

ELECTRONIC PROGRAM UTILIZATION PORTAL (ePUP)

MANUAL FOR USERS

Electronic Program Utilization Portal



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Version Date: April 28, 2022

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WHAT IS EPUP?

ePUP stands for electronic Program Utilization Portal. It is a one-stop, single, electronic application to manage the submission, review and approval of program resource utilization requests for new and ongoing research studies across BC Children’s Hospital.

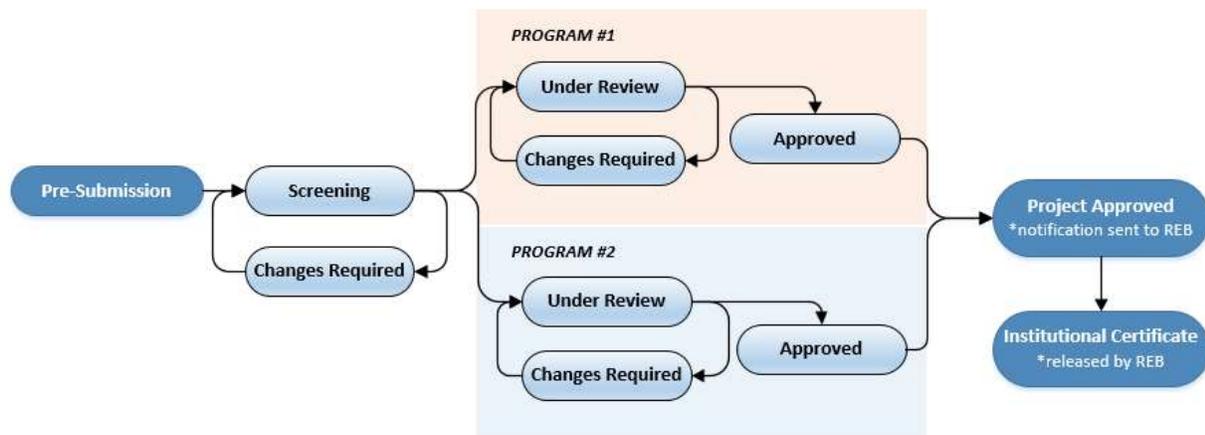
Every research study that is conducted at BC Children’s requires BOTH Research Ethics Approval as well as Institutional Approval before any research activities can commence. Currently, Researchers can obtain an Institutional Certificate of Approval after receiving a signed Program utilization form from each of the individual program areas impacted by the study. Program utilization approval ensures that proposed research activities are feasible in the relevant program areas and where relevant, are integrated into clinical care workflows.

With the launch of ePUP in designated programs, Researchers can now receive program utilization approval electronically and no longer need to obtain a wet-ink signature on a paper document.

The goals of ePUP are to:

- Streamline the submission, review and approval process of new studies initiated in various program areas across BC Children’s Hospital.
- Improve communication and transparency between research teams and operational leaders with respect to the initiation of new research activities.
- Maintain a database of existing and past studies in each Program area across BC Children’s Hospital.

ePUP Workflow



ACCESSING ePUP

ePUP is built and located behind the BC Children’s Hospital Research Institute firewall. As such, additional steps will be required if you plan to access ePUP remotely.

Accessing ePUP on the C&W Oak Street Campus:

- Go to: <https://epup.bcchr.ca>
- Enter your BCCHR or PHSA email address and network password to log in. Note that the password is the same as your usual network login, the same one you login to access your work BCCHR/PHSA computer.

Note: The email you use to log into ePUP is the email that will receive all ePUP system notifications. Please make sure you log in with your primary email to ensure you will receive all ePUP notifications regarding your project approval.

