

Phoenix Applicant Guidance

GUIDANCE FOR USING THE ONLINE RESEARCH ETHICS
APPLICATION SYSTEM
RESEARCH ETHICS & INTEGRITY / GOVERNANCE & COMPLIANCE
DIRECTORATE

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HOW TO START

The “Applicant” side. This has its own URL (<https://researchethics.leeds.ac.uk/>) and is where researchers can create applications, share them with colleagues and submit them for review. This guide only covers the Applicant side of the system.

The “Review” side. This part of the system has a different URL and is only used by administrators and reviewers. This is where applications are reviewed and approved as appropriate. If you are accidentally given the URL for this side, you will be advised by the system that you do not have “permission to access”.

To log into Phoenix Research Ethics Application System, please go to the link [Phoenix](#) or <https://researchethics.leeds.ac.uk/>

For further information regarding research ethics, please go to the [Research Ethics webpages](#).

IT suggest you use the latest version of the following browsers:

- Chrome
- Firefox
- Safari (for Apple Mac users)

If you experience problems, try clearing your cache or change browsers. You can also try going ‘incognito’, this will save you clearing your cache. If this does not resolve the issue or for other queries, please let us know by emailing the appropriate Faculty Research Ethics Committee (FREC) addresses listed below:

CONTACT INFORMATION

Business, Environment, Social Sciences - BESSResearchEthics@leeds.ac.uk

Arts, Humanities and Cultures - AHCResearchEthics@leeds.ac.uk

Engineering & Physical Sciences - EPSResearchEthics@leeds.ac.uk

Biological Sciences - FBSResearchEthics@leeds.ac.uk

Schools of Medicine and Healthcare - FMHUniEthics@leeds.ac.uk

School of Psychology - psyc-ethicssubmissions@leeds.ac.uk

PLEASE NOTE: all hyperlinks in the Phoenix application form were correct at the time of publishing. All broken hyperlinks will be fixed or removed at the next republishing of the application form.

FOR STUDENTS: LOCATING NAMES

If you are unable to locate your Academic Supervisor's name in the 'search user' box, please ask them to log in to [Phoenix](#). As soon as they have done this, you will be able to locate their name in the 'search user' box.

If a University of Leeds research team member cannot be found in the system when you attempt to add them to your application, please request that they log in to [Phoenix](#). After they have logged in, their name will appear in the 'search user' field.

FOR STAFF: LOCATING NAMES

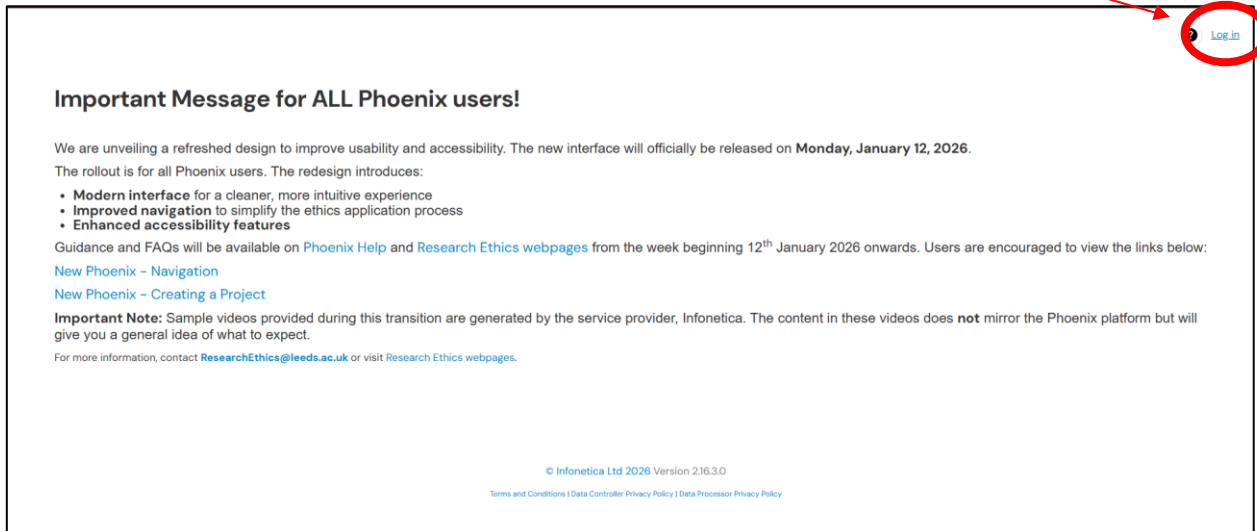
If a University of Leeds research team member cannot be found in the system when you attempt to add them to your application, please request that they log in to [Phoenix](#). After they have logged in, their name will appear in the 'search user' field.

