RÉSEAU DE SANTÉ vitalité HEALTH NETWORK

Vitalité Health Network Research Ethics Board

INFONETICA Portal

Guide for Researchers and Research Team Members

Version: June 16, 2026

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What is Infonetica?

Infonetica is an online portal used to submit and manage research projects to Vitalité Health Network's Research Ethics Board (REB).

This platform allows users to submit to the REB:

- new research projects for ethical review and approval;
- amendments to approved projects;
- requests for renewal of ethical approval;
- notifications of any unexpected events (local or external) and any protocol deviations;
- suspension or termination of a research project.

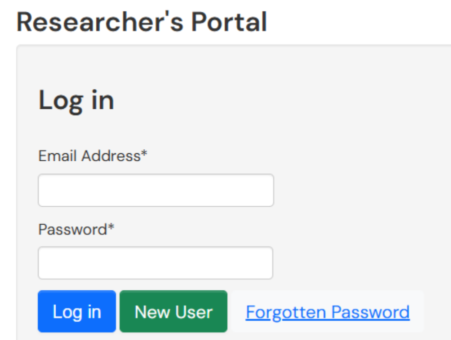
If this guide does not answer all your questions or if you need additional information, please write to infonetica@vitalitenb.ca.

Log in to Infonetica

Access Vitalité Health Network's REB Infonetica portal from any location with Internet access by clicking on the following link:

https://appl.cer-reb.vitalitenb.ca

Don't forget to bookmark this link!

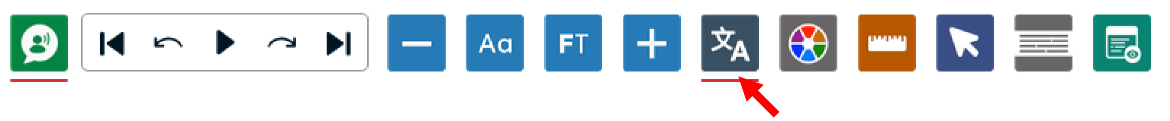


Browse in French

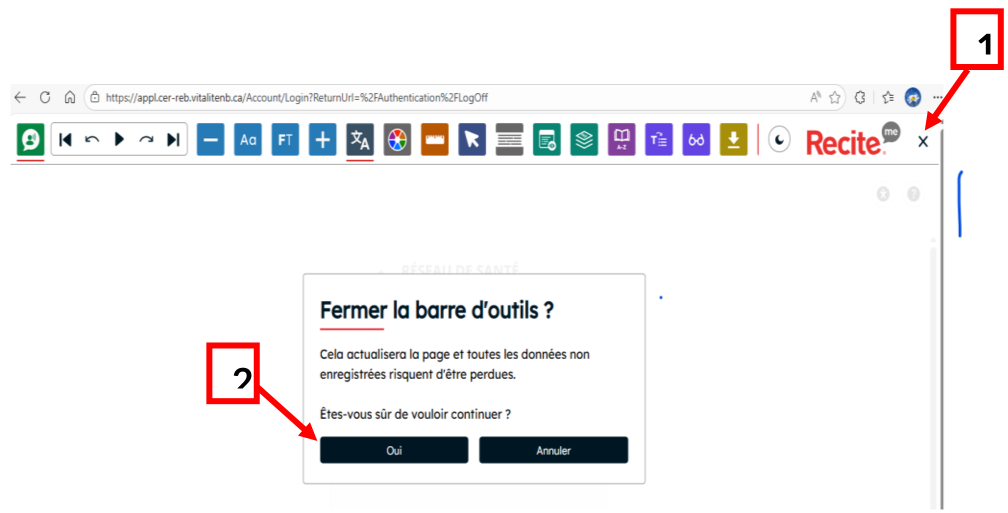
On the login screen, follow the steps below to navigate the portal in French:

1. In the upper right-hand corner of the screen, click on the following icon (circled in r

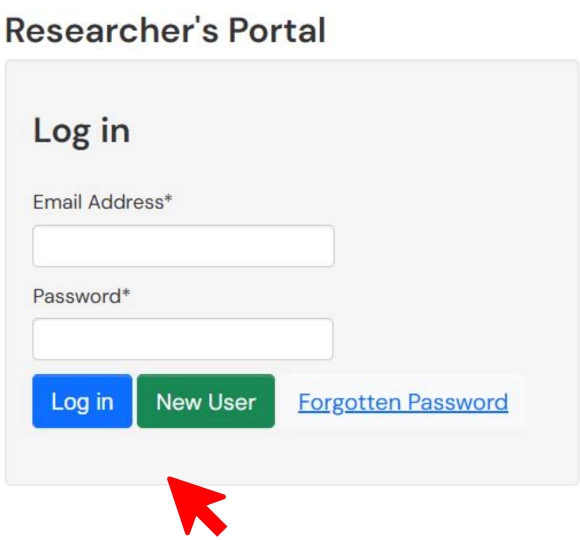
2. Then click on the Translation button indicated by the red arrow below:



3. Enter ***French*** in the designated field, then select one of the results that appear.
4. Close the toolbar by clicking the ***X*** on the right. A pop-up window will appear to confirm the action: click ***Yes***. Once this step is completed, the entire portal will display in French.