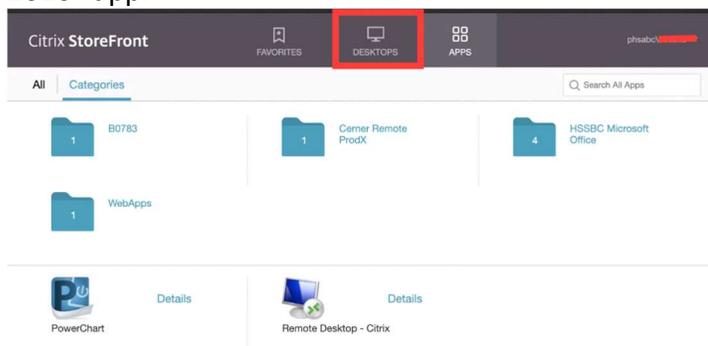
Accessing ePUP Offsite:

For BCCHR Users

- Connect to BCCHR VPN from your home computer. Instructions on setting up VPN can be found [here](#).
- Once connected to VPN, go to: <https://epup.bcchr.ca>
- Enter your BCCHR, PHSA, or UBC email address and password to log in. Note that the password is the same as your usual network login.

For PHSA Users

- Connect via Citrix from your home computer. Instructions on setting up Citrix remote access can be found here: <http://imitsinfocentre.healthbc.org/resources-site/remoteaccess-site/Pages/citrix.aspx>
- Once connected to the Citrix portal, select “Desktop” Tab, and click “Microsoft Desktop 2016” app.



*If you experience any difficulty accessing “Microsoft Desktop 2016” app, please submit a ticket via [PHSA IMIT](#).

- Once Microsoft Desktop 2016 is selected, a virtual desktop will appear. Go to the browser of your preference (preferably Google Chrome), and go to: <https://epup.bcchr.ca>
- Enter your BCCHR, PHSA, or UBC email address and password to log in. Note that the password is the same as your usual network login.

Note: The email you use to login to ePUP is the email that will receive all ePUP system notifications. Please make sure you log in with your primary email to ensure you will receive all ePUP notifications regarding your project approval.

If you have any issues with logging into ePUP, please contact the ePUP administrative team at: crsadmin@bcchr.ca.

DEFINITIONS

Some terms and definitions you should be aware of when using ePUP:

PROJECT – refers to a single research project with a given protocol. We recommend a single submission for each project (similar to the process of REB applications – i.e. for every REB submission you will need a single ePUP submission).

PROGRAM – refers to a hospital-based clinic, clinical department or division, or specific area where clinical research activities occur.

PROJECT SUBMITTER – refers to either the PI and/or a delegated study team member who has submitted a new request for review and approval in ePUP. In addition to the individual who submits the ePUP application, all notifications regarding the status of the project will also be sent to the listed PI and Primary Contact noted on the application form.

PROGRAM APPROVER – refers to the individual within a specific Program who has been delegated approver rights within ePUP. In some Program areas where an oversight committee may be responsible for reviewing and approving all study requests, there is typically one designated individual who will approve the ePUP application on behalf of the entire committee. Program areas may designate up to two individuals as Program Approvers, for example a Program Manager and a Division Head.

NAVIGATING IN ePUP

After successfully logging in, you will arrive on the **Home** page (shown below).

Electronic Program Utilization Portal

Home Submit a Project My Projects FAQ

monica.ho1@cw.bc.ca

Sign Out

Announcements

Welcome to ePUP (the electronic Program Utilization Portal). Your future one-stop electronic Program and resource utilization approval system for all research studies occurring at the BC Children's & Women's Hospitals. This application is currently undergoing beta testing and is being used in the Emergency Department and Medical Day Unit to test initial usability.

Portal Workflow

Program 1

Under Review

Changes Required

Leadership Review

Program 2

Under Review

Changes Required

Leadership Review

Pre-Submission

Screening

Changes Required

Final Approval

Certificate Release

General information & system announcements will be shown here.

Log off by clicking "Sign Out". Note that the system automatically logs off after 30 minutes of inactivity.

