



## **IRB Staff Post-Review Checklist**

This document is intended to assist the IRB staff in ensuring that all the necessary activities are executed in post-review of a submission.

- Edit Pre-Review (as needed)
  - Ensure that all critical information is accurately captured, including:
    - Regulatory Oversight
    - Special populations, determinations and waivers
    - Additional Harvard Determinations
    - Missing Materials (for modifications required/deferrals)
    - Uploaded supporting documents, including reviewer checklists and appropriate worksheets
  
- Track Ancillary Approvals in the main study workspace (as needed)
  - Ensure that all appropriate ancillary reviews are documented or updated
  - If the ancillary approvals list does not appear in this activity it can be corrected by the site admin. Please contact [ESTRhelp@harvard.edu](mailto:ESTRhelp@harvard.edu)
  
- Verify the Non-Committee or Committee review activities are completed accurately (always)
  
- Update Expiration Date on the main study workspace (as needed)
  - Ensure the appropriate expiration date is appearing for the submission
  
- From the workspace of the submission under review: **Finalize** appropriate documents (always)
  - All documents may be finalized every time, or only the documents associated with the submission.
  - Finalize will watermark some documents but will also convert all attachments to pdf. The process will take longer if there are many attachments. To reduce the time to process, select less documents and repeat as needed for remaining documents to be finalized.
  
- From the workspace of the submission under review: **Prepare Letter** (always)
  - Ensure documents listed are correct, and remove/update the letter as necessary
  - Generating a letter and clicking 'cancel' on the activity will save the draft on the activity and not the history. When Prepare Letter is initiated again, the most recent generated or uploaded letter is available to update or confirm (by clicking 'ok').
  
- From the workspace of the submission under review: **Send Letter** (always)
  - Ensure the correct version of the letter appears in the submission workspace (upper right corner)
  
- Edit Consent Forms on the main study workspace (as needed)
  - See Update Consent Quick Bite for details on completing this activity.