Important: Despite our efforts to provide a portal available in both official languages, please note that due to automated translation, some elements may not be translated perfectly, may not be translated at all or may appear in a different order than intended.



Users who already have an account in the former ROMEO portal

The basic data for research projects / clinical trials that were still active in the former ROMEO portal have been migrated into a form called the ***Migration Data Form*** in the Infonetica portal.

ROMEO users **whose accounts were linked to a clinical trial or a research project that is still active** can access it in Infonetica by following the steps below:

1. On the Infonetica home page, click on the ***Forgotten Password*** function.

2. Enter the email address you used in the ROMEO portal. A message will automatically be sent to that address to allow you to reset your password.

3. This email contains a secure link: click on the link to create a new password and access your account in the new portal.

   If you do not receive the message after a few minutes, check your ***Junk*** or ***Spam*** folder. If you still did not receive the email, the address you entered may not match the one associated with your ROMEO account. In that case, try another address or contact infonetica@vitalitenb.ca for assistance.

4. Once your account is activated, open the Infonetica login page using the following link and enter your login information: **https://appl.cer-reb.vitalitenb.ca**

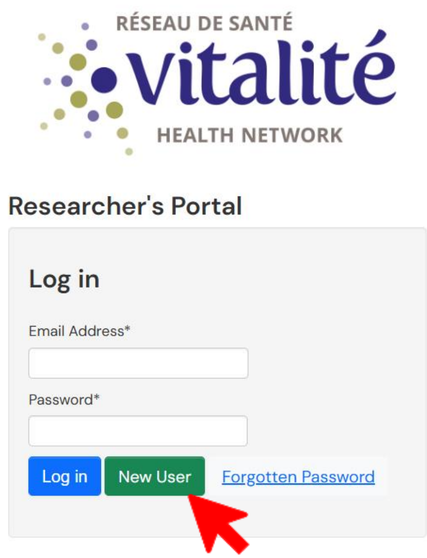
A successful login will take you to your work area, where you will find a summary of your active projects.

IMPORTANT: For logistical and administrative reasons, only the basic information required for submitting amendments, requesting annual ethics approval renewals, and sending any other notifications to the REB has been migrated into Infonetica. However, the REB has retained copies of all previously submitted ethics review applications in its records.

New users

Users of the former ROMEO portal whose accounts **were not associated** with an active clinical trial or research project must create a new profile in the Infonetica portal.

Create an account



1. Click on this link: https://appl.cer-reb.vitalitenb.ca.
2. Click the ***New User*** button.
3. Make sure to complete all required fields and ensure that your password meets all requirements. These requirements will appear in a pop-up window. Check the box to indicate that you accept the terms and conditions.
4. Click ***Register***. You will receive a message informing you that an activation email will be sent to the email address associated with this account.

⚠ If you do not receive the activation email after a few minutes, remember to check your ***Junk*** or ***Spam*** folder. It may also have been intercepted by your anti-spam filter, firewall, or another security system. Please contact the system administrator at infonetica@vitalitenb.ca if you need to, so they can help unblock it.

5. Click the activation link. Your account will now be activated and you will receive a message confirming this.
6. Once your account is activated, open the Infonetica login page using the following link and enter your login information: https://appl.cer-reb.vitalitenb.ca.
   A successful login will take you to your work area, which includes navigation tiles.

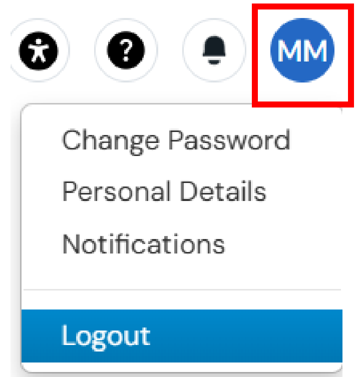
Forgotten password

Password reset

If you do not remember your password or if you receive a message indicating that the password you entered is incorrect, you can reset it:

1. On the login page, click ***Forgotten Password***.
2. Enter the email address associated with your account and click the ***Reset Password*** button.
3. A message will appear indicating that your request has been sent. Click ***Return to Login***.
4. You will receive an email containing a link that will allow you to change your password. This email may be in your junk/spam folder or may have been blocked by your firewall or institution. If you do not receive this email, you can write to infonetica@vitalitenb.ca to have your password reset.
5. Enter your new password in the designated field and then confirm it in the second field. Both passwords must match.
6. Click ***Reset Password***. A message will then appear confirming that your password has been reset.

Manage your account and preferences



In the upper right-hand corner of the screen, you will see the account name. It displays the account holder’s initials and contains their information. You can click this button to change your password, update your personal information, access notifications, and log out.

