


# Creating SSAs for sites – by HREA owner

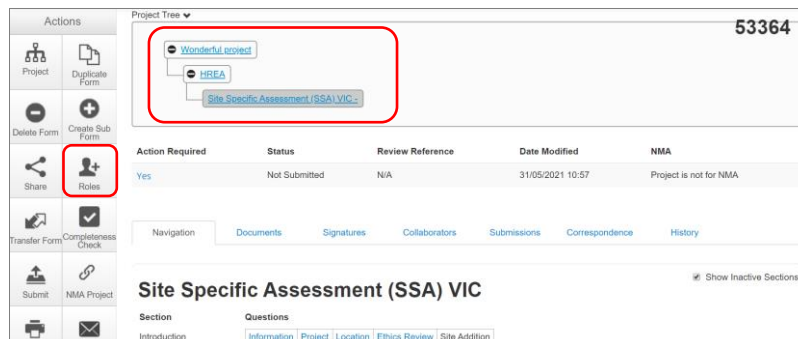
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## Study Set Up: Creating SSAs for sites by the HREA owner

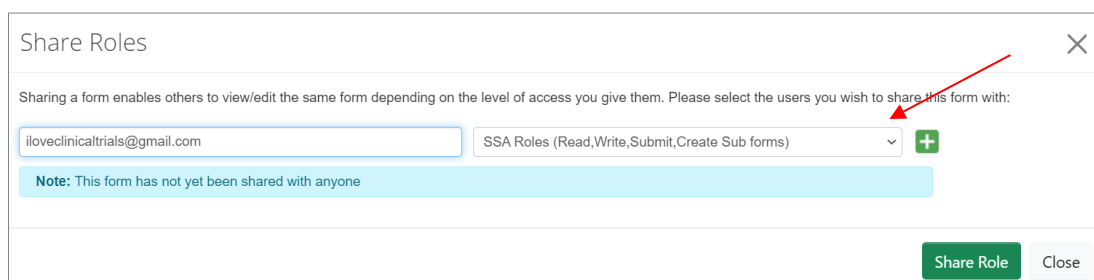
The HREA owner creates the SSA as a sub form of the HREA. The HREA owner uses **Roles +** action to give collaborator permission to view/ manage the SSA.

### Steps – for HREA owner

1. Highlight the HREA and select the **Create Subform**  button under the Actions pane. Select Site Specific Assessment form from the dropdown list. The SSA is created as a sub-form of the HREA.
2. The SSA may be started then responsibility for its completion and submission can be assigned to the collaborator. Select **Roles +** from the Action pane.



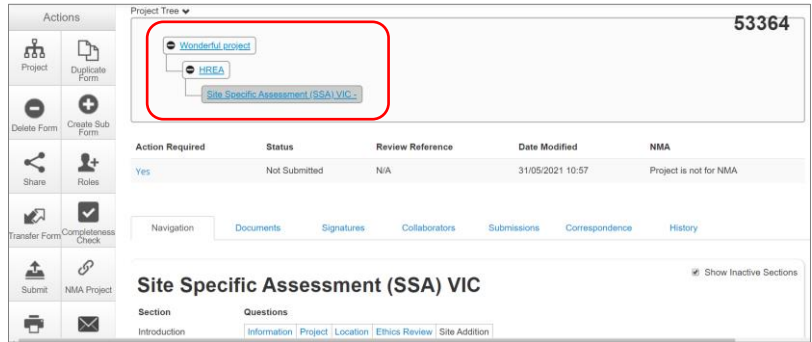
3. A Share Roles pop up text box is displayed. Enter the collaborator's ERM email address and select **SSA Roles**  
Click the **Share Role** button.



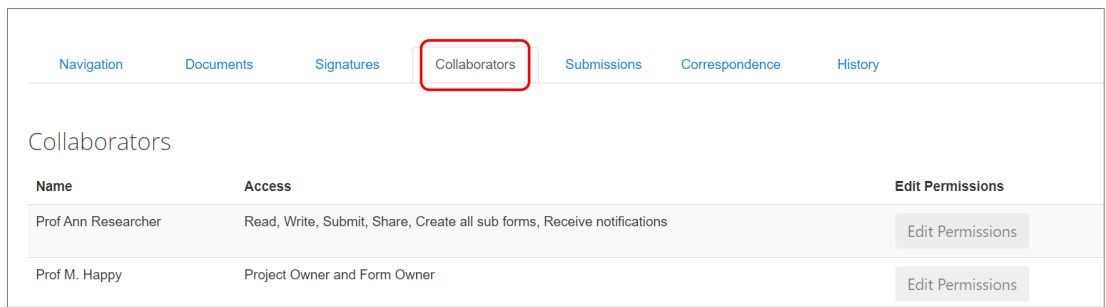
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## Steps – for Collaborator

- 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 and SSA are displayed in the Project Tree and all HREA supporting documents can be accessed. Select the SSA in the project tree.



- 6. Under the SSA Collaborators tab, the full suite of permissions is displayed – Read, Write, Share, Create all sub forms, Receive notifications



- 7. The collaborator can complete and submit their site SSA to the site Research Governance Officer (RGO). The HREA owner remains the SSA owner.

See **Applicant user guide to ERM** Section 9: Site Specific Assessment (SSA) for more details.

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Authorised and published by the Victorian Government, 1 Treasury Place, Melbourne.  
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