

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**.

The screenshot shows a web form titled 'Document Search'. It has a blue header with a question mark icon. Below the header is a yellow bar with the text 'Document Search'. The form contains four input fields: 'Protocol No.' with a dropdown arrow and a placeholder 'Type here to search', 'Keyword' (a text box), 'Investigator' (a dropdown menu), and 'Institution\*' (a dropdown menu showing 'University of Florida'). To the right of the Protocol No. field is a checkbox labeled 'Display All Documents'. At the bottom right are 'Submit' and 'Clear' buttons. A red box highlights the 'Submit' button. The footer of the form reads 'Copyright© 2001-2019 Forte Research Systems. All rights reserved.'

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.

## 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:

Document Search Result							
Document Search Result							
Institution: University of Florida		Protocol No: OCR19883		Keyword:			
Investigator:		Display All Documents: <b>Yes</b>					
Protocol No.	Alt. Protocol No.	Short Title	Protocol Status	Document	File Name	Version Date	Description
OCR19883	AMGEN-001; EZ-AHC-005; EZ-AHC-005	EZ-AHC-005	OPEN TO ACCRUAL	Informed Consent	<a href="#">IRB_Informed_Consent_Revised_Approved.docx</a>	08/01/2018	Revision to include genetic tests
				Informed Consent	<a href="#">IRB_Informed_Consent_Approved.doc</a>	04/30/2018	Main Consent
				OCR Billing Grid	<a href="#">Billing_Grid_OCR12345_YYYY-MM-DD.xlsx</a>	07/15/2018	Billing Grid - revised
				OCR Billing Grid	<a href="#">Billing_Grid_OCR12345_YYYY-MM-DD.xlsx</a>	06/10/2018	
				OCR COS	<a href="#">COS_OCR12345_Radiology.docx</a>	06/10/2018	COS Radiology
				OCR COS IDS	<a href="#">COS_OCR12345_IDS.docx</a>	06/10/2018	
				OCR Coverage Analysis	<a href="#">MCA_OCR12345_YYY-MM-DD.pdf</a>	06/10/2018	MCAW completed by PI
				OCR Device Table	<a href="#">Device_Table_OCR12345.docx</a>	06/10/2018	
				OCR Drug Table	<a href="#">Drug_Table_OCR12345.doc</a>	06/10/2018	

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:

Document Search Result							
Document Search Result							
Institution: University of Florida		Protocol No: OCR19883		Keyword:			
Investigator:		Display All Documents:					
Protocol No.	Alt. Protocol No.	Short Title	Protocol Status	Document	File Name	Version Date	Description
OCR19883	AMGEN-001; EZ-AHC-005; EZ-AHC-005	EZ-AHC-005	OPEN TO ACCRUAL	Informed Consent	<a href="#">IRB_Informed_Consent_Revised_Approved.docx</a>	08/01/2018	Revision to include genetic tests
				OCR Billing Grid	<a href="#">Billing_Grid_OCR12345_YYYY-MM-DD.xlsx</a>	07/15/2018	Billing Grid - revised
				OCR COS	<a href="#">COS_OCR12345_Radiology.docx</a>	06/10/2018	COS Radiology
				OCR COS IDS	<a href="#">COS_OCR12345_IDS.docx</a>	06/10/2018	
				OCR Coverage Analysis	<a href="#">MCA_OCR12345_YYY-MM-DD.pdf</a>	06/10/2018	MCAW completed by PI
				OCR Device Table	<a href="#">Device_Table_OCR12345.docx</a>	06/10/2018	
				OCR Drug Table	<a href="#">Drug_Table_OCR12345.doc</a>	06/10/2018	

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

- Documents attached to IRB reviews that have the **Released** checkbox selected - See [Document an IRB Review](#) 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.