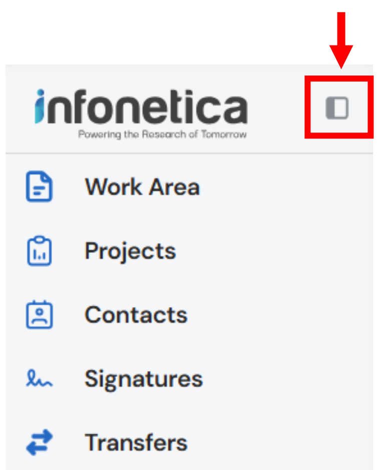
Logout

To log out of your account, click ***Logout*** under your initials in the upper right-hand corner of the portal.

IMPORTANT: For security reasons, the system **will automatically log you out after 30 minutes of inactivity**.

Navigating the portal

Home page



The home page is called the “**Work Area**.” It includes several sections. There are four tiles at the top centre of the screen. These tiles contain information about notifications, signatures, transfers, and the projects and forms to which you have access.

If the menu does not appear, move your cursor to the left side of the screen to make it slide out. Then click the button shown in the image to keep the action panel pinned open, if you wish.

The menu bar contains the following sections:

Work Area
Allows you to return to your work area from anywhere in Infonetica.

Projects
Groups all your projects.

Contacts
Allows you to save the contact details of project team members. *Add contact* buttons appear within the forms so you can you add a new contact.

Signatures
Displays information related to electronic signatures that have been requested or completed. This information is also accessible from the tiles in the work area.

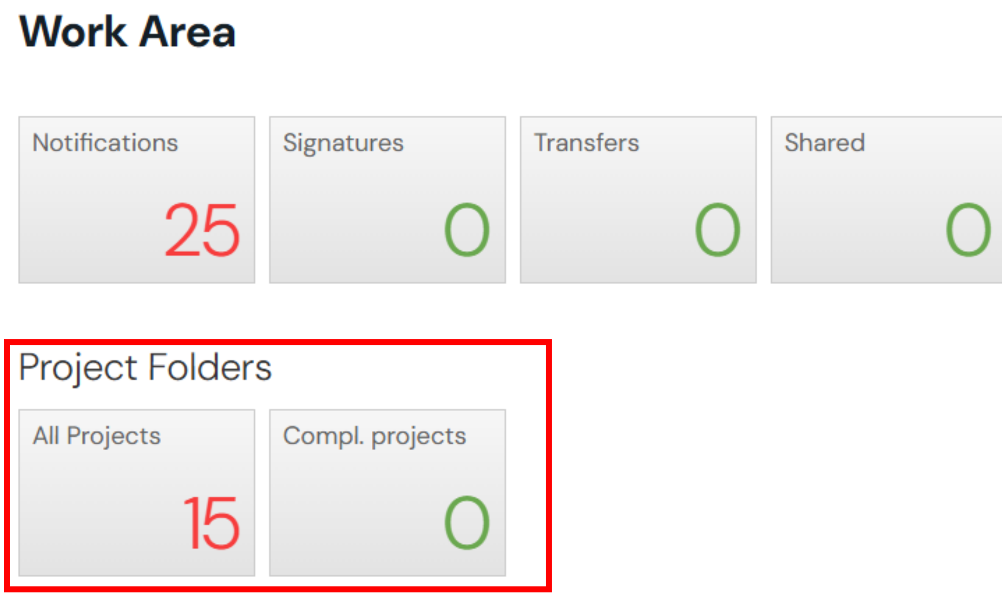
Transfers
Displays the projects you have transferred as well as those that have been transferred to you. This information is also accessible from the work area tiles (***Notifications***).

Work area

All projects are listed together on the Work Area home page.

Organize your projects in Infonetica

You can create separate folders to organize your research projects. Folders are displayed in the order they are created.



Projects that have been placed in a folder will not be displayed on the Work Area until the folder has been selected. Once a project has been moved into a folder a second folder will appear with the name ***All Projects***. This enables you to search for a project in all folders.

To create a folder:

1. Click the ***Create Folder*** button in the middle of the Work Area home page, then enter a folder name and click ***Create***.

To delete a folder:

1. Click the ***Delete Folder*** button in the middle of the Work Area home page, then select the name of the folder you want to delete.

Action buttons

When the main form — or the ***Migration Data Form*** in the case of projects migrated into Infonetica — associated with a research project initial review request is selected, new action buttons will appear above the form.

Create Sub Form
Allows you to create a sub form to submit an ethics review request or a notification to the REB for a project that has already been approved. Examples: amendment, renewal of ethics approval, protocol deviation, end-of-project notice, etc. However, you may only submit amendments or other requests once your initial project approval request has been formally approved by the REB.

Share
Allows you to view, edit, and manage the form by assigning permissions to other users.

Roles
Allows you to assign a predefined role for this form to other users.

Completeness Check
Allows you to identify the mandatory questions in the form that must be completed before submission. These questions are also marked with a red asterisk on the forms.

Submit
Allows you to submit the form (the ethics review request) to the REB.

More
Provides access to additional actions that are not displayed on the screen.

Role sharing and collaboration

Transfer project ownership in Infonetica (*Transfer* button)

The ***Transfer*** button allows you to transfer the ownership of a project or form that you own in your Infonetica account to another existing account. The project is then removed from your account, and you no longer have access to it (unless the new owner adds you as a collaborator).

