



Create, Complete and Submit an Annual Progress Report in InfoEd

1. Locate the record in InfoEd

Chief Investigator on the project: Login to [InfoEd](#). Go to 'My Items' tab and find the record requiring an Annual Progress report.

Co-Investigator/Student on the project: Login to [InfoEd](#). Enter the record number into the 'Quick Find' field on the right hand side of the screen and click 'Enter'.

2. Go into the record

Hover the cursor over the record number, then over '**Edit**' and click on '**Master Record**':

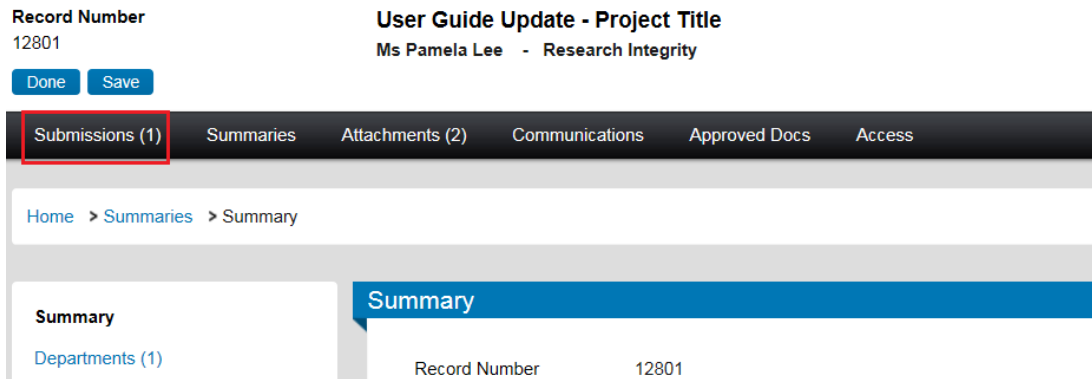
A screenshot of the InfoEd 'My Item(s)' page. The page has a dark navigation bar with 'Curtin University' and tabs for 'Home', 'My Items', 'Search For Items', 'Messages', 'Things to Do', and 'Help'. On the left, there are three menu items: 'Human Ethics', 'Animal Ethics', and 'SPIN (Funding Opportunities)'. The main content area is titled 'My Item(s)' and lists several records. The record with ID '12801' is highlighted, and its 'Edit' button is clicked, opening a dropdown menu. The 'Master Record' option in this menu is highlighted with a red box. Other records listed include 'HRE2017-0100' and '12805'.

Record ID	Item Name	Project Name	Status
HRE2017-0100	Human Protocol	Lee, Pamela - Research Integrity	Draft
12805	Human Protocol	Lee, Pamela - Research Integrity	Draft
12801	User C	Lee, Pamela - Research Integrity	Draft
12800	User C	Lee, Pamela - Research Integrity	Draft

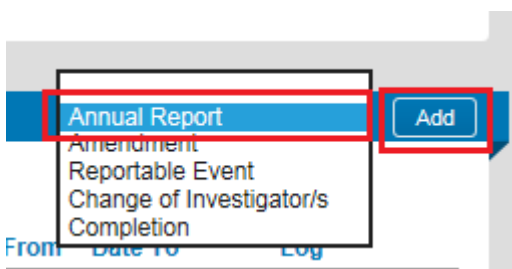
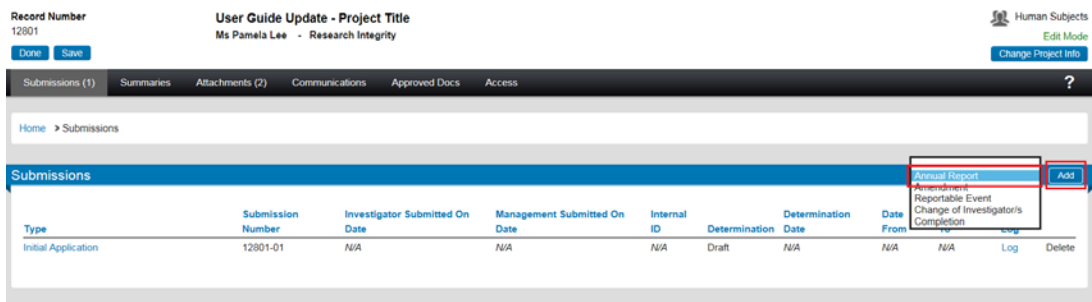


3. Create a new submission

In the 'Summary' window, click on *Submissions*'.



