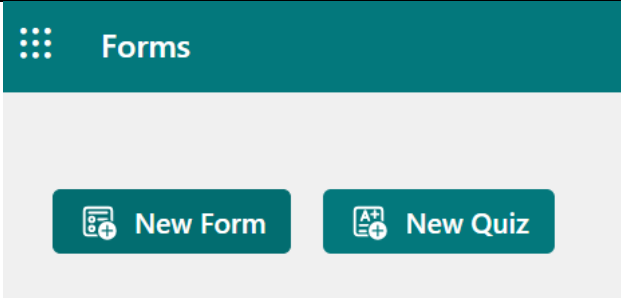
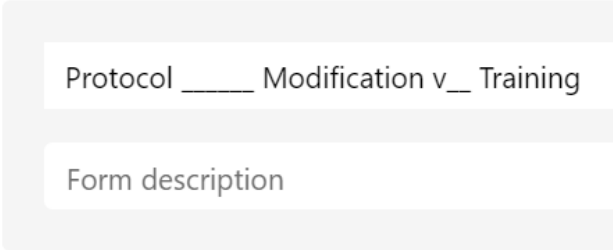




Guidelines for Using Microsoft Forms for Modification Training Documentation

Version 5/7/2024

Create a New Form

1. Login to Microsoft Forms	https://forms.office.com/
2. Select "New Form"	 A screenshot of the Microsoft Forms interface. At the top, there is a teal header with the word 'Forms' and a grid icon. Below the header, there are two buttons: 'New Form' and 'New Quiz'. The 'New Form' button is highlighted with a teal border and contains a form icon.
3. Title the form in the format "Protocol _____ Modification v__ Training" (e.g. Protocol 001004 Modification v7 Training)	<p>View when you click in title box:</p>  A screenshot of the form title box. It shows a text input field with the placeholder text 'Protocol _____ Modification v__ Training' and a 'Form description' label below it. <p>View when you click out of title box:</p> <p>Protocol _____ Modification v__ Training</p>
4. Select "Add New"	<p>Protocol _____ Modification v__ Training</p>  A screenshot of the 'Add new' button, which is a teal button with a plus sign and the text 'Add new'. To its right is a circular icon with a lightning bolt.
5. Select "Choice"	 A screenshot of the form builder's selection bar. It shows a row of buttons: a plus sign, 'Choice' (selected with a teal circle), 'Text' (with a 'T' icon), 'Rating' (with a thumbs up icon), 'Date' (with a calendar icon), and a dropdown arrow. To the right of this row is a circular icon with a lightning bolt.

6. In the "Question" field, type the following:
 By clicking "yes" below, I certify that I attended a meeting and/or received updates and reviewed changes regarding Protocol _____ Modification v__ and that I will direct any questions to the PI.

(Note: You can modify the statement as needed for minor modifications or modifications that involve the consent document only. The above language is the minimum required language for a major modification. **However, you must keep the question to 200 characters or less. If you exceed 200 characters, the question will be cut off in the Excel spreadsheet. This is important, as the Microsoft Form generates a document that will ultimately be saved in the Regulatory File – see "Save Responses" step 7.)**

1. Question

Option 1

Option 2

+ Add option Add "Other" option

Multiple answers Required ...

1. By clicking "yes" below, I certify that I attended a meeting and/or received updates and reviewed changes regarding Protocol ____ Modification v__ and that I will direct any questions to the PI.

Option 1

Option 2

+ Add option Add "Other" option

Multiple answers Required ...

7. In the "Option 1" field, type: "yes" and select "Required" in the bottom right-hand corner

1. By clicking "yes" below, I certify that I received updates and reviewed changes regarding the above titled protocol modification and that I will direct any questions to the PI.

Yes

Option 2

No

+ Add option Add "Other" option

Multiple answers Required ...

8. Delete the line for “Option 2” by hovering next to the end of the line and clicking the trash can

1. By clicking “yes” below, I certify that I received updates and reviewed changes regarding the above titled protocol modification and that I will direct any questions to the PI.