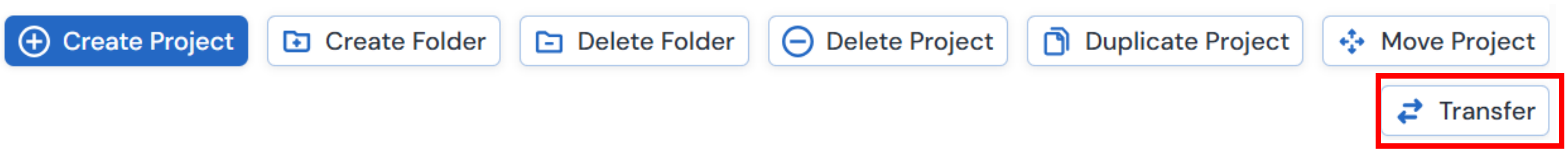
Examples of situations in which this function can be used:

- when the project owner in Infonetica plans to leave the project;
- when the project owner plans to leave the project for a period of time, for example during maternity leave;
- when there have been changes within the project team and the owner needs to transfer ownership of the project to another team member, even if the original owner will remain a collaborator.

Transferring ownership is an **administrative** action in Infonetica. A notice of change of principal investigator or an amendment must still be submitted to the REB, if applicable, along with the amended documents.

To transfer the ownership of one or more projects in Infonetica (Vitalité):

1. In the Work Area, click the ***Transfer*** button. The ***Transfer Projects*** pop-up window will open.



2. In the ***Email Address*** field, enter the address of a person who already has an account in Infonetica and to whom you wish to transfer the project(s).
3. As you begin typing the email address, matching names will appear in a drop-down menu. Select the appropriate entry, then press the ***Enter*** key on your keyboard.
4. Once the person's email address has been selected, enter a message for them in the designated field (optional).

5. At the bottom of the pop-up window, you can use the search function to locate one or more projects to transfer. You can also select the project(s) from the displayed list, then click the ***Transfer*** button.
6. An automated email and notification are sent to the person. They must accept the transfer for it to be completed, but they may also reject it.
7. Once the transfer is accepted, the project no longer appears in the account of the original owner. If needed, a pending transfer can be cancelled.

The process is essentially the same for a specific form.

Accept or reject the transfer of a project or form

The person designated to receive the project or form transfer will receive a request in the ***Transfers*** tile of their Work Area. By clicking this tile, a list of transfer requests will appear.

They can navigate to each project and choose to accept or reject the transfer:

1. By clicking ***View Project;***
2. In the new window, they must click the ***Accept Transfer*** or ***Reject Transfer*** button. Depending on the display, these buttons may appear immediately or may be accessible by selecting the ***More*** button.

Share a project with other users (Roles button)

Other Infonetica users can collaborate on specific project forms.

To invite someone to collaborate:

1. Click on the appropriate project name in your Infonetica Work Area.
2. Click the ***Roles*** button (depending on the display, these buttons may appear immediately or may be accessible by selecting the ***More*** button).
3. Enter the user’s email address, then select the role you wish to assign to them.
4. Then click the ***Share Role*** button.

Assign access levels to other users

To invite other users to collaborate with you by assigning them different access levels:

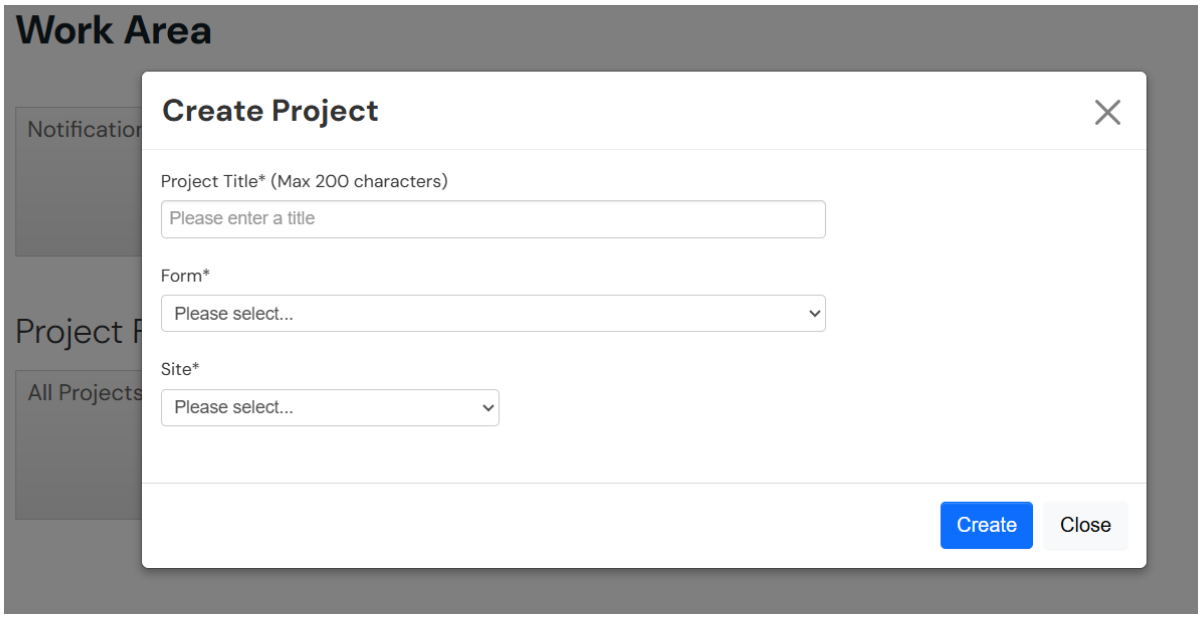
1. In the Work Area, click on the name of the research project.
2. Click the ***Share*** button.
3. Enter the email address of the Infonetica (Vitalité) user you wish to invite to collaborate.
   The address should appear automatically as you begin typing it in the field. If it does not, this means it is not associated with an active account. You will then need to contact the person to confirm the correct email address or invite them to create an account in Infonetica (Vitalité).
4. Select the type(s) of permission(s) you wish to assign them from the available options.
5. Click the green "**+**" symbol to add any other users you wish to invite to collaborate.
6. Click the ***Share Role*** button to send the sharing requests.

