow button labeled 'DONE'.

Note: Once you close a request / project, it will not automatically be seen in the search results. Click the checkbox off to see those requests.

Search Requests

Request ID	S
<input type="text" value="-- Search ID --"/>	<input type="text"/>
Submitter	A
<input type="text" value="-- Search By Name or NUID --"/>	<input type="text"/>
Medical Center	
<input type="text" value="-- Search Medical Center --"/>	
Submit Date	
From	To
<input type="text" value="mm/dd/yyyy"/> 	<input type="text" value="mm/dd/yyyy"/> 
<input type="checkbox"/> Exclude Closed and Canceled Projects	

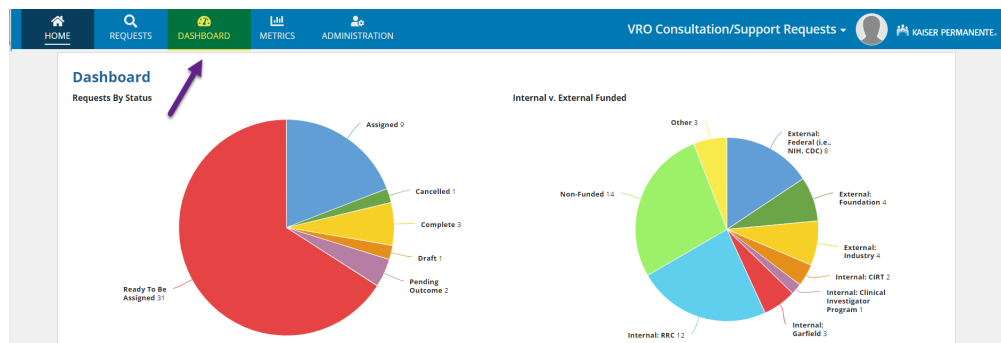
Dashboard and Metrics



Only certain employees will have access to the Dashboard and Metrics section. These sections are reserved for overall management of the Virtual Research Office.

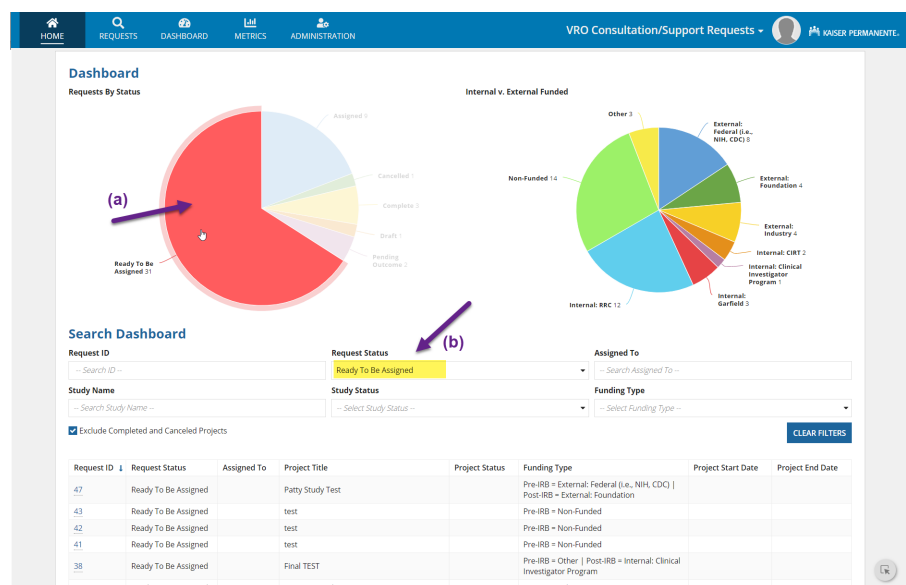
Dashboard

1. From the home page, **Click on Dashboard** to access this information. You'll be able to see **Requests by Status** and **Internal v. External Funded** requests.



- a. To see the list of projects for one status or funded type, you can either **Click on a piece of the pie chart** and the table will show all the requests related to what you selected.
- b. Or you can use the search filters to see what information you need to see.

