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Document Search allows you to easily see all documents that have been attached to active protocols in the following locations:

- PC Console > Documents/Info > Attachments/Links e.g. OCR Research Billing Compliance review documents
- IRB or PRMC Reviews (if the documents are marked as Released) e.g. IRB Approved Informed Consents
- PC Console > Institution > [institution] > Documents



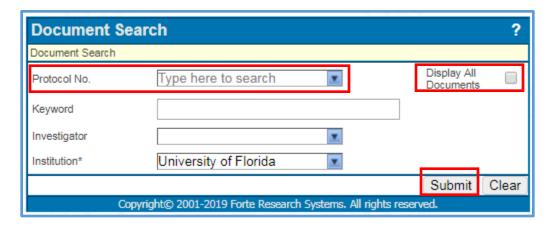
**NOTE:** Document Search only displays documents from active protocols, i.e. protocols with a status of **Open to Accrual**, **Closed to Accrual**, or **Suspended**.

Documents associated with inactive protocols cannot be found using Document Search.

For protocols that are in an inactive status (e.g. **New**), navigate to the **PC Console > Documents/Info > Attachments/Links** tab and/or the **IRB/PRMC Review** tabs to display associated documents.

## **CONDUCT A DOCUMENT SEARCH**

1. Navigate to Menu > Protocols > Document Search.



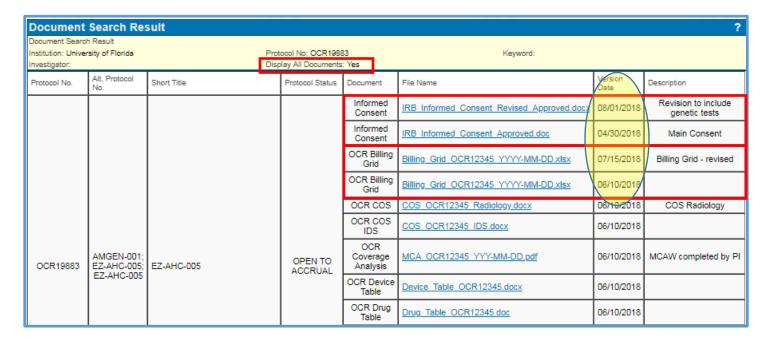
- 2. A pop-up window appears. Search criteria are entered into the pop-up window fields You can use any of the fields, alone or in combination, to narrow results. The fields include:
  - **Protocol No.** Enter one of the study identifiers used at UF (see Find Your Study for details).
  - **Keyword** If you don't know any of the study identifiers, entering a keyword (such as "train") will display protocols for which the word "train" appears in the Title, Short Title, or Objectives field.
  - **Investigator** If you don't know any of the study identifiers, entering the principal investigator name will display protocols for that investigator.
  - **Institution** This field is required and defaults to the institution to which your contact record is associated. You can only select institutions to which you have access.
  - **Display All Documents** By default, the Document Search Result page displays only the most recent version of each type of document attached to the protocols. If you want to see **ALL versions** of each document type, select this checkbox.
- 3. Click the [Submit] button.

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## **REVIEW THE DOCUMENT SEARCH RESULT**

By default, the Document Search Result page displays the most recent version of each type of document attached to the protocols. If the "Display All Documents" option was selected, the display will also include previous versions. If applicable, an Expiration Date will appear and will be red if that version of the document has expired.

Example of results with "**Display All Documents**" selected – Note that multiple versions of the Informed Consent and Billing Grid are showing:



Example of Document Search Result with "Display All Documents" NOT selected – Note that only the most recent versions of the Informed Consent and Billing Grid are showing:



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## Documents that **DO APPEAR** in the results include:

- Documents attached to IRB reviews that have the Released checkbox selected See <u>Document an IRB Review</u> for details.
- Documents attached to PRMC reviews that have the Released checkbox selected
- Documents uploaded to PC Console > Documents/Info
- Documents uploaded to PC Console > Institution > [institution] > Documents

## Documents that **DO NOT APPEAR** in the results include:

- Documents attached to tasks in a Task List
- Documents uploaded to the Coverage Analysis Console
- Documents uploaded to the Financials Console
- Documents uploaded to Subject Console > Documents/Info > Attachments
- Documents attached to an organization record (e.g. an institution, lab, or IRB)

Search results are limited by both your access and the scope of your permissions.