New ethics review request

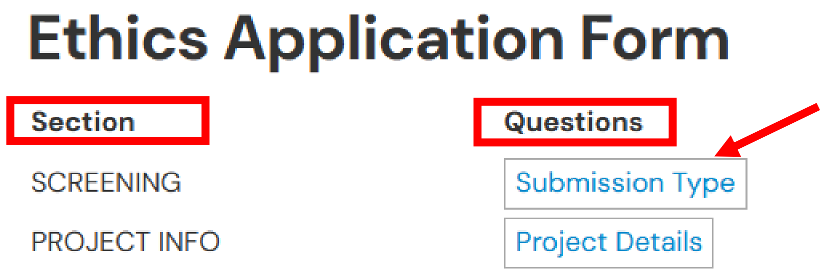
New research project / clinical trial

To submit a new research project / clinical trial:

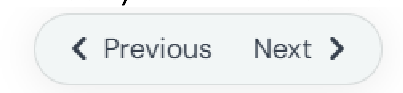
1. In the Work Area, click the blue ***Create Project*** button in the middle of the page.
2. In the pop-up window, enter the project title, then select the ***Ethics Application Form***.



3. Click the ***Create*** button. This will create a new project folder in Infonetica. It will then appear in the list of projects in your Work Area.
4. The form is divided into several pages, allowing you to quickly return to a specific section or page. Each section title appears on the left, and the pages within that section appear on the right, as shown in the image below. Click on the first question page to begin completing the form.

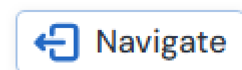


5. Once you have answered the questions on a page, click the ***Next*** button at the bottom to move to the next page. The completed page is saved automatically, but you can also click the ***Save*** button (available directly or from the ***More*** menu) at any time in the toolbar at the top of the form.



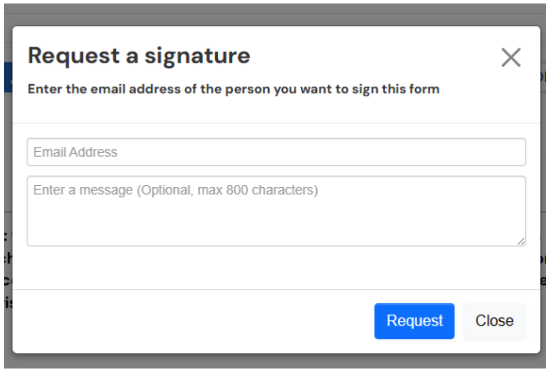
Note: Some questions are mandatory and are identified with a red asterisk (*). Certain questions are also linked to others and will only appear based on the answers you provide. For this reason, you may not be able to access some sections/pages of the form.

6. You can click the ***Navigate*** button at any time to return to the form's home page and then access the desired section/page.

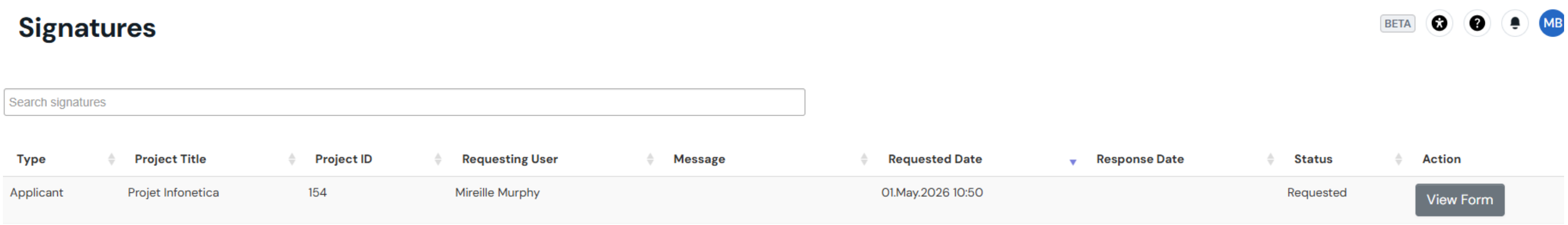


7. To add the name of a Principal Investigator, Co-Investigator, or project team member, click in the ***Search*** field provided for this purpose in the ***Project Team*** section. Note: These individuals must already have an Infonetica (Vitalité) account before they can be added.

