

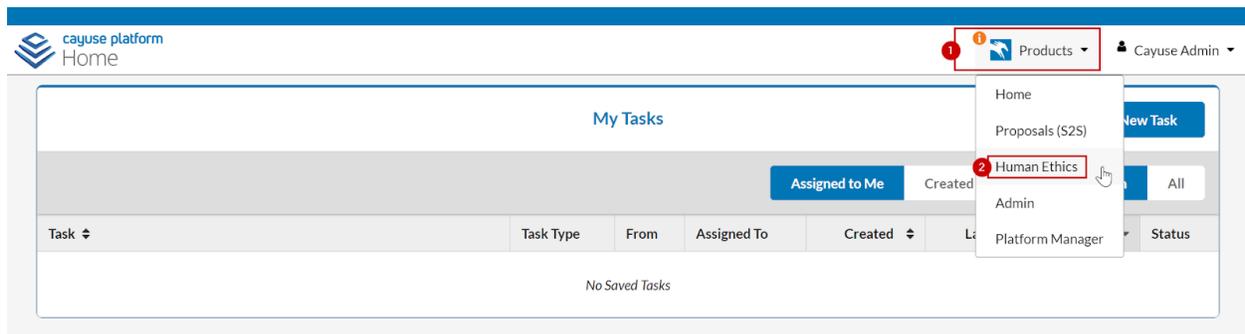


Your institution's instance of Human Ethics (HE), AKA Cayuse IRB, will be moving to the new Cayuse platform. This is largely a background change to improve future operations but there will be a couple of things you will notice are different, including a new landing page and a new way to navigate to HE.

Quick Guide

The following is a short version of what you need to know, below this are sections that go into a little more detail on each change.

- After [DATE OF PROD GO-LIVE] please use the new URL of: <https://csusb.app.cayuse.com> for accessing Cayuse.
- The login screen and credentials will be the same.
- The landing page after login is different and will look like the image below.
- Click on the Products menu in the upper-right corner and select Human Ethics to go to HE.
- Everything else is pretty much the same.



For more details, see the sections below.

URL (Address)

The URL or web address for the site will be changing slightly. The current URL is:

https://csusb.cayuse424.com

The new URL will be:

https://csusb.app.cayuse.com

The main thing to keep in mind with this URL change is that if you are using a bookmark, your browser history, or an old email to go to the site, those links may not work after [DATE OF PROD GO-LIVE]. Instead, you will want to use the above new URL to access the system after [DATE OF PROD GO-LIVE]. Once logged in you can navigate to HE and then make a new bookmark to save the new URL.

Note: *some browsers will attempt to autocomplete a URL as you type it in. Keep in mind that your browser will not know what the correct URL is if you have not already visited the new site, so avoid going to the suggested autocompleting versions of the address until you have logged in successfully at least once. One way to side step this problem is to simply copy and paste the new URL into your browser's address bar and then press Enter rather than typing and giving the browser a chance to autocomplete.*

Logging In

Your login method and credentials are not changing. You will be logging in through the same CSU San Bernardino portal you are already accustomed to. There is also no change to your username or your password, so all of that will be exactly the same after [DATE OF PROD GO-LIVE] and no action is required on your part.

The Landing Page (Home)

The main difference you will notice is that after logging in there is a new landing page that comes up before Human Ethics (HE) appears. This is called the Home Page or the My Tasks page and contains one the new platform's new features: Tasks. For more information on the new Tasks feature see this Help Center article:

<https://support.cayuse.com/hc/en-us/articles/360053608313-Creating-and-Completing-Ad-Hoc-Tasks>

The Tasks in the My Tasks landing page are currently separate from the Tasks within the Human Ethics module, so be aware that to see your current IRB related Tasks you will want to navigate to the HE module.

