

Follow Up Manager

Think of the Follow Up Manager as your own personal tickler file that can be very useful in helping you track receipt of material you have requested (e.g., a check or a progress report). You choose how often you want or need to view this screen in order to check on what's due (or past due). The Follow Up Manager and Letter Manager work in concert with each other.

The process starts when you choose a letter to send (whether standard or template). The Letter Manager displays, ready for you to "prepare" the letter for sending via mail or email. The information appearing in the Follow Up Manager is governed by what is entered in certain fields in the Letter Manager screen, specifically Response Required, Date to Follow Up, and Date Required. When you then click the Send/Print button, the letter is recorded to the ProIRB database. (Remember that you may preview a letter while in the Letter Manager screen and even print it using File/Print, but you must use the **Send/Print** button if you want ProIRB to record the letter in the Follow Up Manager).

A list of these letters can then be viewed within the Follow Up Manager, accessed from the Main Menu screen. **Every** letter you create via the Send/Print button in the Letter Manager screen will be recorded to the Follow Up Manager, **whether or not you checked Response Required** while preparing it in the Letter Manager. Images referenced as Figure 1, etc. are included at the end of these instructions. Dates shown are for demonstration purposes only.

Click the **Follow Up Manager** button from the Main Menu to display the Follow Up Manager screen (see Page 2, Figure 1). A discussion of the various parts of the screen follows:

Letter Display Options:

What you see in the bottom half of the screen is determined by which of the four radio buttons you select under Letter Display Options.

The Follow Up Manager screen will always initially display with **Response Required–OPEN** selected by default and today's date showing under **For Follow-Up On or Before**. The words Response Required in three of the radio button labels indicate that the letters displayed below will be those in which you checked Response Required, entered a Date to Follow Up, and entered a Date Required while in the Letter Manager. Select the **All Letters** button to display **ALL** letters **sent via Send/Print** in the Letter Manager screen, including those for which you did **not** check Response Required.

Calendar:

You may use the calendar to choose a different month and day to view what may be due at a future time. *Click* the **Switch to Today** button to return to today's date.

If you select the All Letters button, however, a date of 12/31/2099 will automatically display (see Page 3, Figure 2). In this case, you may simply select another radio button for the date to return to today's date without having to click the Switch to Today button.

Columns:

1. **F/U** - Will have a check mark if Response Required was checked at the time the letter was created via Send/Print button from the Letter Manager screen.
2. **F/U Date** - Plugged in here from what was entered in the Date to Follow Up field in the Letter Manager

screen. This is a date you may wish to check frequently to see what you still haven't received or needs to be done. You may decide another letter needs to be sent if this date has passed.

3. **Letter** - The "type" of letter, if a standard one, or "template name" should clue you into what activity or expected material(s) may need to be followed up on. You cannot double click here to open the item (letter).
4. **To** – The Addressee checked on the Letter Manager screen followed by the word Post (e.g. PI Post) if checked to print out for mailing or Email (e.g. Coord Email) if checked to send letter as an attachment to an email.
5. **Date Sent** – Plugged in here from what was entered in the Letter Date field in the Letter Manager screen. For emails, the **Date Sent** column will show the date on the letter attached to the email rather than date the email itself was sent (it is assumed they will usually be the same date).
6. **Due By** – Plugged in here from what was entered in the Date Required field in the Letter Manager screen. This was the last possible date you expected a response or receipt of material(s).
7. **Recv'd** and **Date** – Are currently blank. Whenever you do receive the response or material you were requesting, **enter a CPA** for that study. When you click the Save Data button on the CPA screen, the Follow Up Letter Maintenance screen will open (see Page 3, Figure 3), displaying any outstanding letters for that particular study. This is where you *check* the Recv'd column for the specific letter. Today's date will be automatically entered (You may highlight and change this date, if needed).

TROUBLESHOOT: The procedures in #7 should be used so that letters are properly "closed out" in the way ProIRB intended via the Follow Up Letter Maintenance screen. You are able to check the Recv'd column within the Follow Up Manager screen itself, but please use sparingly and only if absolutely necessary.