8. Upload all your relevant documents at the end of the form, then sign the form using your email address and password. If a signature request is required:
    a. Click the ***Request a signature*** button.
    b. In the pop-up window, enter the person's email address and a message, if desired, then click the ***Request*** button.
    c. The person will receive an email with a link allowing them to access the form in Infonetica after entering their email address and password.
    If they do not yet have an Infonetica (Vitalité) account, a message will appear to inform you. You will then have the option to invite them to create one. Once this step is completed, an automated email will be sent to the person to notify them of the request. As soon as they have created an account, the signature request can be completed.



    d. The signatory must then click the ***View Form*** button in Infonetica. The form will be accessible in read-only mode.

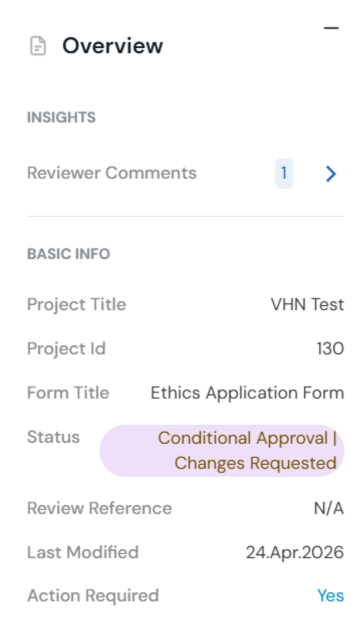


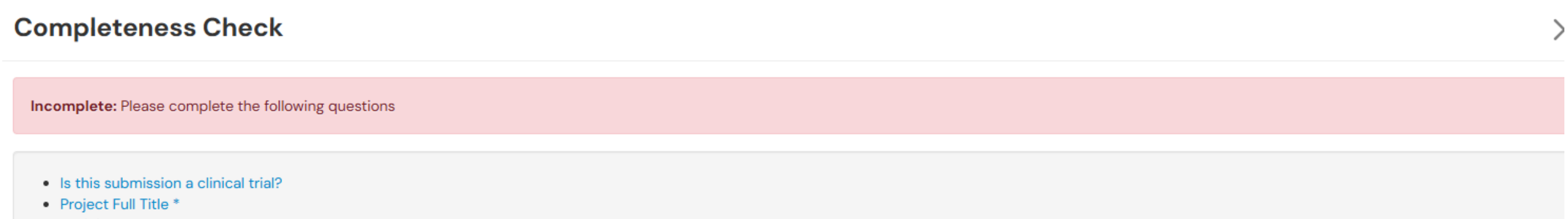
    e. They must then click the ***Sign*** or ***Reject*** button in the action bar at the top of the form, and enter their email address and password.
    f. You will then receive an email informing you that your signature request has been accepted or rejected.
    g. Access the form from the Work Area in Infonetica to ensure that it has been successfully submitted to the REB. If it has not, click the ***Submit*** button to complete the process.

9. The ***Overview*** panel on the right side of the form displays its status, as well as its reference number (***Review Reference***), which corresponds to the number assigned to your submission. A new number is generated each time a new submission is sent to the REB.

10. **IMPORTANT**: If you signed the form yourself, make sure to click the ***Submit*** button at the top of the form if it is available. The form may also be submitted automatically as soon as you sign it electronically. A message will appear confirming that your ethics review request has been submitted, and you will also receive an email confirmation.

11. If some mandatory questions have not been answered, the system will prompt you to do so before allowing the submission. The ***Completeness Check*** window will open and display links to each missing question. Click on the first link, answer the question, then select the ***Completeness Check*** button again to access any remaining questions, if applicable.

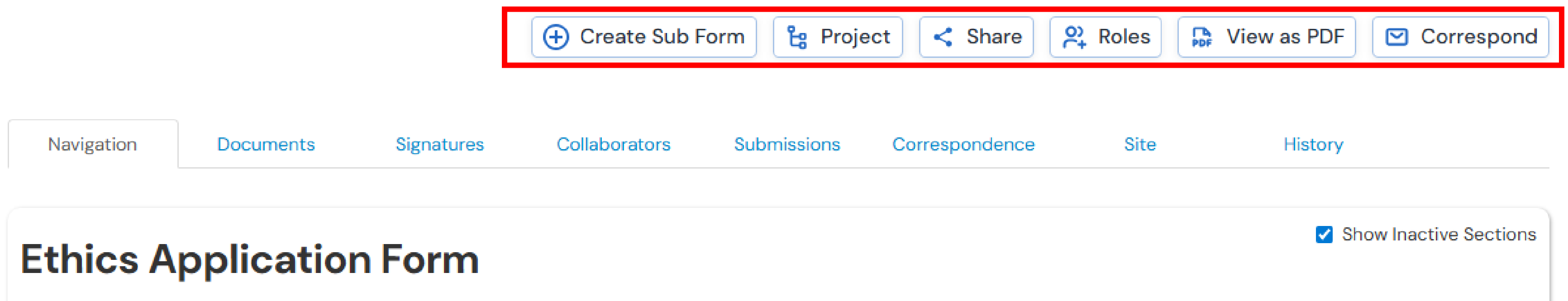




Other requests to the REB (amendment, etc.)