No

Yes Delete

⋮ Option 2 Delete

+ Add option Add “Other” option

Multiple answers Required ⋮

Collect Responses

1. Select the three dots in the upper right-hand corner and click on “Settings”

Preview Style **Collect responses** Present ⋮

Collect responses Present ⋮

- Collaborate or Duplicate
- Settings**
- Multilingual
- Print Form
- Terms

2. Select the following settings

Settings

Who can fill out this form

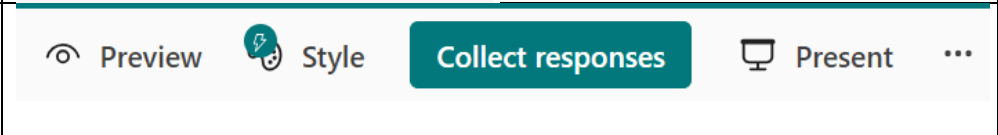
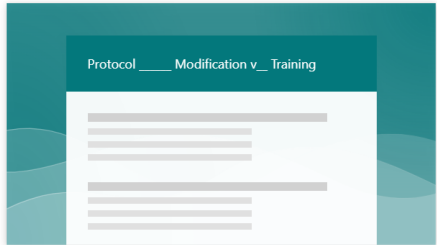
Anyone can respond

Only people in National Institutes of Health can respond
Sign-in required to validate access within National Institutes of Health

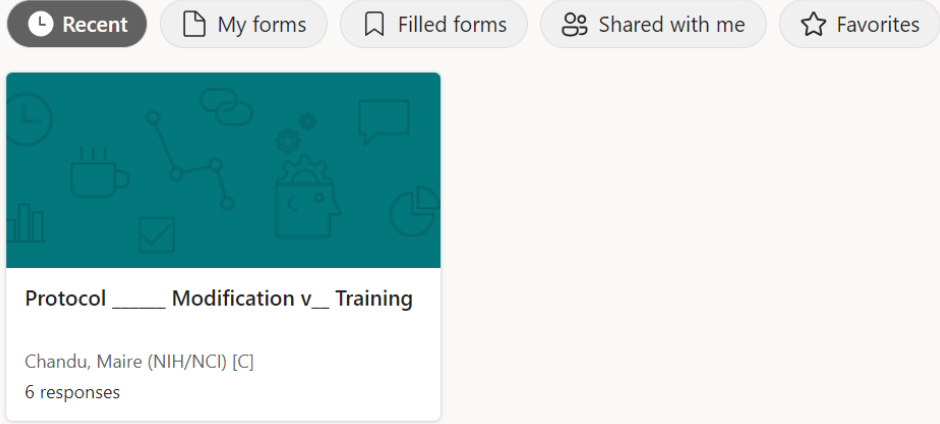
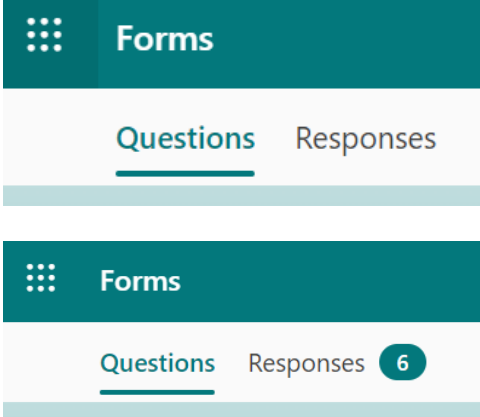
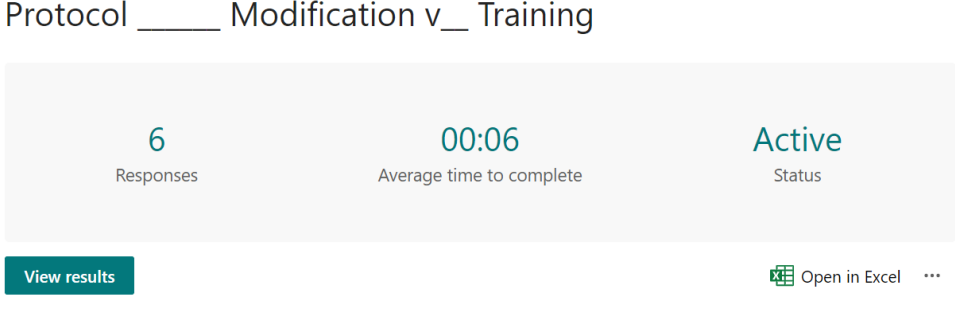
Record name