TROUBLESHOOT: If you mistakenly created more than one letter with the same material requested and on the same date, you may delete the duplicate(s) by left clicking the small gray square to the left of the row so that the entire row is highlighted, and then right click and choose Delete Record.

Buttons:

Follow Up Report – May be viewed or printed out as a planning tool or report.

Send Follow Up Letter – Not able to currently use.

OTHER INSTRUCTION REFERENCES:

Letter Manager

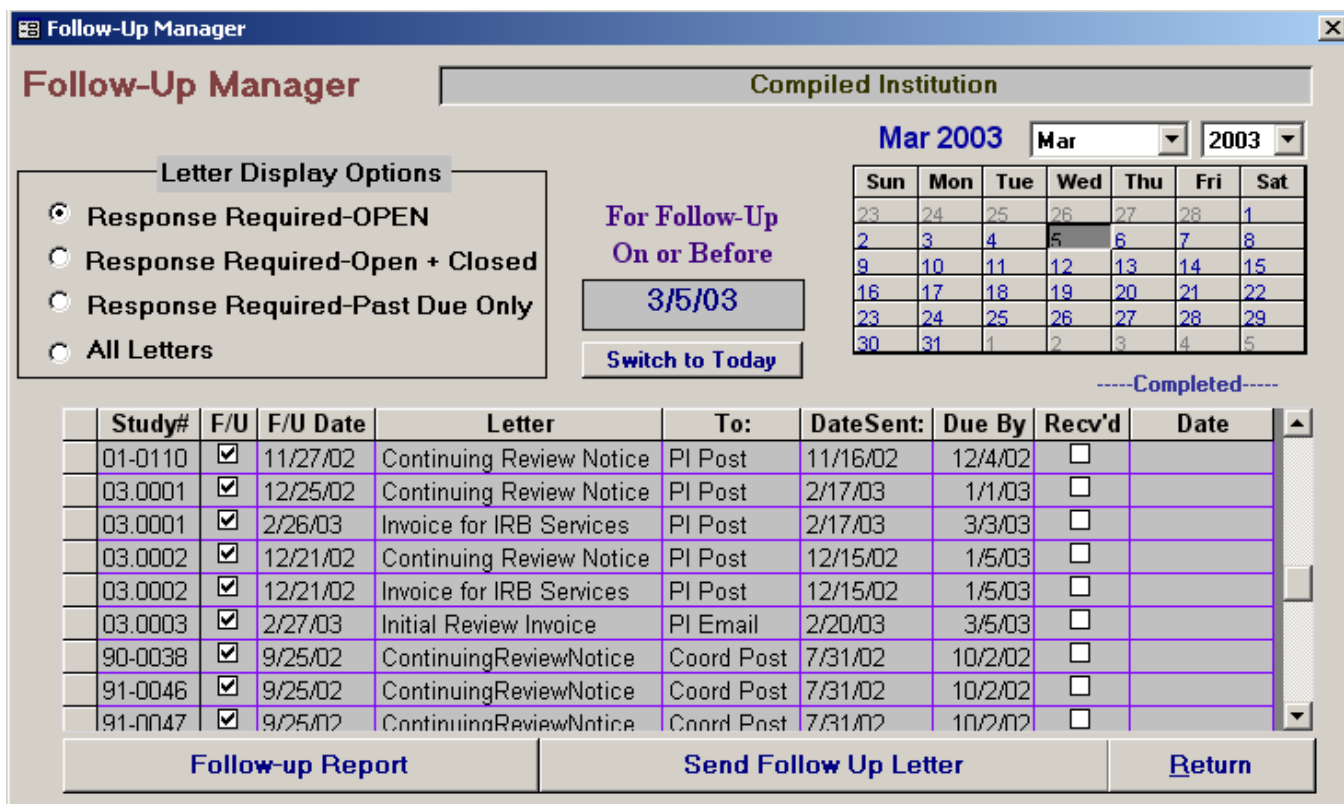


Figure 1

