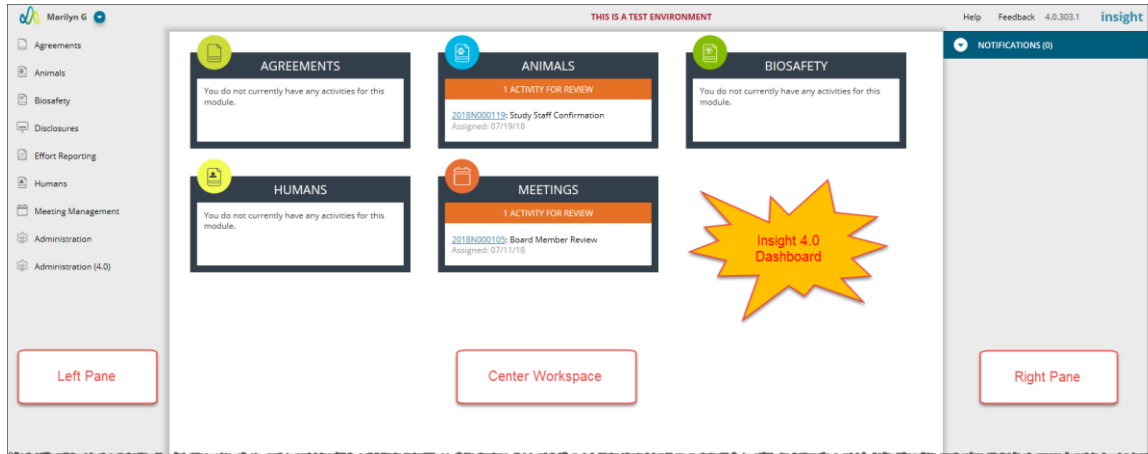


Submitting a Triennial Post Go-Live

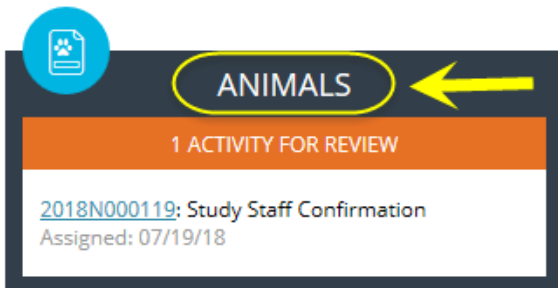
Log into Insight 4.0

1. Open an internet browser session
2. Enter the URL for Insight 4.0 (<https://insight.partners.org/public/>)
3. Enter your Partners UserName then click [Login]
4. Enter your Password then click [Log In]
5. Your Dashboard will display like that shown in the image below



Displaying Protocols

6. To display your protocols, click on the hyperlink at the top of the card in the **Center Workspace** of the **Dashboard**.



7. The default view is “Active,” which displays all approved, pending, and draft submissions you have access to. A search box will open in the **Center Workspace**.



8. Search for and open your protocol

Submitting a Triennial Post Go-Live

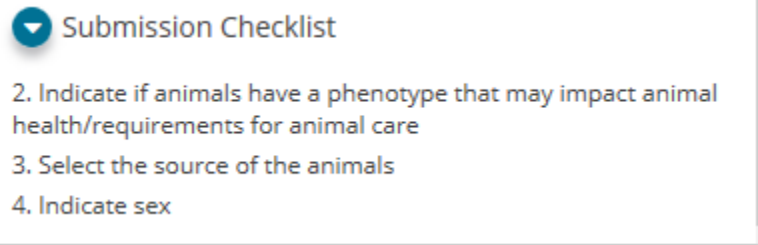
If you did not start your Triennial in 3.6.4, search for your *Active* protocol and open it.

9. Click **Create Triennial Review** (in the left pane under Actions)

If you began your Triennial in 3.6.4, search for a *Draft* or *Pending* Triennial submission associated with your *Active* protocol.

10. Any form, staff or related record within your submission with a failed validation will show with an exclamation mark (!), while a checkmark (✓) indicates no failed validation

11. The **Submission Checklist** for each component displays in the right pane; it will indicate what is missing



Submission Checklist

2. Indicate if animals have a phenotype that may impact animal health/requirements for animal care

3. Select the source of the animals

4. Indicate sex

12. Fulfill the requirements for each form with a failed validation (!) appearing in the

left pane. The Submission Checklist will indicate what is missing; click **Save** for each form when all validations have been fulfilled

13. Fulfill the requirements for any staff and/or related records with a failed validation (!) appearing in the left pane. The Submission Checklist will indicate what is missing

14. Once the validations of the Insight 4.0 system have been met, make the modifications needed for the Triennial Review, i.e., the study requirements for the next three years

15. When all validations have been met and modifications completed certify the submission as PI

16. Click **Submit**

17. The submission will follow the normal review and approval process

[END]