One response per person

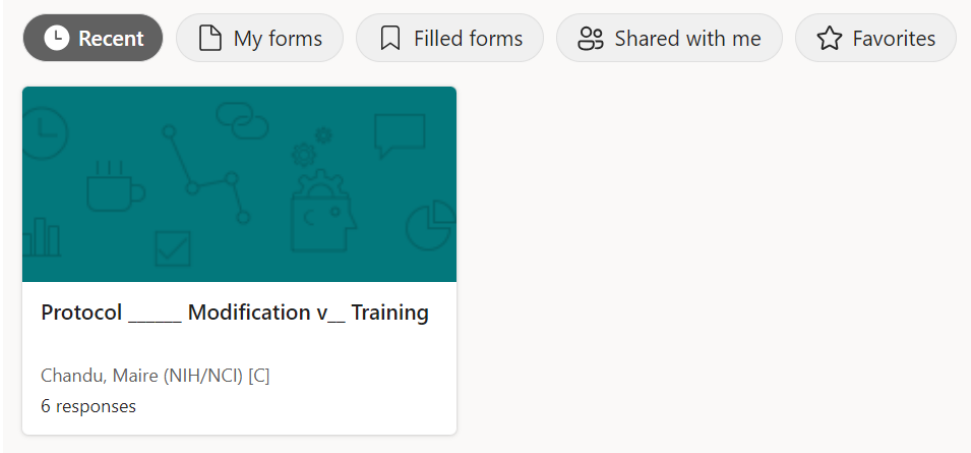
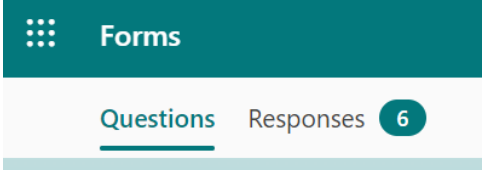
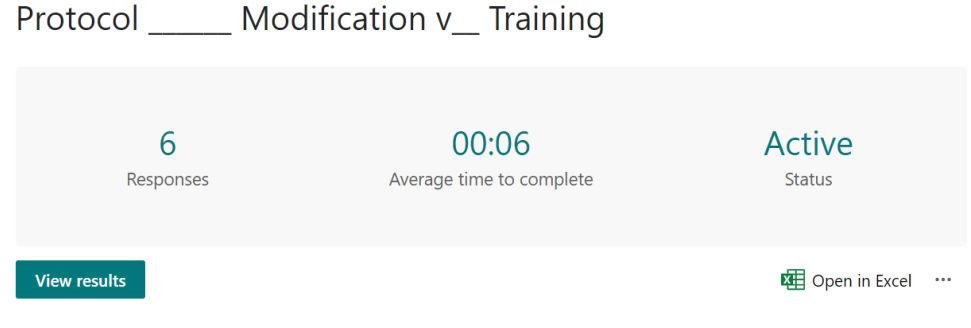
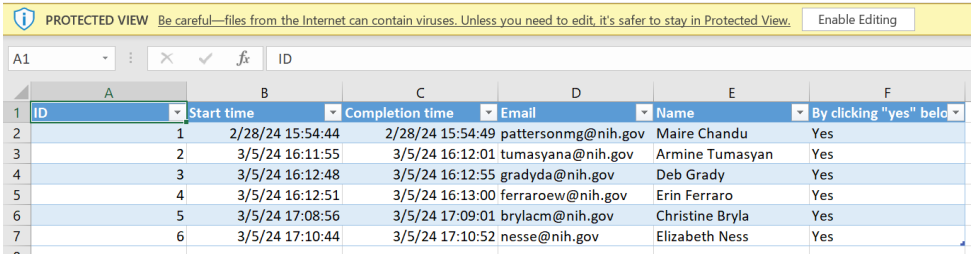
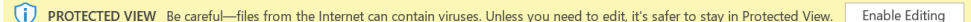
Specific people in National Institutes of Health can respond

