

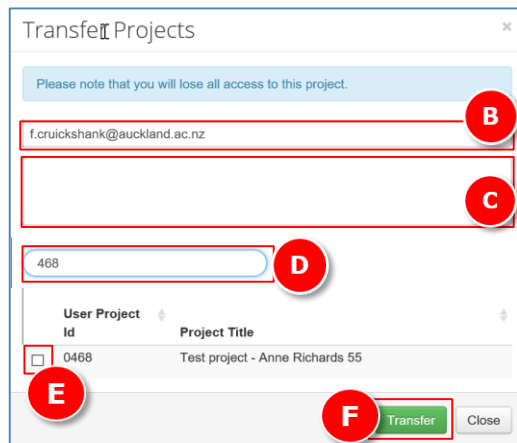
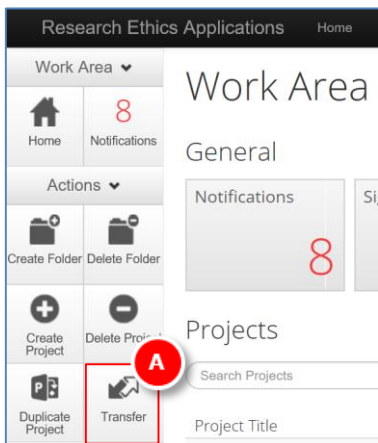
1. Introduction

This quick guide outlines the steps a Student takes to transfer application ownership to their Supervisor. NB – The Student will lose all access to the application after transferring and the Supervisor will have to share the application with the Student before they can do any more work on the application.

2. Student - Request to transfer an application

Log into Infonetica Ethics RM

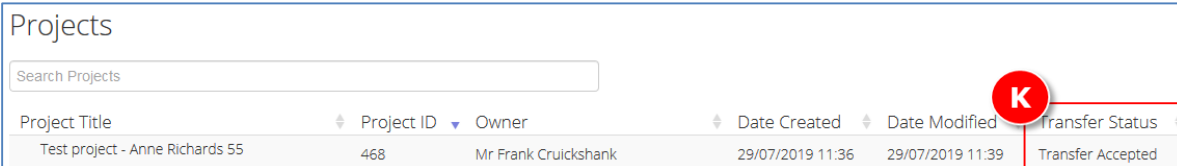
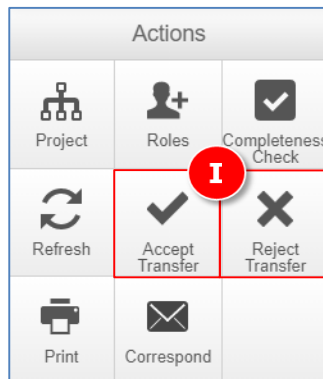
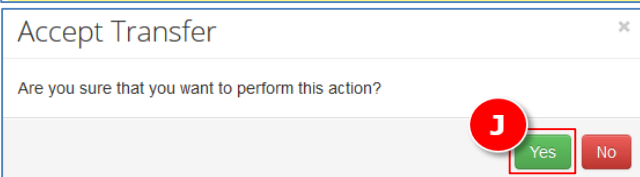
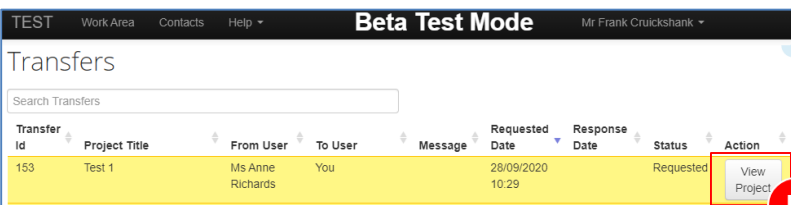
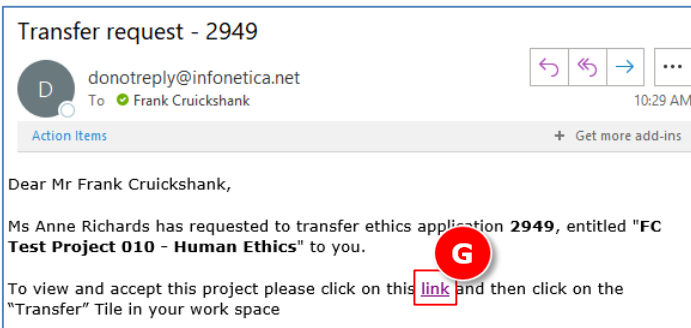
- A. Click on the **Transfer** action button
- B. Type in the email address of the Supervisor
- C. Type in any message
- D. Search for the project
- E. Tick the box beside the project
- F. Click on the **Transfer** button



3. Supervisor – Accept (or reject) transfer of application

The Supervisor will receive an email advising that they have an application transfer request

- G. Click on the **link** to open Infonetica Ethics RM
- H. Click on the **View Project** button
- I. Click the **Accept Transfer** action button (or **Reject Transfer** if not willing to take over the application)
- J. Click **Yes**
- K. The **Transfer Status** is now showing as **Transfer Accepted**



See over for instructions on how to then share the application with the Student.

5. Share Role with the student

A. Select the relevant **Project** from list

Work Area

| | | | |
|---------------|------------|-----------|--------|
| Notifications | Signatures | Transfers | Shared |
| 27 | 3 | 0 | 0 |

Projects

Search Projects

| Project Title | Project ID | Owner | Date Created | Date Modified | Transfer Status |
|---------------|------------|----------------------|------------------|------------------|-------------------|
| Test 1 | 20744 | Mr Frank Cruickshank | 28/09/2020 10:27 | 28/09/2020 10:28 | Transfer Accepted |

B. Click on the **Roles** action button

Actions

- Project
- Roles**
- Completeness Check
- Refresh
- Print
- Correspond

C. Enter the student's email address

NB All PhD, Masters and Honours students will be set up within Ethics RM with their @aucklanduni.ac.nz email address, e.g. fcru139@aucklanduni.ac.nz

D. Select the role **Read/Write** from the drop down menu

E. Click on **Share Role**

Share Roles

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

Collaborator email

Collaborator email Read Only (e.g. Collaborator) +

Note: This form has not yet been shared with anyone.

Read Only (e.g. Collaborator)

Read/Write (e.g. Co-Investigator, Student)

Share Role Close

Points to note:

- The student will receive an email notification including a link through to the form
- They will then be able to complete the rest of the application
- They will inform you when they have completed the form, allowing you to then review and add any comments for them to make further updates
- Once complete you will be able to submit the application for sign off (the student will not be able to submit the application for sign-off)

NB Students will not be able to submit the application for sign off