

Creating SSAs for sites – by SSA owner


OFFICIAL

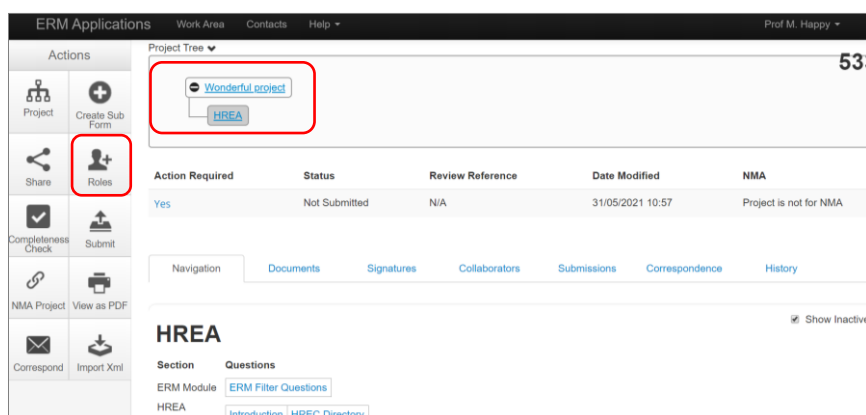
Study Set Up: Creating SSAs for sites by the SSA owner

The HREA owner uses **Roles +** action to assign the collaborator permission to view HREA and create sub forms.

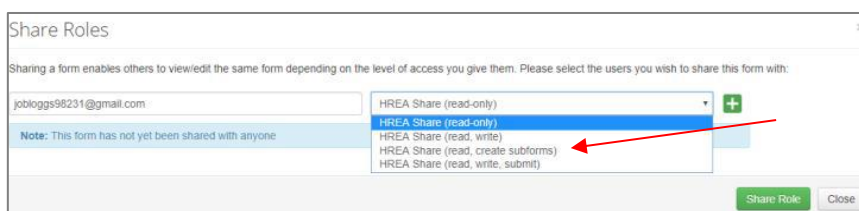
The collaborator creates the SSA as a sub form and is the SSA owner.

Steps – for HREA owner

1. Create  the HREA
2. Select **Roles +** button from the Action pane. This raises a Share Roles pop up text box



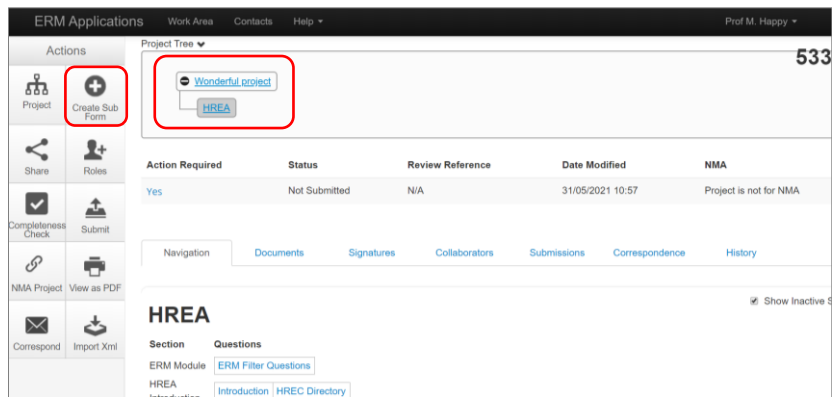
3. Enter the Collaborator's ERM email address and select access level e.g. HREA Share (read, create subforms). Select **Share Role**



Steps – for Collaborator (SSA owner)

4. The Collaborator will receive an email notification about their assigned role in the project and logs in to their ERM account.
5. The HREA is displayed in the Project Tree and all HREA supporting documents can be accessed. Select the **Create Subform** button under the Actions pane

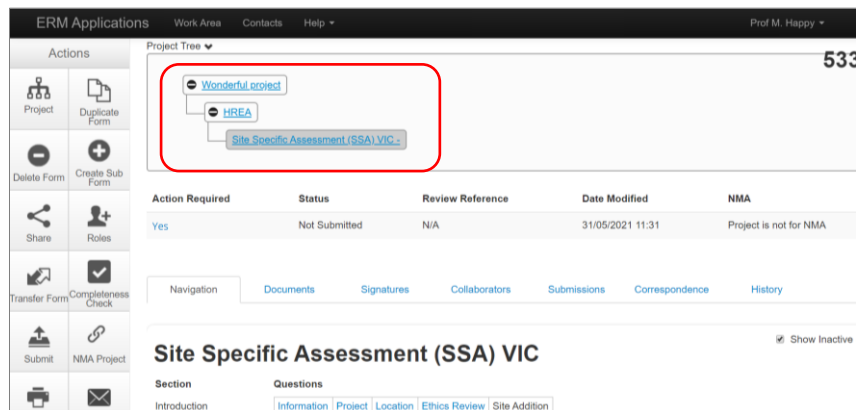
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6. A Create Sub-form text box will be displayed. Select the Site Specific Assessment (SSA) VIC and select **Create**

The 'Create Sub-form' dialog box is shown. It has a title bar 'Create Sub-form' and a close button. Inside, there is a 'Select Jurisdiction' dropdown menu with 'Victoria' selected. Below it, there is a text prompt: 'Select the sub-form that you would like to apply to this form'. Underneath, there is a dropdown menu with 'Site Specific Assessment (SSA) VIC' selected. At the bottom right, there are two buttons: 'Create' (green) and 'Close' (grey).

7. The SSA will be displayed in the Project Tree



8. Complete the SSA and submit to the site Research Governance Officer (RGO).
See **Applicant user guide to ERM** Section 9: Site Specific Assessment (SSA) for more details.

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