In the 'Submissions' window, choose the 'Annual Progress Report' submission type from the drop down box and click 'Add' to create a new annual progress report submission:

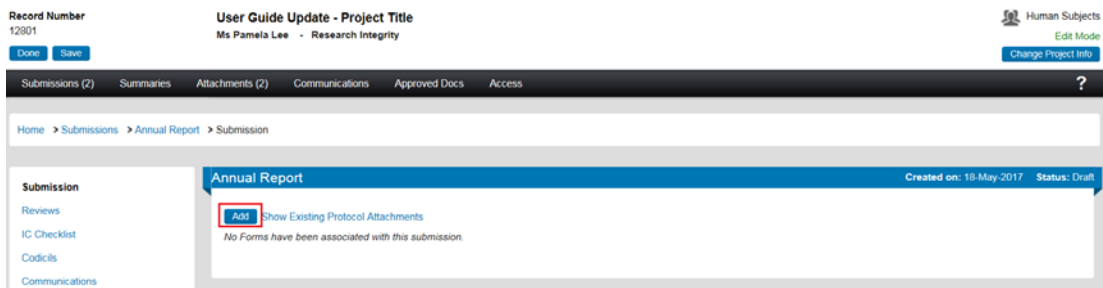


After you click on the 'Add' button, the system will now take you to the newly—created Annual Progress Report submission window.

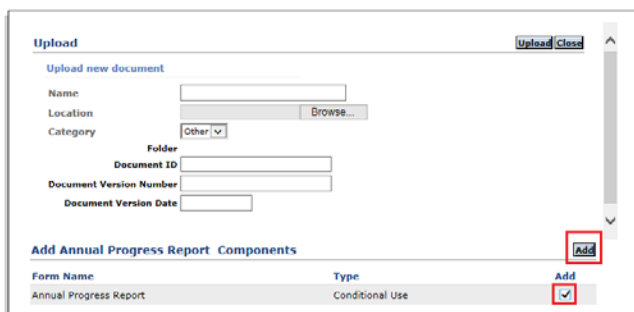


4. Add a blank form to the submission

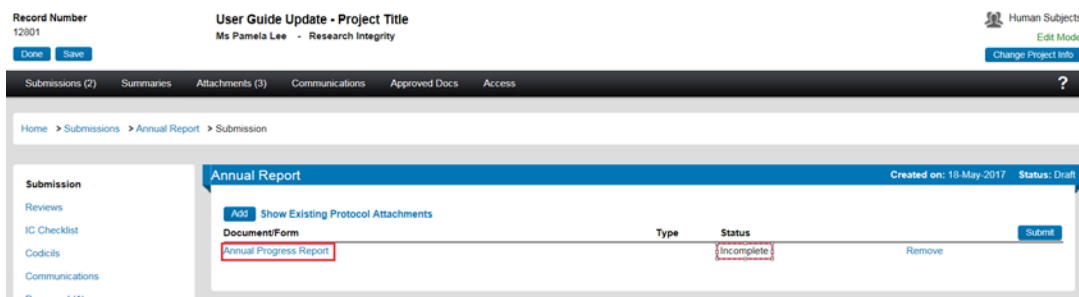
Click on the 'Add' button to open the upload window:



In the upload window, tick the box against the 'Annual Progress Report' form name and click 'Add' above the tick box:



The upload window will disappear and you will be taken back to the Annual Report submission window. A blank annual progress report form will now be added to the Annual Progress Report submission window. The status of this blank form will display as 'Incomplete' until you answer all the questions in the form.