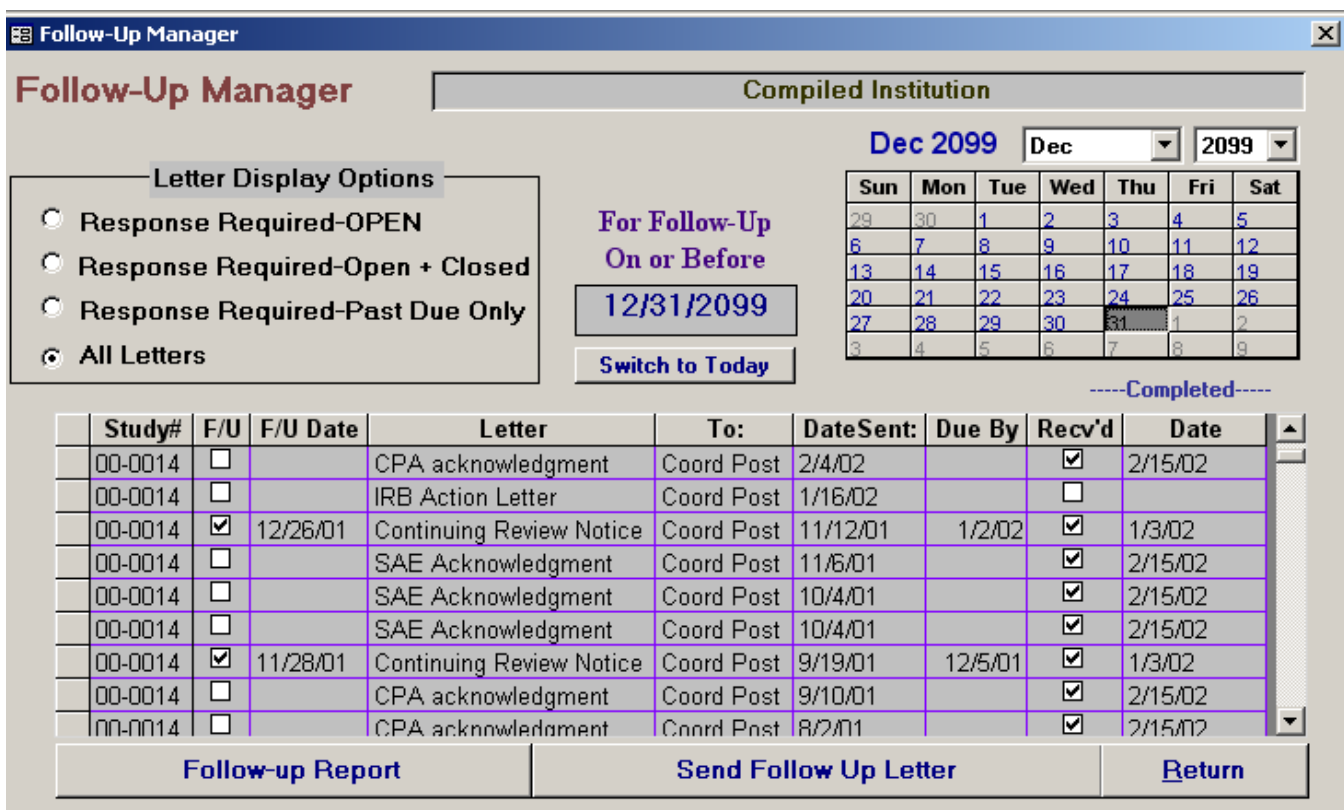


Figure 2

ProIRB[®]
by ProIRB Plus, Inc.

Follow Up Letter Maintenance

Follow-Up letters for Study #

Complete the Received Check Box and Date for the Letter this CPA applies to. **Rec'd?**

DateSent:	To:	Letter	FU Rqd	FU Date	Due By	Rec'd?	Date Rec'd
12/15/2002	PI Post	Continuing Review Notice	<input checked="" type="checkbox"/>	12/21/2002	1/5/2003	<input type="checkbox"/>	
12/15/2002	PI Post	Invoice for IRB Services	<input checked="" type="checkbox"/>	12/21/2002	1/5/2003	<input type="checkbox"/>	

Figure 3