

How to upload documents to the HREA and SSA in ERM


Upload documents to the HREA

Supporting documents to be attached to the application are uploaded in **Section 4** of the HREA.

Steps

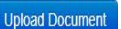
1. Navigate to **Attachments Q 4.1** of the HREA by selecting the **Upload** hyperlink to attach the protocol to the HREA

The screenshot shows the ERM Applications interface. The 'Actions' menu on the left includes 'Project', 'Create Sub Form', 'Share', 'Roles', 'Completeness Check', 'Submit', 'NMA Project', 'View as PDF', 'Correspond', and 'Import Xml'. The main content area displays various tabs and options, with the 'Upload' button highlighted in red.

2. Select **Upload Document**  to attach the protocol from your local drive. The version date and version fields are compulsory. Select the **Upload** button.

The screenshot shows the 'Documents - Protocol' form. It includes fields for 'Document Name', 'Version Date', and 'Version'. The 'Upload' button is highlighted in red.

3. Other supporting documents e.g. Participant Information Consent Form (PICF) can be uploaded in **Q 4.2**. Select the relevant document type from the available list.

Press **Upload document**  to attach the selected supporting document from your local drive

4. Documents can be viewed and downloaded from the **Documents** tab


The screenshot shows the 'Documents' tab in ERM. It displays a list of documents with columns for 'Type', 'Document Name', 'File Name', 'Version Date', 'Version', and 'Size'. The 'View Selected' and 'Download Selected' buttons are highlighted in red.

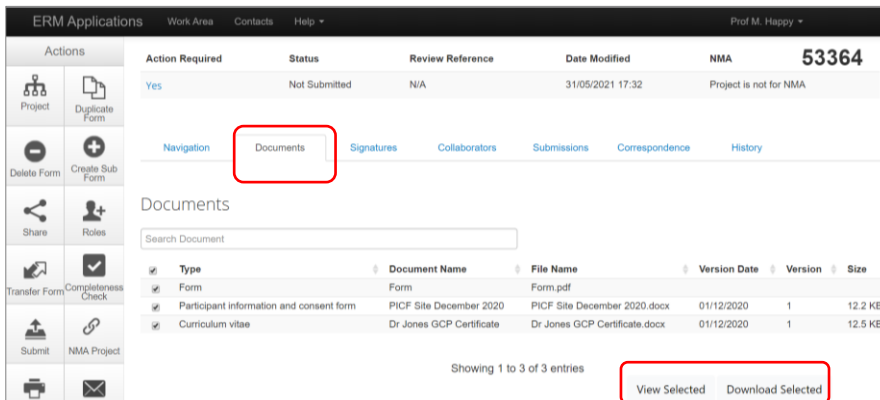
Upload documents to the SSA

Steps

1. Site specific supporting documents are uploaded as relevant sections of the SSA are completed

Section	Questions (hyperlink)	Document example
Site Research Team	Documents	<ul style="list-style-type: none">• Curriculum Vitae• GCP training certificates
Participant	Recruitment	Q 4.1 <ul style="list-style-type: none">• Site specific PICF
Regulation	Research Agreement	Q 5.2 <ul style="list-style-type: none">• Clinical Trial Agreement (CTRA)
Other Documents	Other Documents	Q 7.1 <ul style="list-style-type: none">• Scanned hard copy signature document• Departmental forms

2. Press **Upload document**  to attach the supporting document from your local drive
Uploaded documents are displayed under their type, name, file name and version
3. Documents can be viewed and downloaded from the **Documents** tab



The screenshot shows the ERM Applications interface. The top navigation bar includes 'ERM Applications', 'Work Area', 'Contacts', and 'Help'. The user profile 'Prof M. Happy' is visible. The main content area is titled 'Documents' and contains a search bar and a table of documents. The table has columns for 'Type', 'Document Name', 'File Name', 'Version Date', 'Version', and 'Size'. Two documents are listed: 'Participant information and consent form' and 'Curriculum vitae'. At the bottom right, there are buttons for 'View Selected' and 'Download Selected'.

See **Applicant user guide to ERM** for more details.

Authorised by the Coordinating Office for Clinical Trial Research

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