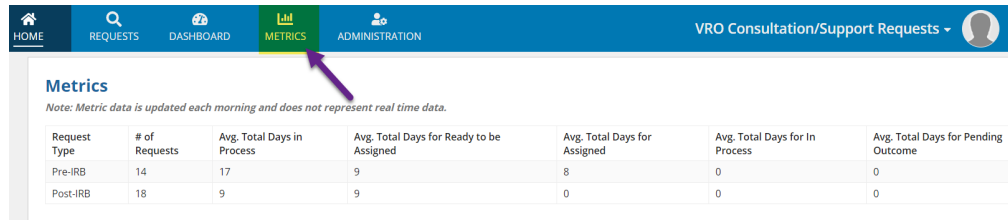
Note: Remember to use the “CLEAR FILTERS” button to select other criteria.



Metrics

1. To see the progress of the requests / projects, **click the Metrics tab in the upper navigation.**

Note: The metric data is updated each morning and does not represent real time data.



The screenshot shows the VRO Consultation/Support Requests app interface. The top navigation bar is blue and contains five tabs: HOME, REQUESTS, DASHBOARD, METRICS, and ADMINISTRATION. The METRICS tab is highlighted in green and has a purple arrow pointing to it. To the right of the navigation bar, the text 'VRO Consultation/Support Requests' is displayed next to a user profile icon. Below the navigation bar, the 'Metrics' section is visible, featuring a table with request metrics.

Request Type	# of Requests	Avg. Total Days in Process	Avg. Total Days for Ready to be Assigned	Avg. Total Days for Assigned	Avg. Total Days for In Process	Avg. Total Days for Pending Outcome
Pre-IRB	14	17	9	8	0	0
Post-IRB	18	9	9	0	0	0

Administration



Only certain employees will have access to the Administration section. This section is reserved for management of user access.

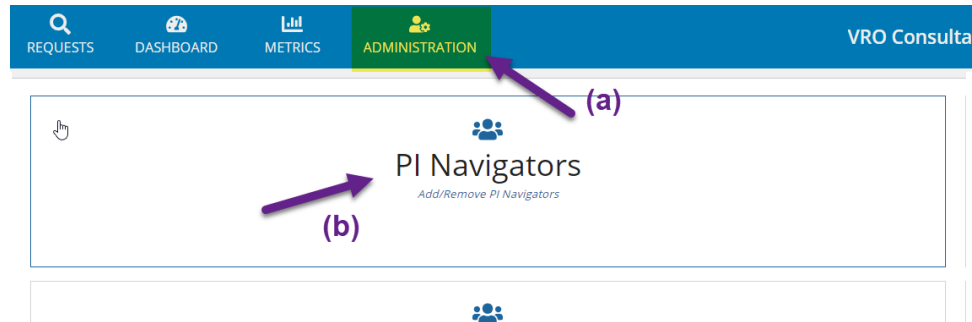
There are many different groups that can have access in this application.

Note: CIRT = Care Improvement Research Team, GME = Graduate Medical Education, IRB = Institutional Review Board, Regional RRC = Research Committee, SOM = School of Medicine,