	<p>Options for responses</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Accept responses <input type="checkbox"/> Start date <input type="checkbox"/> End date <input type="checkbox"/> Set time duration ⓘ <input type="checkbox"/> Shuffle questions <input checked="" type="checkbox"/> Disable question number for respondents <input type="checkbox"/> Show progress bar ⓘ <input checked="" type="checkbox"/> Hide Submit another response <input type="checkbox"/> Customize thank you message <input type="checkbox"/> Allow respondents to save their responses
<p>3. Select "Collect Responses"</p>	
<p>4. Select "Copy Link" (Note: You can also select "Shorten URL" if you would like)</p>	<p>Send and collect responses</p> <ul style="list-style-type: none"> <input type="radio"/> Anyone can respond <input checked="" type="radio"/> Only people in National Institutes of Health can respond Sign-in required to validate access within National Institutes of Health <input checked="" type="checkbox"/> Record name <input checked="" type="checkbox"/> One response per person <input type="radio"/> Specific people in National Institutes of Health can respond <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>https://forms.office.com/g/Qh5V0y9hgA Copy link</p> <p><input checked="" type="checkbox"/> Shorten URL</p>  <p>Responders will see the form like this.</p> </div>
<p>5. Paste the link into an email with a message to your study team</p> <p>(Note: When respondents complete the survey, the system will automatically recognize and record his/her name and NIH email address)</p>	<p>Example Email:</p> <div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <p>Send To _____</p> <p>Cc _____</p> <p>Bcc _____</p> <p>Subject Protocol ____ Modification v_ Training</p> </div> <p>Good afternoon,</p> <p>Protocol ____ Modification v_ had been approved. Please review the attached documents and complete a training attestation by clicking the link below:</p> <p>https://forms.office.com/g/Qh5V0y9hgA</p>

Track Responses

<p>1. Login to Microsoft Forms</p>	<p>https://forms.office.com/</p>
<p>2. Select the appropriate form from “Recent” or “My forms”</p>	
<p>3. Track responses by clicking “Responses” (Note: When new responses are available, you will see a number next to “Responses”)</p>	
<p>4. Select “View results” or “Open in Excel” to track responses Note: Microsoft forms does not know how many people are sent the link via email – you will need to track manually who completed the training.</p>	