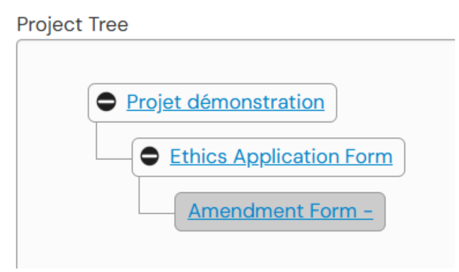
For research projects / clinical trials that were migrated into Infonetica, the main form from which you can submit sub forms (amendment, annual ethics approval renewal, etc.) is called the ***Migration Data Form***. The form for a new ethics review request for a research project / clinical trial initiated in Infonetica is called the ***Ethics Application Form***.

When the main form associated with the initial ethics review request for a research project / clinical trial has been approved by the REB, action buttons will appear at the top of the form:

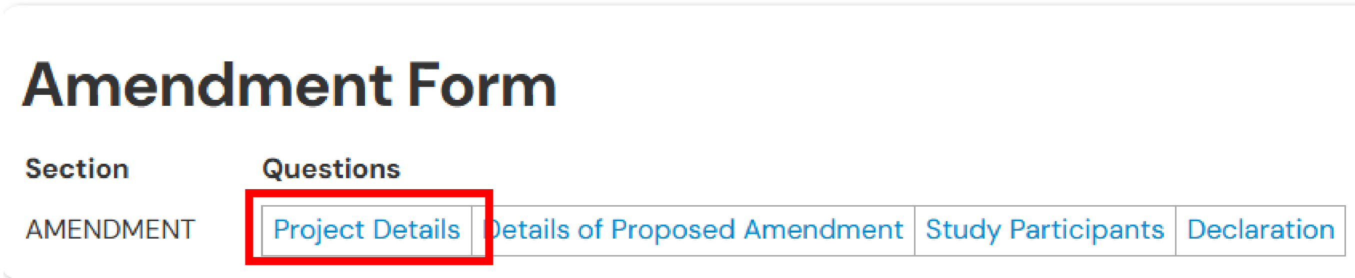


To submit an amendment, an annual ethics approval request, an end-of-project notice, or any other sub form in Infonetica, the procedure is similar to that used for submitting a new research project / clinical trial. Below are the steps specific to sub forms:

1. In the Work Area, click on the name of the project for which you want to submit a review request to the REB.
2. Then click on the ***Create Sub Form*** button in the middle of the page.
3. Select the appropriate sub form in the pop-up window.
   Note: Select ***Other Forms*** if the form you need does not appear among the options displayed.
   The project tree will now display the title of the newly created form under the main form. You can click on the form name in the tree to return to it later.



4. Click the button that opens the first page of questions (see the example in the image below).

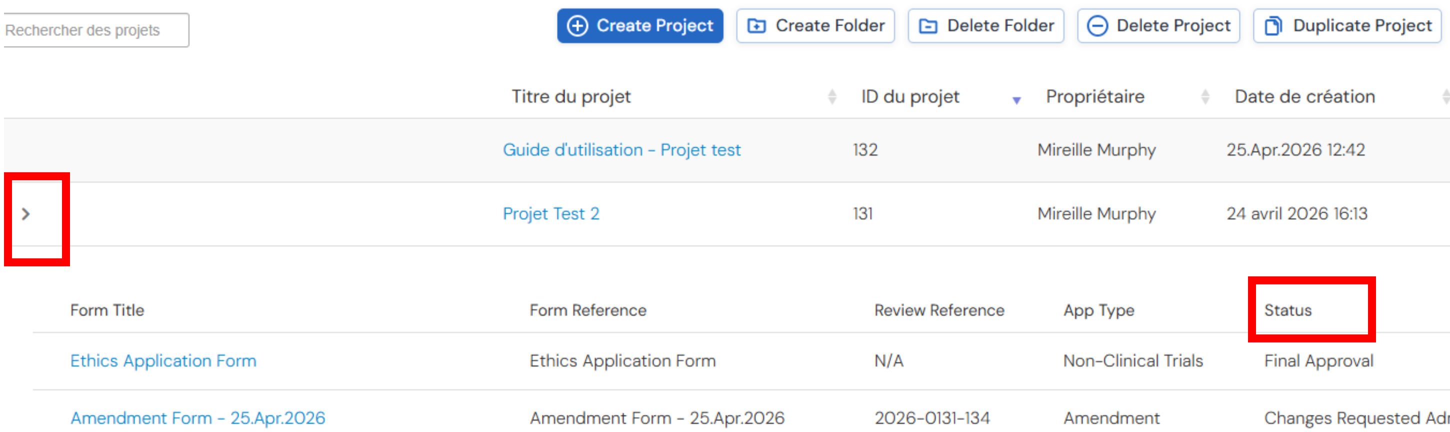


5. Complete the form, making sure to answer all mandatory questions, sign the form or request a signature, then click the ***Submit*** button.
6. For additional details on navigating the forms, refer to the previous section on submitting a new research project to the REB.