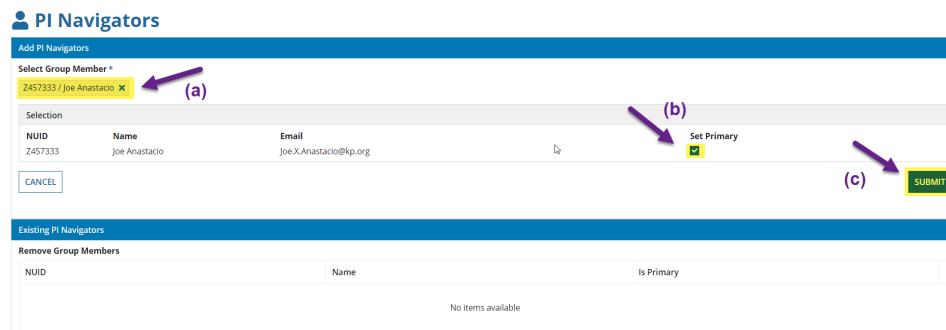
1. **PI Navigators** – The Primary PI Navigator will be auto-assigned for any Pre-IRB and NOT GME or RRC, OR If Post-IRB NOT RRC and CIRT requests. They get emails for all submissions regardless if they are assigned or not. The email body will indicate if they are assigned.
2. **RRC Users** – Any requests that are Pre- or Post-IRB RRC requests, these users will get an email and will have access to these requests.
3. **Biostat Research Manager** – This is the primary person who will get assigned Pre- and Post-IRB RRC requests. They get emails for all submissions regardless if they are assigned or not. The email body will indicate if they are assigned.
4. **Non-RRC Users** – Any requests that are NOT RRC or CIRT, these users will get an email and will have access to these requests.
5. **GME Users** – These are the primary people who will get assigned Pre-IRB GME requests. They get emails for all GME submissions regardless if they are Pre- or Post-IRB. The email body will indicate if they are Pre-IRB, GME and assigned.
6. **SPA Users** – Any requests that indicate that the PI is doing externally funded outside activities, these users will get an email and will have access to these requests. SPA users have read-only access to all requests.
7. **SOM Users** - Any requests that are SOM related, these users will get an email and will have access to these requests.
8. **Management** – These users will have access to the Dashboard and Metrics.
9. **CIRT Users** - Any requests that are CIRT related, these users will get an email and will have access to these requests.
10. **Application Admin Users** – These users will have access to manage all other group's (listed above) access. IT and Superusers will need to add other users to this group. Please submit a [Help Desk ticket](#) to get an application admin added.

How to add / remove users

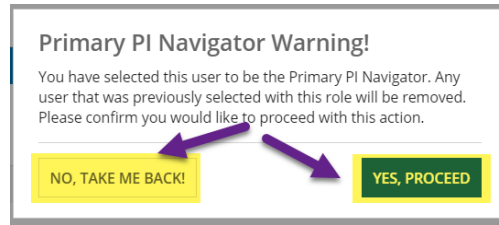
1. To add or remove a user,
 - a. Click on the **Administration** link in the top navigation then
 - b. Click on the **box** of the group you'd like to add a user.



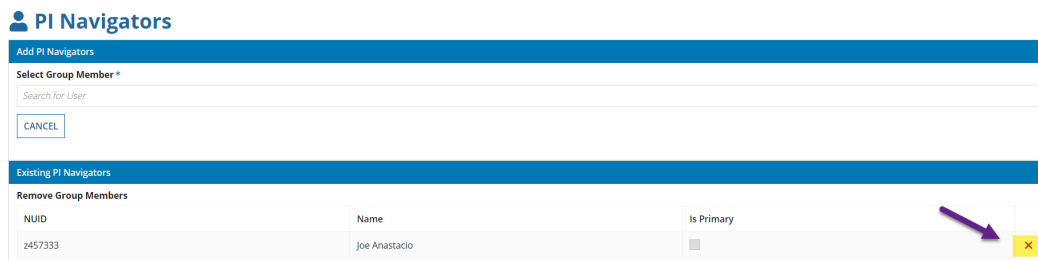
2. Add a person or multiple people
 - a. Search and select the name of the person you would like to add.
 - b. If “Set Primary” is an option, Select it if the person is the primary person responsible for the request. For instance, Jeff Slezak would be the primary person who would be the PI Navigator and request would be auto assigned to him, but there may be others that need to be alerted.
 - c. Click “SUBMIT” button to save the permissions, or “CANCEL” if you change your mind.



- d. You will get an alert if a Primary person already exists. Click **“YES, PROCEED”** if you would like to over ride the current Primary person or **“NO, TAKE ME BACK!”** to cancel the change.



