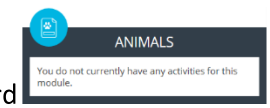
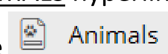
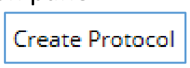
1. Open a web browser
   Insight4 is adapted to work in the following environments: Microsoft Edge or Chrome for Windows; Safari 13.0+ or Chrome for OS X.
2. Go to Insight 4.0: https://insight4.partners.org/
3. Enter your Mass General Brigham username and password to login to Insight 4.0
   If you are already logged into the Mass General Brigham network or connected via VPN, you may not have to enter your username and password again due to the Okta single sign on.
4. Click on the ANIMALS hyperlink in the Dashboard 

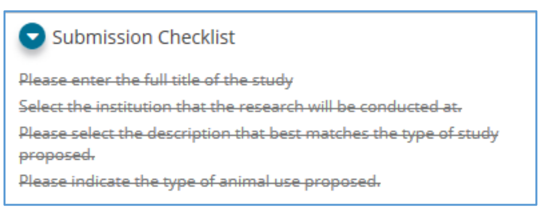
   or the link in the Left Navigation pane 

   , to expand the Animals module options
5. Click the 

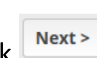
   button in the Left Navigation pane

Forms

6. Complete the Initial Survey (a.k.a. gating form) questions, which includes the study title, the institution the research will be completed at[1] and the type of research to be conducted – live animals, tissue or blood products only[2].
   Each item on the Submission Checklist – found in the Right Navigation Pane – gets crossed off as you complete the corresponding field on the gating form.



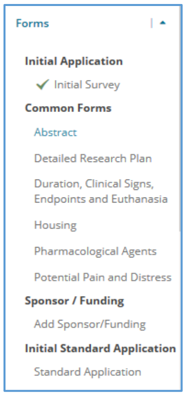
7. Click the 

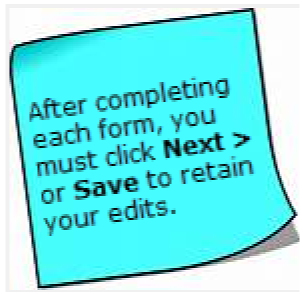
   button.
8. Complete the questions on the form presented, then click 

   to complete the questions on the next form.
   As you navigate from one form to the next, your edits are automatically being saved in Insight. You can also navigate through the process by clicking each form name – found in the Left Navigation pane – to complete the questions. You cannot submit until all required forms are satisfactorily completed.

Note: Tissue protocol forms consist of the **Initial Survey** and **Tissue Application** and may include a **Hazardous Agent Administration and Use** form for NHP species and/or if tissue was treated.

[1] The location of the research to be conducted will trigger workflow components and PI requirements.
[2] The type of research to be conducted will trigger workflow components.



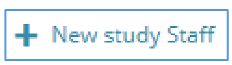


Upon completing the last form. click the **Next >** button to move to the Study Staff tab. Alternatively, click the **Study Staff** hyperlink in the Left Navigation pane.

Study Staff

9. Build the protocol staff list

Study Staff

a. Click the 

button to add a study staff member

b. Start typing the individual's name in the search box in **lastname, firstname** format

c. When a match is found, highlight the name and click the **Add** button

d. Select a **Role** for the study staff participant

e. Change the **Permission** type if the Role supports this action[3]

f. Complete the information requested on the **Personnel Activity** page—the **Qualifications and Experience** for the species and which procedures each individual will be responsible for performing and/or which anesthesia regimens each individual will be responsible for administering.
All forms listed must be assigned to at least one individual but not every individual has to have a form assigned.

Non-Study Staff

The creator of the protocol will appear by default in the Non-study Staff section of the Staff page. To move yourself from Non-study Staff to Staff click the "X" at the end of the row next to your name. Then click [OK] in response to the question, "Are you sure you want to delete {last

[3] Roles 'Principal Investigator', and 'Co-Investigator' by default are assigned Permission type 'Manage' and cannot be changed. All other Roles can be set to either 'Manage,' which allows the study staff to modify the protocol or 'View', which provides read only access.

name}, {first name}?" The entry will move up to the Study Staff section, complete items d. - f. above for yourself.

a. Click the 

button to add a non-study staff member

b. Start typing the individual's name in the search box in **lastname, firstname** format

c. When a match is found, highlight the name and click the **Add** button

d. Select the **Permission** type – View (default) or Manage[4]

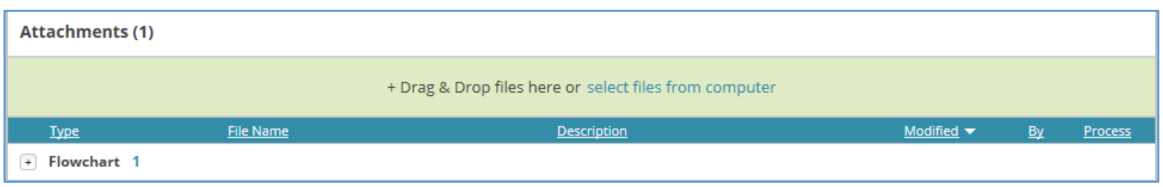
e. Add **Comments**, if desired

f. Check (✓) the **Contact** box if the non-study staff participant is to be notified when changes are made to the protocol

Click the **Next >** button to move to the Attachments tab. Alternatively, click the **Attachments** hyperlink in the Left Navigation pane.

<u>Attachments</u>

10. A list of required documents is displayed based on the answers given on form questions; at a minimum, a flowchart is required.
*Please note that flowcharts should only be added or removed in **section C** of the **Research Objectives** page, **<u>not via the Attachments tab</u>**. The flowchart entered on the Research Objectives page will display here, as illustrated below.*



11. Drag & drop files or select files from the computer

12. Select the attachment **Type**

If all **Forms**, **Study Staff**, and **Attachment** requirements have been fulfilled, the **Submit** button or **PI Checklist** should display in the Right Navigation pane.

<u>Submit</u>

13. If you are not the Principal Investigator you will see the Submit button. Click the **Submit** button. The protocol will then be routed to the Principal Investigator for review and signoff.

[4] 'Manage' allows the non-study staff participant to modify the protocol, 'View' provides read only access.

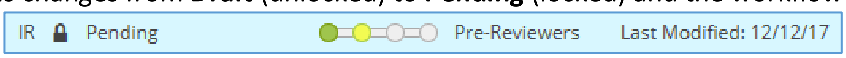
PI Certification

14. If you are the Principal Investigator you will see the PI Checklist.

15. Complete the **Occupational Health Survey** if it appears in the PI Checklist
16. Complete the **Principal Investigator Certification**
17. Click the 

button

The submission status changes from **Draft** (unlocked) to **Pending** (locked) and the workflow advances to **Pre-Reviewers**



[END]