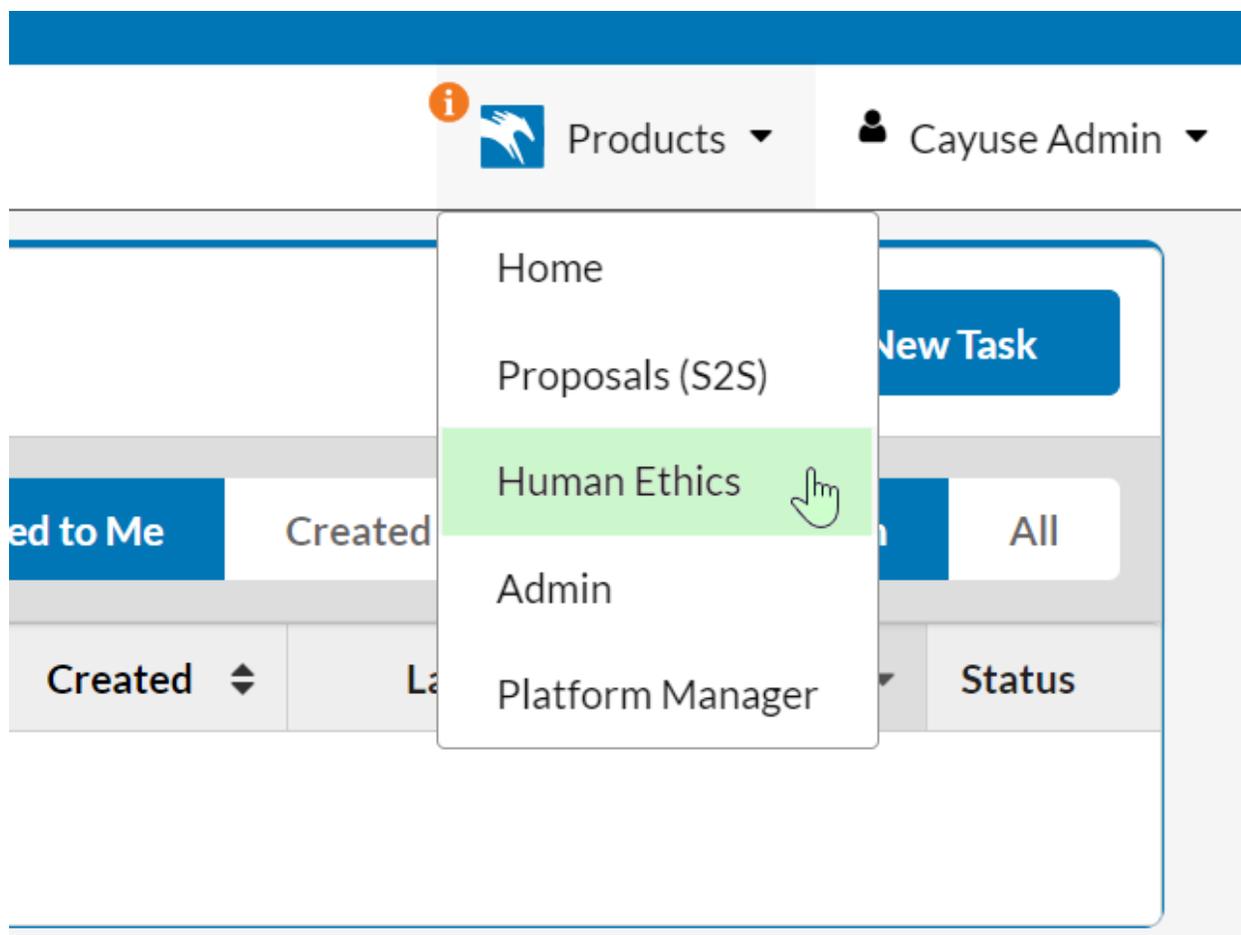
Note: you do not need to use the new Tasks feature for anything, it is completely optional, though some institutions may eventually want to integrate the feature into their workflow.

The thing to look for on the landing page is the Product Switcher. Clicking this menu will show Human Ethics as an option, clicking the Human Ethics option from this menu will take you to HE AKA Cayuse IRB.

The screenshot displays the 'My Tasks' interface on the Cayuse Platform. At the top left, the logo reads 'cayuse platform Home'. On the top right, the user 'Carlos West' is logged in, and a 'Products' dropdown menu is highlighted with a red box. The main section is titled 'My Tasks' and includes a '+ New Task' button. Below this are filter tabs: 'Assigned to Me' (selected), 'Created by Me', 'Open', and 'All'. A table lists the tasks with the following data:

Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
Submit progress report.	SP Ad Hoc Task	Me	Me	09/21/2022	09/21/2022	09/22/2022	Open
Make edits needed before routing.	SP Ad Hoc Task	Me	Me	11/22/2022	11/22/2022	11/26/2022	Open

At the bottom of the table, there is a '10 per page' dropdown and the text 'Showing 2 of 2 items'. A help icon with a '3' is located in the bottom right corner.