Portal workflow depicts the general approval flow of a project. Note that the Institutional Certificate is released only after Final Approval is granted. Final Approval is generally granted after **ALL** program areas grant approval but can also be granted without approval from specific program areas when appropriate.

The blue navigation bar at the top of the page can be used to navigate to different sections of the ePUP application. Where you can:

- **Submit a Project**
- Review **My Projects** – This tab shows your draft projects, previously submitted projects and approved projects.

Electronic Program Utilization Portal

Home Submit a Project My Projects FAQ

monica.ho1@cw.bc.ca

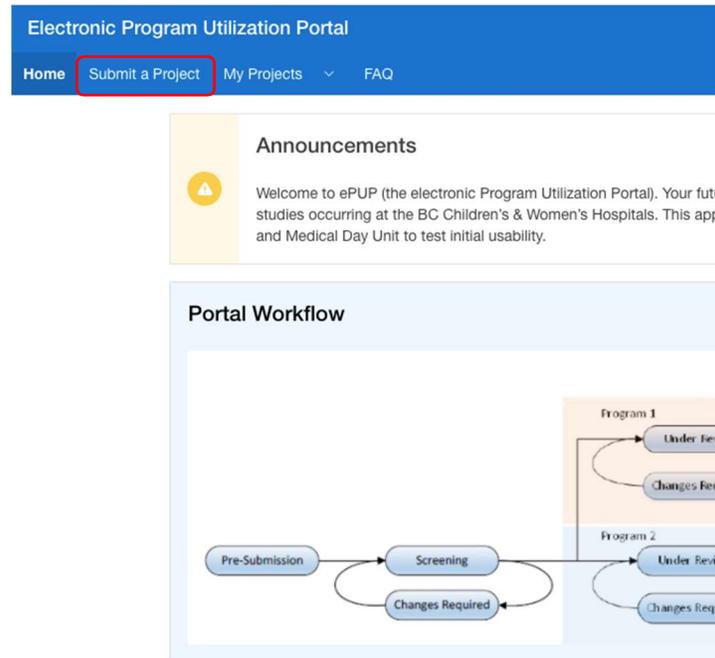
Draft Projects/PAA

Submitted Projects/PAA

Approved Projects/PAA

SUBMITTING A NEW PROJECT

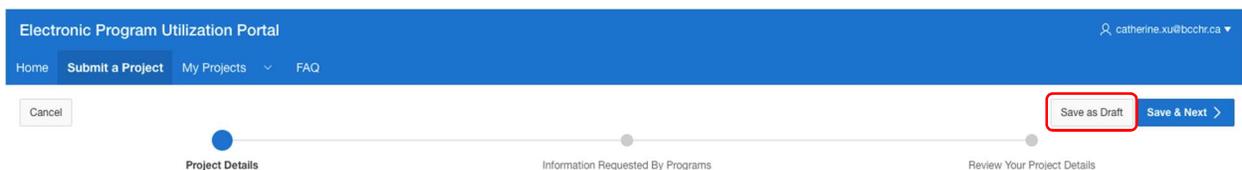
From the blue navigation bar at the top of the page, select “Submit a Project” to create a new application for a new research project.



The new application process requires you to complete 3 steps:

1. Enter general **Project Details**
2. Enter specific **Information Requested By Programs** – based on the number of different hospital programs in which your research project will impact, you may need to complete several forms here for each specific program area.
3. **Review Your Project Details** and submit to all Programs for review.

At any point you can save your application as a draft and return at a later date to complete the submission process. On the top right-hand corner, select “Save as Draft”.



When you return to ePUP at a future time, navigate to the My Projects tab and select “Draft Projects/PAA” from the dropdown menu. Select the blue “document” icon to begin editing your Draft.