3. Once a person is added, you can see them in the list of Existing PI Navigators. To remove them, Click the **“X”** on the right side of their name. They will automatically be removed.













Email Notifications





This is a list of emails that should be going out during the VRO request process.

1. After submission and before someone is assigned to the record.

VRO - DEV - Notification of Submission - Your Virtual Research Office request has been logged with [RequestID=66] Submission Notification

 admin@kp-scalredev.apiancloud.com on behalf of VRO Virtual Research Office App - DEV <processmodel1623@kp-scalredev.apiancloud.com>
To:  processmodel1623@kp-scalredev.apiancloud.com;  Patty A Miller;  Ivan Lizarraga;  Carl Taganas;  Steven M Kukucka
Cc:  Ivan Lizarraga;  Carl Taganas;  Steven M Kukucka;  Patty A Miller

 Reply  Reply

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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 66. 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: No
Funding Source: Non-Funded
Study Title: testing duplicates when updating
Name of PI: Patty Miller
Auto-Assigned To: Patty Miller
IRB Status: Pre-IRB



Thank you,

Research & Evaluation Virtual Research Office
Department of Research and Evaluation

2. When Post-IRB information is completed after Pre-IRB.

VRO - TEST - Notification of Submission - Your Virtual Research Office request has been updated with [RequestID=18]

 admin@kp-scalretest.apiancloud.com on behalf of VRO Virtual Research Office App <processmodel1216@kp-scalretest.apiancloud.com>
To:  processmodel1216@kp-scalretest.apiancloud.com;  Cheng-wei Huang;  Ivan Lizarraga;  Patty A Miller
Cc:  Jiaxiao M. Shi;  Ivan Lizarraga;  Patty A Miller

 Reply  Reply

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Department of Research and Evaluation

VRO Consultation / Support Requests Application

Cheng-Wei Huang,

This is to acknowledge that Post-IRB information has been added to the Pre-IRB 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 updated with Request 18. This is your reference number for future communications.
[Click To Access Request](#)

3. When assignor assigns the request.

VRO - TEST - Notification of Assignment - You have been assigned [RequestID=40]



admin@kp-scalretest.appiancloud.com on behalf of VRO Virtual Research Office App - TEST <processmodel121
To: ○ processmodel1216@kp-scalretest.appiancloud.com; ● Patty A Miller; ○ Ivan Lizarraga; ● Patty A Miller

You replied to this message on 11/17/2022 3:02 PM.

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Department of Research and Evaluation

VRO Consultation / Support Requests Application

Patty.A.Miller@kp.org,

You have been assigned a new Virtual Research Office project. Here's a link to the request: [Click To Access Request](#)

Here is a brief summary of the request:

Submitter: Patty Miller

Study Type: No

Study Title: test

Name of PI: Patty Miller

4. When the assignor assigns a task

VRO - TEST - Notification of Assignment - You have been assigned a task for [RequestID=40]



admin@kp-scalretest.appiancloud.com on behalf of VRO Application <processmodel1216@kp-scalretest.appia
To: ○ processmodel1216@kp-scalretest.appiancloud.com; ● Patty A Miller; ○ Ivan Lizarraga; ● Patty A Miller

Caution: This email came from outside Kaiser Permanente. Do not open attachments or click on links if yo

Department of Research and Evaluation

VRO Consultation / Support Requests Application

Patty Miller,

You have been assigned a task for the test. Here's a link to the Task: [Click To Access Task](#)

Here is a brief summary of the task:

Title: Consultation Project Aimed for RRC Funding

Description: This is a consultation project that seeks funding through the Regional Research Committee (RRC).

Job Id: COVID-19

Scheduled Start Dates: 11/17/2022

Task Type: Consultation RRC

5. Reminder that the task hasn't been completed by End Due Date.

add screenshot

6. After "Outcome Pending" is selected for the status, an email goes out for Post-IRB, Non-funded studies asking for an update to the request.

