



Instructions: Tracked Changes

What is Tracked Changes?

“Tracked Changes” refers to a method where you show what was removed and/or added to a document.

When should you track changes?

Almost any time that you are editing a document and sending it back to the IRB, track your changes. The IRB will appreciate you.

Usually the email from the IRB will alert you to whether we would prefer changes to be tracked, however. When in doubt, it's easy to ask.

Why are we tracking changes?

- Tracked changes make reviews more efficient. With the changes clearly marked, the reviewer can focus on the relevant portions of the material and more quickly complete your review.
- When modifications are incorporated directly into the protocol, at the end of the process both the IRB and the researcher have one document that we can refer back to as the currently approved version. This is important for keeping everyone on the same page.

How to track changes:

In a “Protected Form”

What forms are “Protected Forms”?

The Human Subjects Application Form, Application Supplements, and the Modification Form.

What does “Protected Form” mean and why are we using it?

A “Protected form” is a type of Word document where security settings are used to create a fillable form. We use this method because it allows for some compatibility across different hardware and software, it is easy to fill answers into the form fields, and the protections ensure that users don't accidentally edit the form.

There are positives and negatives to protected forms. In order to track changes, because Word considers that as editing a form, the protections have to be turned off.

Steps to turn off form protections to use the Tracked Changes function:

1. Click File
2. Click “Protect Document”
3. Select “Restrict Editing”
4. Select “Stop Protection”
5. Enter the numbers “530” and select OK. This will “unprotect” the document.
6. Turned on Tracked Changes.
 - Instructions for turning on Tracked Changes based on your system:
 - Microsoft Word (Windows) [Tracked Changes](#)
 - Microsoft Word (Mac) [Tracked Changes](#)
7. Once the Tracked Changes feature is turned on, you need to enable the protections for the form again so that the form fields will work properly. To turn on protections again, follow the steps above, but in reverse. When you are asked to enter a password at this point, you can leave the password field blank.
8. At this point, as you make your edits you’ll see the changes being tracked.

Please only edit the form when it has the protections turned on.

When the formatting of a form is accidentally (or intentionally) changed, we have to fix it, which takes time away from your review. If edits are made with protections turned off, and the formatting of the form is significantly change, we may return your form and request that the edits are made again with protections turned on.

In a normal Word Document

Turn on the Tracked Changes feature by following the applicable instructions below:

- Microsoft Word (Windows) [Tracked Changes](#)
- Microsoft Word (Mac) [Tracked Changes](#)

In a PDF

If you do not have access to Microsoft Word, or you are editing a document that does not allow tracking of changes, such as a PDF, then you can indicate the changes using another method, such as using a highlighting tool.

If you use this method, send the IRB two copies of the document – one showing the tracked changes and one final version.

How to Manage Tracked Changes Depending on Your Application Stage:

When Editing Forms and Materials during the Screening Process

The goal, at the end of the screening process, is to have a document that shows all of the changes made over the course of the screening.

If you are returning to a document for another round of screening to make more edits, meaning the application already has changes tracked, leave the prior tracked changes.

When Editing Forms and Materials for a Modification

When editing the application form or materials for a modification, the document may have changes tracked from screening during the initial approval process or a previous modification. When make new changes through a modification, be sure to “Accept All Changes” in the document first. The submitted document should only show the latest changes that have been made. If the document has old tracked edits that have yet to be “Accepted”, this will confuse the review as to what is a new change versus an old one.

Tips for Tracking Changes (when using Word):

1. Once the setting “Tracked Changes” is turned on you can just make changes like you normally would
2. The setting “All Markup” allows you to see the tracking as it is happening.
3. The setting “No Markup” allows you to see the final document without the tracking.
4. If you are working with Tracked Changes a lot, it may be worthwhile to create a keyboard short to show/hide the changes. [Here is an example article on how to do this.](#)