<input type="text"/> <input type="button" value="Go"/> <input type="button" value="Actions"/>			
	Project Title	Project Identifier	
	MH TEST 04.27.2021A	H99-99999-001	

Enter the Applicant Information

The dropdown lists for “Principal Investigator” and “Primary Contact” on the general project details form are based on membership in the [BCCHR Research Community Member Directory](#). The Principal Investigator (PI) and/or Primary Contact noted in ePUP must therefore be added to the Directory before they can be selected within ePUP. The Research Community Member Directory (RCM) includes investigators, trainees, staff and health care professionals from across BC Children’s who are interested in research and would like to engage with the BC Children’s research community. Any individual within our community can register to request a profile be created on the RCM. Visit the RCM link noted above and select “Request a Profile”.

Any external PI’s or study teams who are planning to conduct research activities at BC Children’s Hospital MUST have a local PI designated for the study. Only a local PI can be listed on the C&W REB and Hospital Institutional (ePUP) approval certificates.

the project submitter is not the Principal Investigator (PI), please be sure to list yourself as the primary contact to ensure you receive all notifications regarding updates to the project's status. You are welcome to copy your research proposal, recruitment plan and study procedure/schedule summary from your ethics application. For further assistance, contact details for questions, please refer to the FAQ section on the "How" page.

Project Details
 Information Requested By Programs
 Review Your Project Details

Applicant Information

Principal Investigator

Please fill in the Principal Investigator's name. The system will automatically retrieve the PI's email from the RCM.

* Principal Investigator

* Principal Investigator Email

Primary Contact

Enter the Primary Contact who will also receive notification in addition to the PI on this project's application

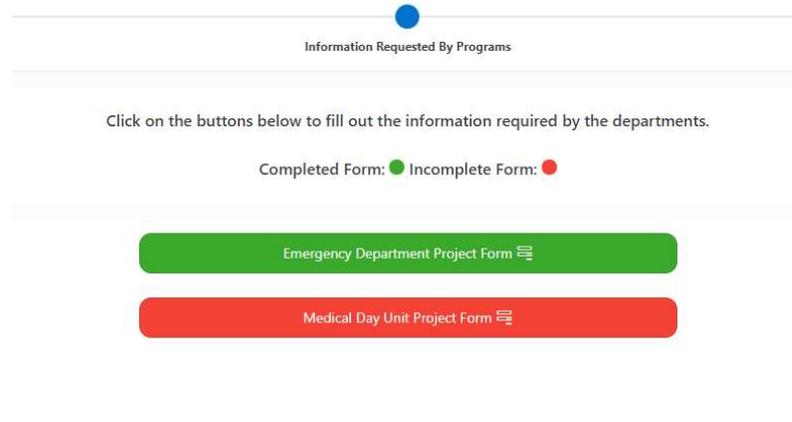
* Primary Contact Name

* Primary Contact Email

Primary Contact Role

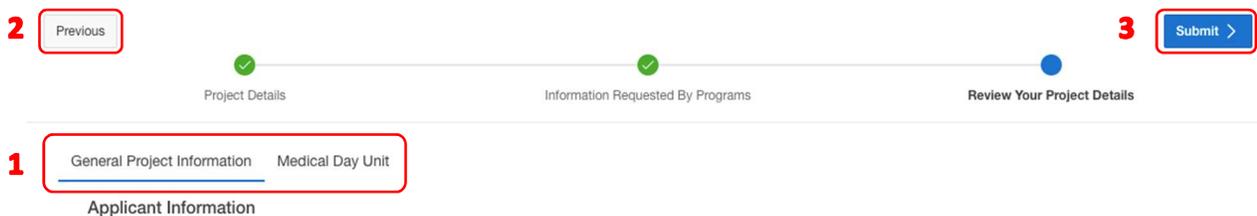
After you have entered the general project details (which will be viewable by all Hospital Programs), click “Save & Next” to proceed to step #2: Information Requested by Programs.

Based on selections made on the general project details page, a red box will appear for each Program area that is requesting additional information as part of your ePUP submission. Click on each of the red boxes to complete these additional forms. Once the Program specific forms are complete, they will appear in green.



