


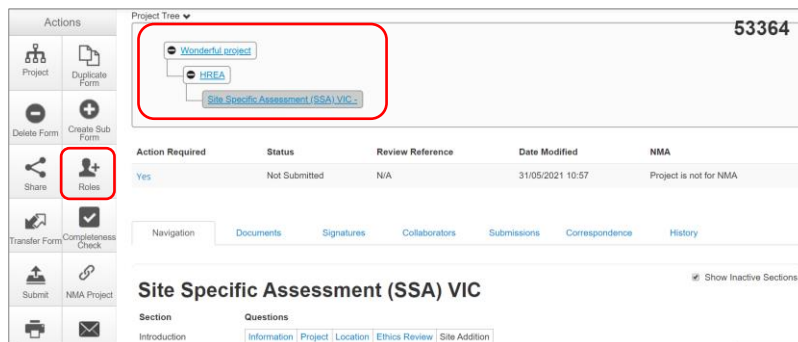
Creating SSAs for sites - by HREA owner

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

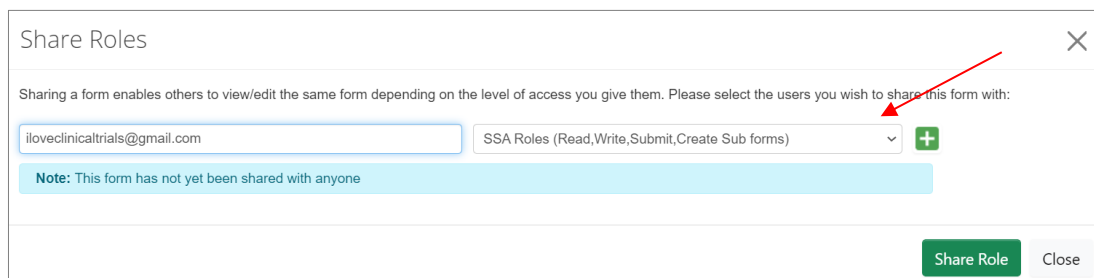
The HREA owner creates the SSA as a sub form of the HREA. The HREA owner uses **Roles +** action to give collaborator permission to view/ manage the SSA.

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.

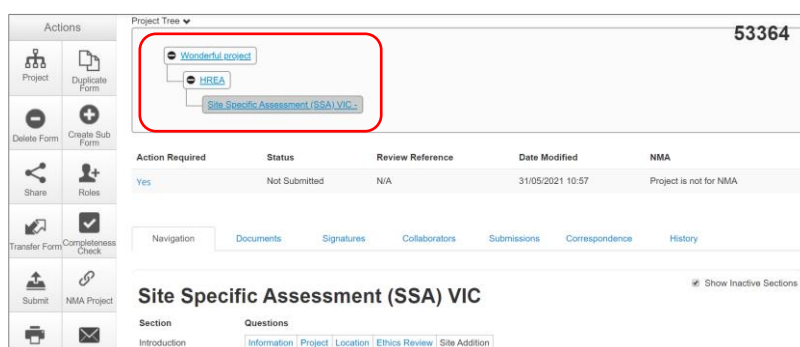


3. A Share Roles pop up text box is displayed. Enter the collaborator's ERM email address and select **SSA Roles**. Click the **Share Role** button.

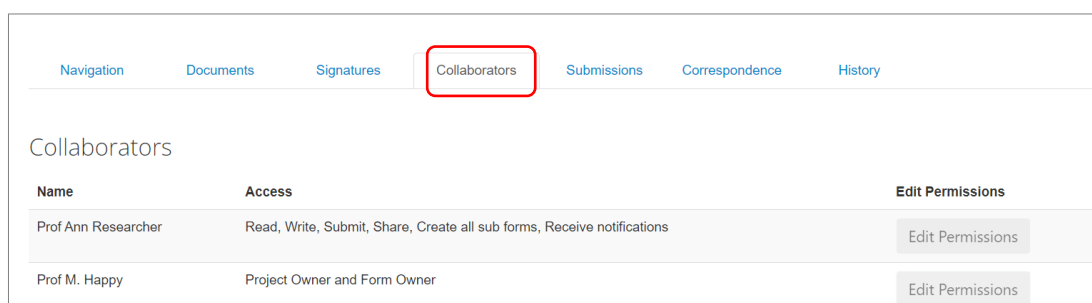


Steps – for Collaborator

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.



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



- 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.

Authorised by the Coordinating Office for Clinical Trial Research

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