VRO - TEST - Update Notification - Request for an update for [RequestID=44]



admin@kp-scalretest.appiancloud.com on behalf of VRO Virtual Research Office App <prc
To ○ processmodel1216@kp-scalretest.appiancloud.com; ● Patty A Miller; ○ Ivan Lizarraga

Caution: This email came from outside Kaiser Permanente. Do not open attachments or

Department of Research and Evaluation

VRO Consultation / Support Requests Application

Patty Miller,

Please let us know if you have any updates to the following project: [Click To Access Project](#)

Request number: 44

Study Title: testing final final issues

Name of PI: Patty Miller

- One year after “Outcome Pending” is selected for the status, an email goes out reminding the submitter / PI that they need to add an Outcome.

VRO - TEST - Outcome Notification - Request to fill out Outcome Form for [RequestID=44]



admin@kp-scalretest.appiancloud.com on behalf of VRO Virtual Research Office App <processmodel1216@
To: ○ processmodel1216@kp-scalretest.appiancloud.com; ● Patty A Miller; ○ Ivan Lizarraga

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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 Project](#)

Request number: 44

Study Title: testing final final issues

Name of PI: Patty Miller

- Submitter / PI adds an Outcome

VRO - TEST - Outcome Notification - Request to fill out Outcome form for [RequestID=44]



admin@kp-scalretest.appiancloud.com on behalf of VRO Virtual Research Office App <processmodel1216@
To: ○ processmodel1216@kp-scalretest.appiancloud.com; ● Patty A Miller; ○ Ivan Lizarraga

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Patty Miller,

This is an acknowledgement email for your outcome submission.

You have submitted a new outcome for your project. [Click To Access Project](#)

Request Number: 44

Study Title: testing final final issues

Name of PI: Patty Miller

- When the assignee updates the request to On Hold

VRO - DEV - Request Notification - [RequestID=66] has been put On Hold



admin@kp-scalredev.appiancloud.com on behalf of Virtual Research Office A

To: processmodel1623@kp-scalredev.appiancloud.com; Patty A Miller; Ivan Lizarraga; Carl Taganas;
Steven M Kukucka

Reply Reply All Forward ...

Tue 11/22/2022 3:28 P

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VRO Consultation / Support Requests Application

Patty Miller,

Your Request # 66 in the Virtual Research Office has been put **On Hold**. To view the On Hold request, please visit the form here: [Click To Access Request](#)

Study Title: testing duplicates when updating

Name of PI: Patty Miller

10. When the assignee cancels the request.

VRO - DEV - Request Notification - [RequestID=66] has been Cancelled



admin@kp-scalredev.appiancloud.com on behalf of VRO Virtual Research Offi

To: processmodel1623@kp-scalredev.appiancloud.com; Patty A Miller; Ivan Lizarraga; Carl Taganas;
Steven M Kukucka
Cc: Ivan Lizarraga; Carl Taganas; Steven M Kukucka; Patty A Miller

Reply Reply All Forward ...

Tue 11/22/2022 3:57 PM

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VRO Consultation / Support Requests Application

Patty Miller,

Your Request # 66 in the Virtual Research Office has been **cancelled**. To view the cancelled request, please visit the form here: [Click To Access Request](#)

Study Title: testing duplicates when updating

Name of PI: Patty Miller

11. When the assignee closes the request.

VRO - TEST - Request Notification - [RequestID=46] has been Closed



admin@kp-scalretest.appiancloud.com on behalf of VRO Virtual Research Offi

To processmodel1216@kp-scalretest.appiancloud.com; ● Patty A Miller; ○ Ivan Lizarraga

Cc ● Patty A Miller; ○ Ivan Lizarraga

Reply	Reply All	Forward	•
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Wed 11/23/2022 10:28

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VRO Consultation / Support Requests Application

Patty Miller / Joe Anastacio,

Your Request # 46 in the Virtual Research Office has been **Closed**. To view the closed request, please visit the form here: [Click To Access Request](#)

Study Title: Patty Test Study

Name of PI: Joe Anastacio

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](#).