Again, at any point you can save your application as a draft by selecting “Save Draft” and you will be able to return to complete your submission at a later date. When you have completed each Program specific form, select “Save & Proceed”. You must complete all Program specific forms (they must all appear green) before you can proceed to the final step.

The final step is to review all information entered before submission. In this step, you will see tabs across the top of the page which will show each of the forms that you have completed, including “General Project Information” as well as any Program specific forms (1). If edits need to be made, navigate backwards to change or update the forms by selecting “Previous” (2). When you have finished your submission, select the blue “Submit” button (3). A green message will appear at the top of your page stating that the Project has now been submitted for review.



Note: While the Project is under review, your application becomes locked and you will no longer be able to edit the application. If you realize there is a mistake and you need to amend your submission, please email: crsadmin@bcchr.ca for assistance. To help in identifying your record, please include the PI Name, Project Title and if available, the assigned REB H# in your email.

CHECKING ON THE STATUS OF YOUR PROJECT

To review the status of a previously submitted project, go to the “My Projects” tab and select “Submitted Projects/PAA” from the dropdown menu. A table will show all previously submitted projects that have not yet been approved. The final column of the table will show the Project Status.

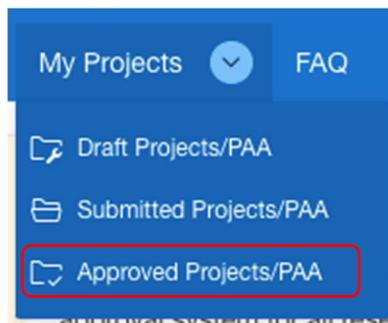
You will find that your application has one of the following Status listed:

- **Screening** – The application is currently undergoing institutional screening – this step reviews submissions for completion and ensures that you have selected all the relevant Program areas that may be impacted by this work.
- **Program/Under Review** – The application is currently undergoing review by each Program area that has been identified in your application. Program area review happens concurrently, which means that you may receive approval from one Program area, while another Program area is still completing their review. As long as one Program area is still undergoing their review, your Project status will remain as “Program Review”.

Note: If multiple Program areas are selected on your application, you can also check the approval status for each of the selected Program areas (see [“Checking on the Status of an Individual Program Area”](#) below).

- **Changes Required** – Indicates that at least one Program area has requested further clarification or changes to the ePUP submission. The Project Submitter, Principal Investigator, and Primary Contact will all be notified when the status changes to “Changes Required”.

When **all** Program areas have been approved, the Project Submitter, Principal Investigator, Primary Contact, **and the C&W REB** will all be notified. Projects that receive approval can now be found under “Approved Projects/PAA” from the “My Projects” tab.



For more information on ePUP approvals see [“Approval”](#) below.

Checking on the Status of an Individual Program Area

If multiple Program areas are selected on your application, you can also check the approval status for each of the selected Program areas individually. Go to the “My Projects” tab and select “Submitted Projects/PAA” from the dropdown menu. Select the document icon for the Project that you wish to check on. You will also be able to view your submitted application, but cannot make any changes at this time.

Submitted Projects					
Q ▾					
Go		Actions ▾			
	Project Title	Project Identifier	Principal Investigator	Created On	Status
	User Guide Demo	REB Number is Missing	Catherine Xu	2022-03-03	Screening

From the Project Details page, click “Next” to navigate to the “Information for Programs” page. Select the Program area that you wish to review (e.g. Sunny Hill). The status of the review will be noted at the top of the Program area form as either “Under review”, “Changes required”, “Approved”, or “Denied”. Note: If your application is still under screening, there will be no status here.

Sunny Hill

Program Status

Status **Under review**

RESPONDING TO CHANGES REQUIRED

The Project Submitter, Principal Investigator, and Primary Contact will all be notified via email when a Project status changes to “Changes Required”. This notification simply informs the Study Team that their action is required next. Responses can NOT be completed via this email. **You must login to ePUP in order to review and respond to changes required** and continue with the review and approval process for your Project.