Save Responses

1. Login to Microsoft Forms	https://forms.office.com/																																										
2. Select the appropriate form from “Recent” or “My forms”																																											
3. Select “Responses”																																											
4. Once all responses have been collected, select “Open in Excel” to download a copy of the responses																																											
5. Open the downloaded file	<p>You will see the following information on the Excel spreadsheet for each respondent:</p>  <table border="1"> <thead> <tr> <th>ID</th> <th>Start time</th> <th>Completion time</th> <th>Email</th> <th>Name</th> <th>By clicking "yes" below</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>2/28/24 15:54:44</td> <td>2/28/24 15:54:49</td> <td>pattersonmg@nih.gov</td> <td>Maire Chandu</td> <td>Yes</td> </tr> <tr> <td>2</td> <td>3/5/24 16:11:55</td> <td>3/5/24 16:12:01</td> <td>tumasyana@nih.gov</td> <td>Armine Tumasyan</td> <td>Yes</td> </tr> <tr> <td>3</td> <td>3/5/24 16:12:48</td> <td>3/5/24 16:12:55</td> <td>gradyda@nih.gov</td> <td>Deb Grady</td> <td>Yes</td> </tr> <tr> <td>4</td> <td>3/5/24 16:12:51</td> <td>3/5/24 16:13:00</td> <td>ferraroew@nih.gov</td> <td>Erin Ferraro</td> <td>Yes</td> </tr> <tr> <td>5</td> <td>3/5/24 17:08:56</td> <td>3/5/24 17:09:01</td> <td>brylacm@nih.gov</td> <td>Christine Bryla</td> <td>Yes</td> </tr> <tr> <td>6</td> <td>3/5/24 17:10:44</td> <td>3/5/24 17:10:52</td> <td>nesse@nih.gov</td> <td>Elizabeth Ness</td> <td>Yes</td> </tr> </tbody> </table>	ID	Start time	Completion time	Email	Name	By clicking "yes" below	1	2/28/24 15:54:44	2/28/24 15:54:49	pattersonmg@nih.gov	Maire Chandu	Yes	2	3/5/24 16:11:55	3/5/24 16:12:01	tumasyana@nih.gov	Armine Tumasyan	Yes	3	3/5/24 16:12:48	3/5/24 16:12:55	gradyda@nih.gov	Deb Grady	Yes	4	3/5/24 16:12:51	3/5/24 16:13:00	ferraroew@nih.gov	Erin Ferraro	Yes	5	3/5/24 17:08:56	3/5/24 17:09:01	brylacm@nih.gov	Christine Bryla	Yes	6	3/5/24 17:10:44	3/5/24 17:10:52	nesse@nih.gov	Elizabeth Ness	Yes
ID	Start time	Completion time	Email	Name	By clicking "yes" below																																						
1	2/28/24 15:54:44	2/28/24 15:54:49	pattersonmg@nih.gov	Maire Chandu	Yes																																						
2	3/5/24 16:11:55	3/5/24 16:12:01	tumasyana@nih.gov	Armine Tumasyan	Yes																																						
3	3/5/24 16:12:48	3/5/24 16:12:55	gradyda@nih.gov	Deb Grady	Yes																																						
4	3/5/24 16:12:51	3/5/24 16:13:00	ferraroew@nih.gov	Erin Ferraro	Yes																																						
5	3/5/24 17:08:56	3/5/24 17:09:01	brylacm@nih.gov	Christine Bryla	Yes																																						
6	3/5/24 17:10:44	3/5/24 17:10:52	nesse@nih.gov	Elizabeth Ness	Yes																																						
6. Click “Enable Editing”																																											

7. Expand the cell with the survey attestation question so that the entire question is visible (expand cell manually and using “wrap text” function)

(Note: It is key that the entire question is visible as this document will be saved in the Regulatory File.)

F

By clicking "yes" below

Yes

Yes

Yes

Yes

Yes

Yes

ata Review View Automate

ab cc

General

\$ %

←.00 →.00

Number

Wrap Text

Wrap extra-long text into multiple lines so you can see all of it.

[Tell me more](#)

8,

5/24 16:12:01 tumasvana@nih.gov

F

By clicking "yes" below, I certify that I attended a meeting and/or received updates and reviewed changes regarding Protocol _____ Modification v__ and that I will direct any questions to the PI.