Human Ethics on the New Platform

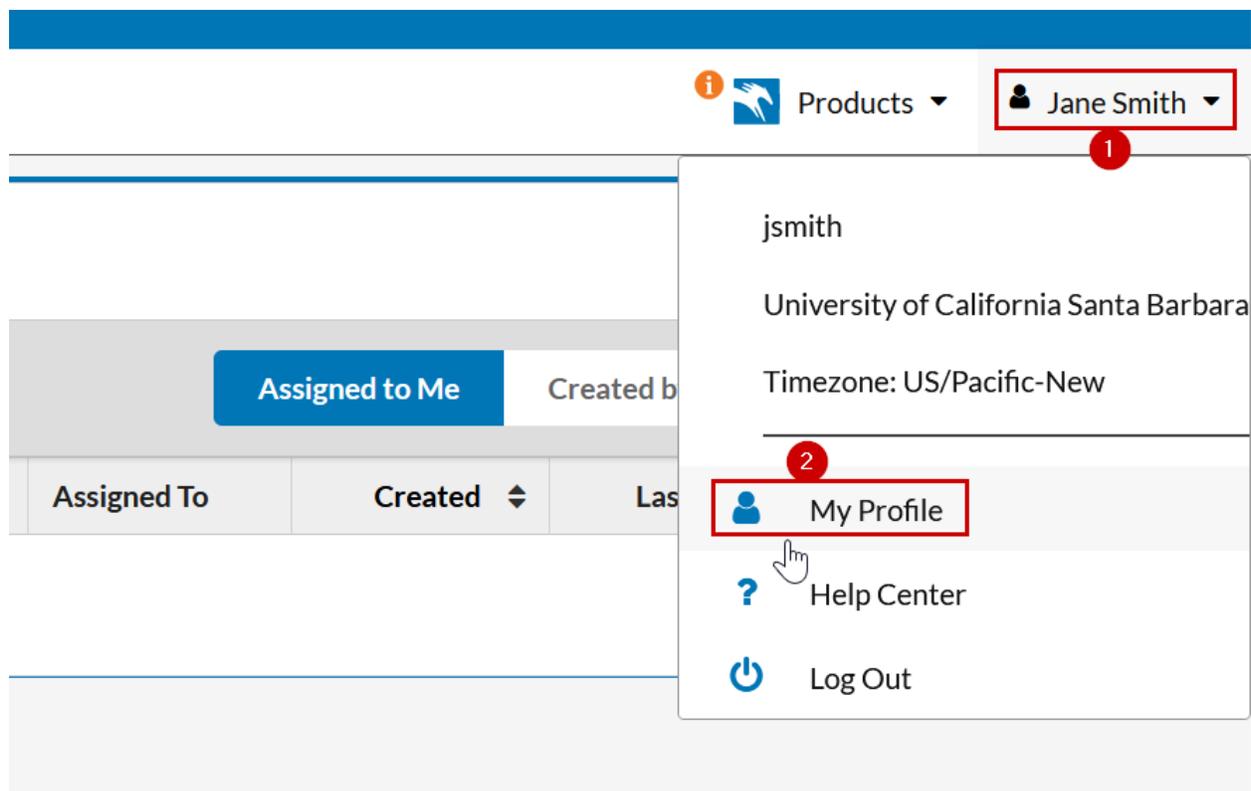
Once you have navigated to Human Ethics (HE) the Dashboard of the application will load just as it normally would. There are no changes to how the application works, all Studies and Submissions will function just the same and you can pick up wherever you left off using the system.

The one visual change is to the header area of the application. You will notice the same header bar and product switcher as appeared in the home page now appears over HE as well. Though this does not impact how HE functions it does offer a way to navigate to other Cayuse modules.

My Profile

Different organizations have different ways of maintaining up-to-date information in your professional profile in HE but some will defer to you to update your own profile when there are changes to things like your name and contact information. If your institution prefers you keep your own information up-to-date in Cayuse then how you navigate to your profile will be different on the new platform.

Instead of going to the People tab in Proposals (S2S) you will click on your name in the upper-right corner of the screen and in the resulting menu select My Profile.



Note: though the above image shows this happening in the Home/My Tasks page, this can be done from any place in Human Ethics (HE) as well, since the header area is always there.

When in your profile you will use the left navigation pane to move to different sections and your browser scroll bar on the right to move up and down within a section. Areas that are grayed out are areas that only a central administrator can edit, so if an edit is needed in

a grayed-out area then you will want to contact your admin team about making that change.

My Profile
My Profile / Jane Smith / Profile

Profile

Cancel Save

First Name * Jane **Middle Name** **Last Name *** Smith **Active** Yes

Prefix **Suffix**

Preferred Name **Employee ID / Personnel Identifier**

Degrees & Qualifications

Cancel Save

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