Login to ePUP and navigate to the “**My Projects**” tab and select “**Submitted Projects/PAA**”. Click on the documents icon of the Project that has requested changes required.



Your Project will now be unlocked and you are able to make changes to fields in the main “Project Details” form, **except for Program area selection** (i.e. Where will the study activities take place?). You will also be able to edit the Program form of the Program area who requested the Changes Required by navigating to the “Information for Programs” page. Other Program forms will be locked, unless they have also requested for changes.

Next, click on the blue **Correspondence** button located at the top left-hand corner to review the correspondence from the reviewing Program.



Correspondences are grouped by program area. Click on the box underneath the question to respond to the correspondence (1).

SUNNYHILL Answer Question

Correspondence from SUNNYHILL

Question from CATHERINE.XU@BCCHR.CA on 2022-03-07 03:13:58 :
Please provide a copy of your Study Visit Schedule under Attachments on the main Project Details form. A sample Visit Schedule template is attached as a reference.

1 Answered by on : >

Input your response in the text box (2) and format your text using the drop-down icon (3). To view any documents provided by the Program area reviewer, click download (4). Be sure to select “Save Response to Question” to save your response (5). You can still edit your response afterwards. Note that at this point, your changes and responses have not yet been submitted. **You MUST continue to the last page and select “Submit for Program Review” to you’re your changes back to the Program to complete the review.**

SUNNYHILL Answer Question ✕

Question from Department Administrator **Please provide a copy of your Study Visit Schedule under Attachments on the main Project Details form. A sample Visit Schedule template is attached as a reference.**

4 Document [Download](#)

Your Response 3

2

5 [Save Response to Question](#)

You can always confirm the status of your submission by navigating to the “**My Projects**” tab and selecting “**Submitted Projects/PAA**”. The final column will show the Project Status. See [“Checking on the Status of your Project”](#) above for an explanation of each status.

APPROVAL

The Project becomes Approved in ePUP, when **all** selected Programs have completed their review. The Project Submitter, Principal Investigator, Primary Contact, and the C&W REB will all be notified via email when a Project becomes Approved. This will include a list of all Program Areas that have “Approved” the Project.

Institutional Approval Certificates will continue to be issued by the C&W REB when ALL impacted Program areas have completed their review and approval. This means that the C&W REB will accept EITHER an electronic notification via EPUP OR a signed scanned copy of the paper [program utilization form](#) (PUF) as evidence of approval by the Program area. Research teams using ePUP will only need to complete a paper PUF for those Programs that are NOT included in EPUP.

If a Program area denies a request, the Project Submitter, Principal Investigator, and Primary Contact, will be notified, including rationale from the Program regarding why the request was rejected. The C&W REB will not be notified when a Project has been “Denied” by a Program area.

If the ePUP submission included multiple Program areas where one Program Denied the request and another Program Approved it, the final project status in ePUP will be listed as “Approved” but the C&W REB will only be notified of the Program areas that Approved the request.

If you have concerns with the outcome of your review, we suggest that you discuss your project application with the relevant Program leadership outside of ePUP (e.g. over email, Zoom, etc.). When you are ready to re-submit your study from Program review, please submit a Post-Approval Activity (PAA) to request approval from the Program as a “new” Program area. See [“Creating a Post-Approval Activity”](#) below for more information.

In exceptional circumstances, the Institutional reviewer can also initiate a Program notification to REB before all program areas have completed their review in ePUP. This would enable a partially approved project to obtain Institutional Approval in approved program areas, while unapproved areas may continue their review process. Note that **only** program(s) that have provided approval will appear on the Institutional certificate. **Research activities may ONLY begin in those areas that are listed on the Institutional approval.** To request this, contact crsadmin@bcchr.ca.

WHAT IS A POST-APPROVAL ACTIVITY (PAA)?

