

Kuali Protocols FAQs

1. What is Kuali Protocols?
 - a. An innovative new Kuali Research module that streamlines the development of protocols and facilitates efficient institutional best practices in protocol management throughout the research lifecycle. The newly redesigned module facilitates fast, clear, and specific communication between protocol offices, committees, and researchers to ensure protocol efficiency and compliance.

2. How do I create a new protocol?
 - a. Access Kuali Protocols using your regular SCSU SSO login information. To start a new protocol, simply click the 'New Protocol' button in the top right-hand corner of the Manage Protocols screen and select the appropriate Protocol Type. Once initiated, the system will guide you through the protocol creation starting with General Information.

3. How do I submit a protocol?
 - a. Upon completion of your protocol, you can submit for review using the appropriate 'Submit' action button on the right-hand corner. After you click the 'Submit' button, the protocol will be sent to the appropriate protocol administrator for review. After submission, you can track the progress of your protocol in the researcher portal, which will display the current Status, Assignment, Assigned Reviewers, Approval Date, Expiration Date, etc.

4. How do I amend or renew a protocol?
 - a. Once a protocol is approved, the PI or Admin can initiate an Amendment or Renewal on the protocol if needed. This will allow you to modify or submit a request for a renewal on the same protocol. Within these actions, you can update information and attach necessary updated documents for review.

5. What do the different protocol statuses mean?
 - a. Click [here](#) to find out what each status means. [Note: Link redirects to page supported by Kuali Protocols]

6. How do we add students to protocols?
 - a. Students must login to Kuali directly; an account for them will then be created. After account is created, the PI can create a new or edit a protocol and add the student.

7. Does the protocol save automatically while editing?
 - a. Yes, a black screen will pop-up from the bottom of the screen notifying of each successful save.

8. Can the protocol be routed to the advisor for approval before going to the committee?
 - a. Currently, no. That workflow won't be available for several months. For now, students can add their advisor to the protocol with full-access permissions to review, edit, add documents, etc.

9. Is it better to have students and faculty complete drafts outside of the Kualu program before submitting final draft?
 - a. This is a personal preference based on student and faculty work models. Please be mindful of the fact that when copying from Word document formatting can be lost.

10. Will a faculty member be able to track changes for students?
 - a. NO, but they can make changes and add comments to protocols in progress. Student can then be emailed to be notified of changes.

11. What are the character limits for the form boxes?
 - a. There are no character limits on the general text boxes.

12. Can an existing protocol be copied?
 - a. Currently, NO. This functionality will be added next year; modification is the only option at this time.

13. Will the protocol lock so that two people cannot edit at the same time?
 - a. NO, the protocol does not lock when two or more people are editing at the same time. Please coordinate and plan accordingly with your collaborators.

14. Is there a notice that appears on screen when two people are accessing the same protocol at the same time?
 - a. NO, not at this time.