Yes

Yes

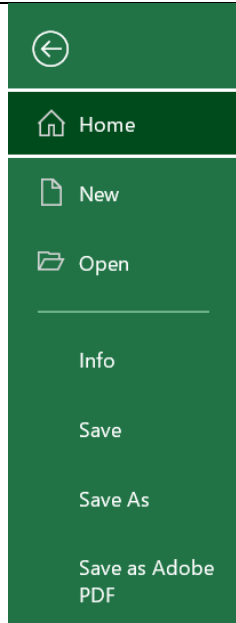
Yes

Yes

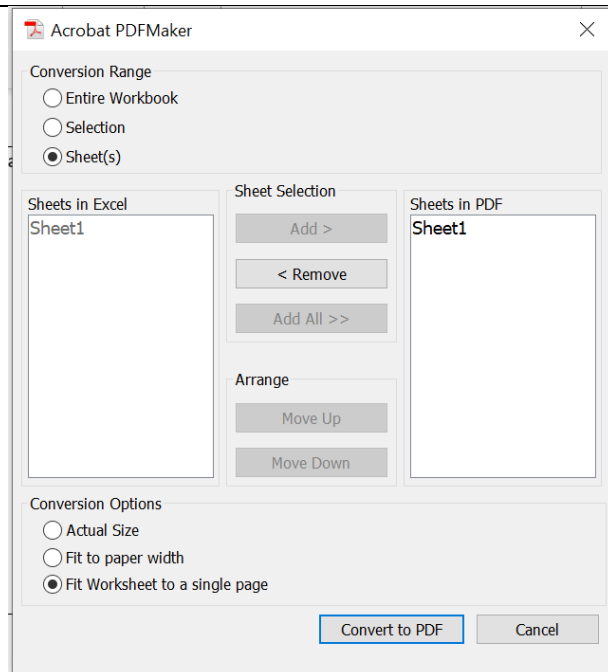
Yes

Yes

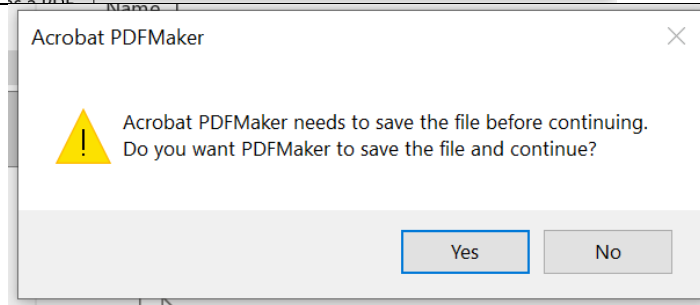
8. Click on File > Save as Adobe PDF



9. Select “Fit Worksheet to a single page” and then click “Convert to PDF”



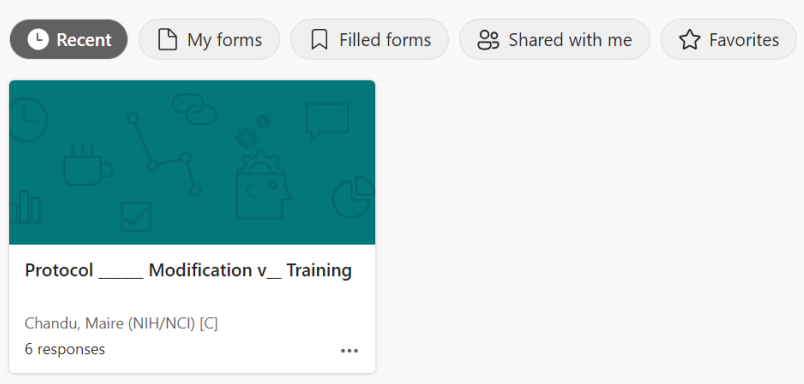
10. If you get this pop up, click “Yes”



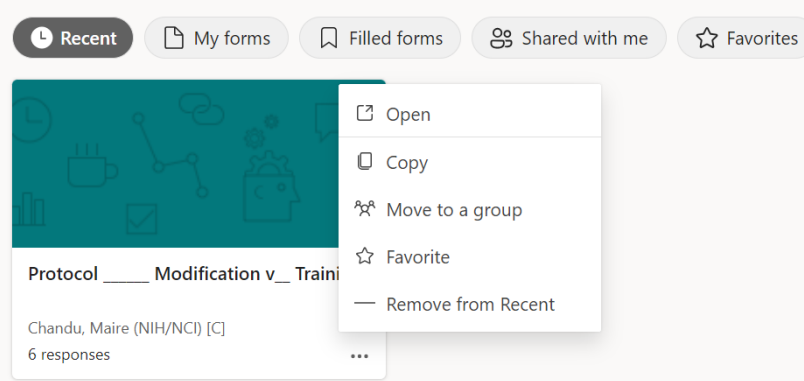
11. Save document in desired location. Once the spreadsheet is saved as a PDF document, it cannot be altered.

Copy Form

On your Microsoft Forms home page, locate the form you want to copy (Note: If it is an older form, you may have to click on “My forms” instead of “Recent”)



Select the three dots in the lower right-hand corner and click on “Copy”



A new copy of the form will appear in your account