A Post-Approval Activity (PAA) is created after a Project has been Approved, but when the study team wants to complete one of the following activities:

- **Adding a Program Area(s)** – Use to indicate that study activities will now occur in a new Program area that wasn't selected during the initial ePUP submission and approval for this Project.
- **Removing a Program Area(s)** – Select to indicate that study activities for a Project will no longer be occurring in a Program area.
- **Change to Existing Program Area(s)** – Select to indicate that new or different kinds of study activities will now be occurring in a specific Program area that has previously approved this Project.

Note: These new or different study activities MUST relate to the existing Project. If these activities are related to a new/different Project, then a new, separate ePUP Submission should be completed (see [“Submitting a New Project”](#) above).

- **Administrative Changes** – Select to change the Primary Contact noted for the application. This can also be selected to indicate other administrative changes to the application such as a change to the REB status.
- **Extension of Project** – ePUP Approvals are granted for a period of 3 years. Before the end of the 3 years, the Research Team must declare if the research activities related to the Project will be ongoing (i.e. will require an extension) or if the Project has closed (i.e. select “Termination of Project”). *Please note that it is not necessary to keep the Project open in ePUP when there are no research activities that directly impact the Program areas (i.e. during data analysis, manuscript writing, or publication).*
- **Termination of Project** – Select to indicate that the research activities have ended in all impacted Program areas. Please note that research activities including data analysis, manuscript writing, and publication may continue even while the Project is listed as “Terminated” in ePUP. If ongoing knowledge translation activities are expected to impact selected Program areas, then the submission should remain active in ePUP and details of this should be included in the submission (i.e. If KT activities were not included in the original submission, complete a “Change to Existing Program Area” PAA to add these activities to your Project submission).

CREATING A POST-APPROVAL ACTIVITY

To create a PAA, go to “My Projects” tab and select “Approved projects/PAA” from the drop down menu. Click on the document icon (1) to access your intended project and select “Initiate PAA” in the top left-hand corner (2).

Projects Received Institutional Approval

	Project Principal Investigator	Project Identifier	Project Title	Last Status Update Date
1	Catherine Xu	123456789-001	PAA Demo	2022-03-31

Cancel
Correspondence
Next >

2
Initiate PAA

●
Project Details

●
Information for Programs

●
Review Project Details

Fill out the PAA Coversheet according to the changes you intend to make (see above for types of PAA). Click “Save” once you are finished. **Note:** you will not be able to come back to edit this coversheet once saved. Please make sure you finalize the coversheet before clicking save.

PAA Cover Sheet ×

Note you will not be able to come back to edit this coversheet once saved. Please make sure you finalize the coversheet before clicking save.

Enter a Nickname for this PAA

Are you submitting a termination? Yes No

Please select a PAA activit(ies) *

- Adding a Program Area(s)
- Administrative Changes
- Change to Existing Program Area(s)
- Extension of Project
- Removing a Program Area(s)

Summarize proposed changes to the study and impacts on existing program areas

Please explain the reason for the above proposed change(s)

Save

After saving, your project will be moved to “Draft Projects/PAA”, under the “My Projects” tab with a Project Type of “Amendment”. By clicking the document icon, you can then edit the General Project Form and any Program specific form(s). Please only make the changes that were stated on the PAA coversheet. Ensure that you submit the Project after making your changes by navigating to the last page.

Project Drafts					
Q ▾		Go		Actions ▾	
	Project Title	Principal Investigator	Project Creation Date	Project Identifier	Project Type
	PAA Demo	Catherine Xu	2022-04-04	123456789-002	Amendment

There are two types of PAA workflows:

- a) For activities: Administrative Changes, Extension of Project and Removing a Program Area(s), the PAA will be approved once it passes Institutional screening.
- b) For activities: Adding a Program Area(s) and Change to Existing Program Area(s), the PAA will undergo screening and Program specific review. This is identical to the process when you first submitted your original Project for ePUP review. To review information on how to [submit your project](#) and [respond to changes](#), follow the instructions [above](#).