Track a request

You can track the progress of your request from the Overview panel displayed on the right side of the home page for each form (or request) submitted to the REB.

The status of your request is also available by clicking at the far left of the research project / clinical trial title in the Work Area. All requests submitted in relation to the research project / clinical trial will appear below it. Their status appears in the ***Status*** column.



If changes are requested or if you receive a conditional approval from the REB:

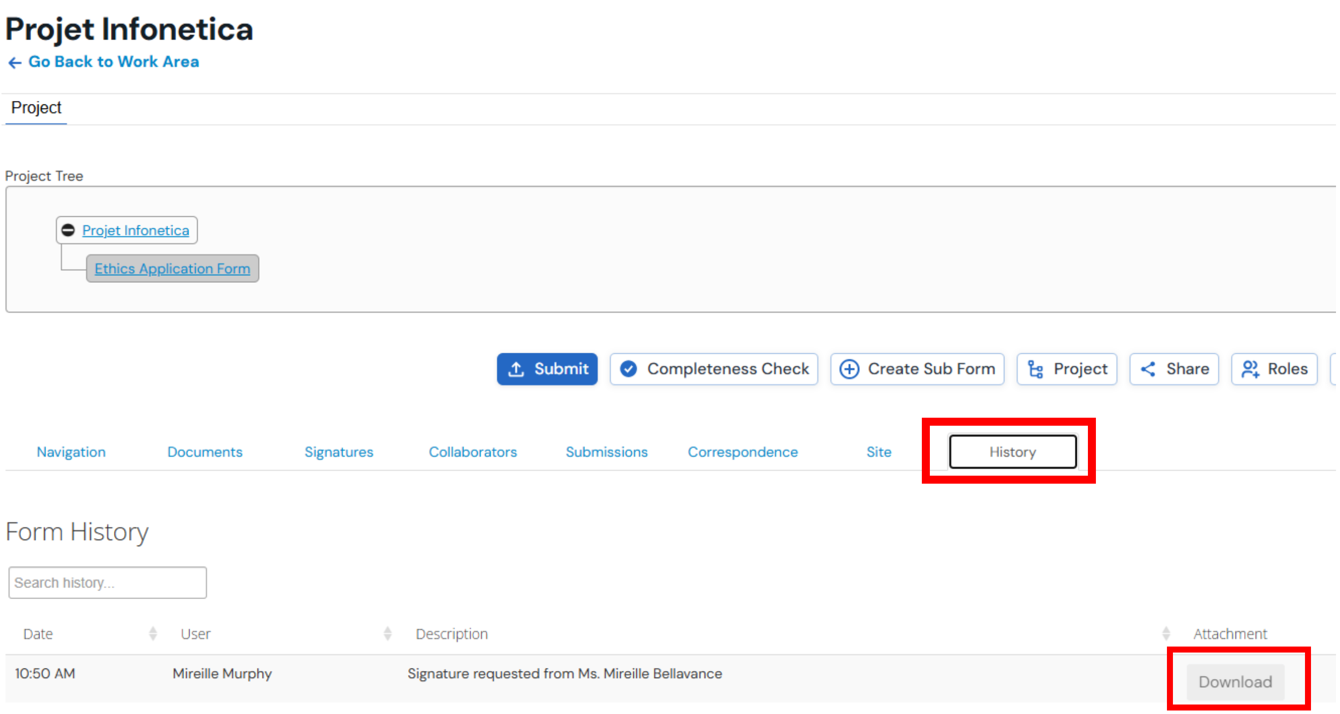
1. You will receive a notification by email and through the ***Notifications*** tile in your Work Area.
2. Make the necessary changes and upload any amended or required documents, if applicable.
3. Sign the completed form.
4. Click the ***Submit*** button.

Approval of your request

Once your request has been approved by the REB, you will receive an approval letter by email.

If you wish to refer to this letter in the future or print a copy for your research project records:

1. Click on the form corresponding to your REB request.
2. Click on the ***History*** tab to view the action history related to your request.
3. On the line corresponding to the your request's final approval by the REB, click the ***Download*** button.



Delete a project

A research project / clinical trial file can only be deleted if the initial ethics review application form has not been submitted to the REB, shared, signed, or if there is no pending signature request. The same restrictions apply when you wish to delete a sub form for an amendment, an annual approval request, or any other type of request.

To delete a research project / clinical trial, click the ***Delete Project*** button, select the appropriate project or trial, and click ***Delete***.

If a project/trial is saved in a specific folder, it must first be moved back to the Work Area before it can be deleted.