5. Complete the form

Click on the 'Annual Progress Report' link to open the form. Fill out the form. **Please ensure you provide sufficient information about the progress of project to date.** Click 'Save' to save your answers. Once you have answered all the questions, click 'Complete' and close the form:

 A screenshot of the 'Annual Progress Report' form. At the top right, there are buttons for 'Close', 'Print', 'Form History', 'Save', and 'Complete'. The 'Save' and 'Complete' buttons are highlighted with red boxes. Below the buttons, it says 'Updated By: Pamela Lee @ 18-May-2017 05:05:53 PM'. The main content area is titled 'ANNUAL PROGRESS DETAILS' and contains the text: 'Annual report forms are required to be completed if you wish to extend your ethics approval for an additional 12 months. If you have finished your project submit a Completion Report Form.' Below this, under 'Progress Details', is a question: '* Is the project proceeding exactly as specified in the protocol?' with radio button options for 'Yes' and 'No'.

The form status will now change to 'Completed':

 A screenshot of the 'Annual Report' interface. At the top right, it says 'Created on: 18-May-2017' and 'Status: Draft'. Below this is a table with columns 'Document/Form', 'Type', 'Status', and 'Remove'. The first row shows 'Annual Progress Report' with a status of 'Completed' (highlighted with a red box). There is an 'Add' button and a 'Show Existing Protocol Attachments' link above the table.

6. Attach additional documents (optional)

Click on the 'Add' button to open the upload window:

 A screenshot of the 'Annual Report' interface, similar to the previous one, but the 'Add' button is highlighted with a red box. The table below shows the 'Annual Progress Report' with a status of 'Completed'.

Click 'Browse' to locate the document you would like to upload from your computer drive. You can only upload one document at a time.

 A screenshot of the 'Upload' window. It has a title bar with 'Upload' and 'Close' buttons. The main area is titled 'Upload new document' and contains several input fields: 'Name', 'Location' (with a 'Browse...' button highlighted in red), 'Category' (with a dropdown menu), 'Folder' (with a 'Document ID' field), 'Document Version Number', and 'Document Version Date'. At the bottom, there is a section for 'Add Annual Progress Report Components' with an 'Add' button and a table with columns 'Form Name', 'Type', and 'Add'.



Click 'Upload'. To complete the upload of the documents, close the upload window.

 A screenshot of the 'Upload' window. At the top right, there are 'Upload' and 'Close' buttons. Below is a form for 'Upload new document' with fields for Name (2017 AEC dates.docx), Location (C:\Users\2594001\Desktop), Category (Other), and several other fields. At the bottom, there is an 'Add Annual Progress Report Components' section with an 'Add' button.

The document/s you uploaded will appear in the submission window:

 A screenshot of the submission window. At the top, it says 'Annual Report' and 'Created on: 18-May-2017 Status: Draft'. Below is a table with columns 'Document/Form', 'Type', and 'Status'. There are also 'PDF', 'Replace', and 'Remove' buttons for each row. A 'Submit' button is at the top right.

Document/Form	Type	Status	PDF	Remove
Annual Progress Report		Completed	PDF	Remove
Payments-in-research-V1-06OCT20151.pdf	Other	Completed	Replace	Remove

7. Submit the report

Click the 'Submit' button:

A screenshot of the main submission page. It shows a navigation menu at the top with 'Submissions (2)', 'Summaries', 'Attachments (4)', 'Communications', 'Approved Docs', and 'Access'. The main content area shows the 'Annual Report' submission window, which is the same as the one in the previous screenshot, but with the 'Submit' button highlighted with a red box.

If you are the Chief Investigator, a separate window displaying the researcher declaration will appear, asking whether you accept or decline the declaration. Click 'Accepted > Continue'.

If you are the Co-Investigator/Student, the status of the submission will change from 'Draft' to 'Submitted'. The annual report submission will have to be signed off by the Chief Investigator and all other listed investigators before it is assigned to the Research Ethics Office for processing.



Support Available

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