The URL for Phoenix is also available from the [Research Ethics](#) webpages.

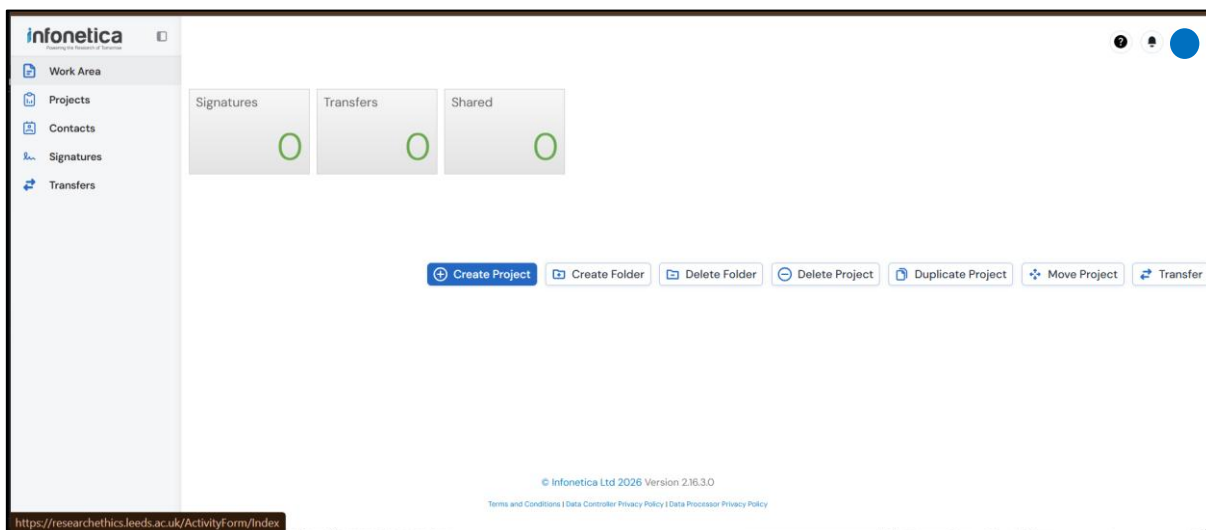
LOGGING INTO PHOENIX THROUGH THE SPLASH PAGE

There may be times the Research Ethics & Integrity Admin team have a splash page activated to tell you important information.

Please press the log in situated in the top right-hand corner of your screen

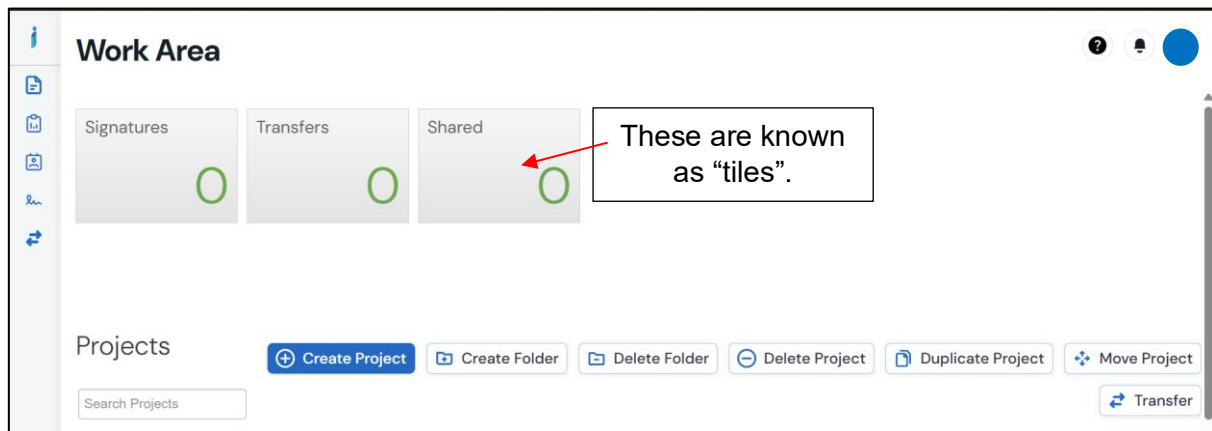


The below screen will appear.



WORK AREA

This home page is known as the 'Work Area'. It contains a number of sections.



Your Work Area provides you with a complete overview of your research ethics applications, present and past.

Notifications – you will receive these throughout the application process. For example, you will be notified your application has been submitted successfully, or your academic supervisor has responded to your request for their signature.

Signatures – (for Academic Supervisors/Module Leaders **ONLY**) if a colleague or a supervisee requests a signature from you, it will land here.

Transfers - This action requires an amendment be applied for before transferring any applications to others not previously mentioned on the original application. You can transfer your application to a colleague or have an application transferred to you, who will then become the owner of the application. Please note, the original owner of the form will lose all control if this action is taken.

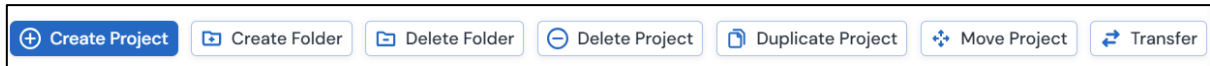
This is used if you need to transfer a project that you own to another Phoenix account. It is not used to transfer a specific form to another applicant, nor to share a form with another applicant. It removes the project from your account, so you no longer have access to it (unless the new owner makes you a collaborator).

This might be used when the person who submitted the form intends to leave or will no longer be connected with the project and therefore needs to transfer the project responsibilities to another collaborator in the research team.

Ownership of the project is transferred including all sub-forms. The new owner can access the project from their Work Area and assign other research members access to the project.

Shared – this tile indicates the number of forms that have been shared with you. It will allow you to view the form or to reject the access provided.

WORK ACTION PANE



Create Project - This is used to create a new project. Enter the project title, select the 'Ethics Application' form, and click on **Create**. This will create a new project and the initial form within the project simultaneously. This project will then appear in the project list on the Work Area.

Create Folder - This is used to create a bespoke folder in which you can store projects. This can be especially useful if you have many projects in your account.

Delete Folder - To delete a folder, select the appropriate folder, and click on **Delete**. If the folder contains projects a warning will advise that the folder cannot be deleted.

Delete Project - This is only possible if the main form has not been submitted, shared, signed, or has outstanding signature requests on it. If there are any sub-forms in the project the same restrictions apply.

Duplicate Project - This is used to duplicate an existing project within your account. The existing project can be duplicated regardless of whether the project has been submitted or not. It is possible to duplicate sub-forms from the original project at the same time.

Move Project - This is used to move a project to a different folder.

Transfers – This action requires an amendment be applied for before transferring any applications to others not previously mentioned on the original application. You can transfer your application to a colleague or have an application transferred to you, who will then become the owner of the application. Please note, the original owner of the form will lose all control if this action is taken.

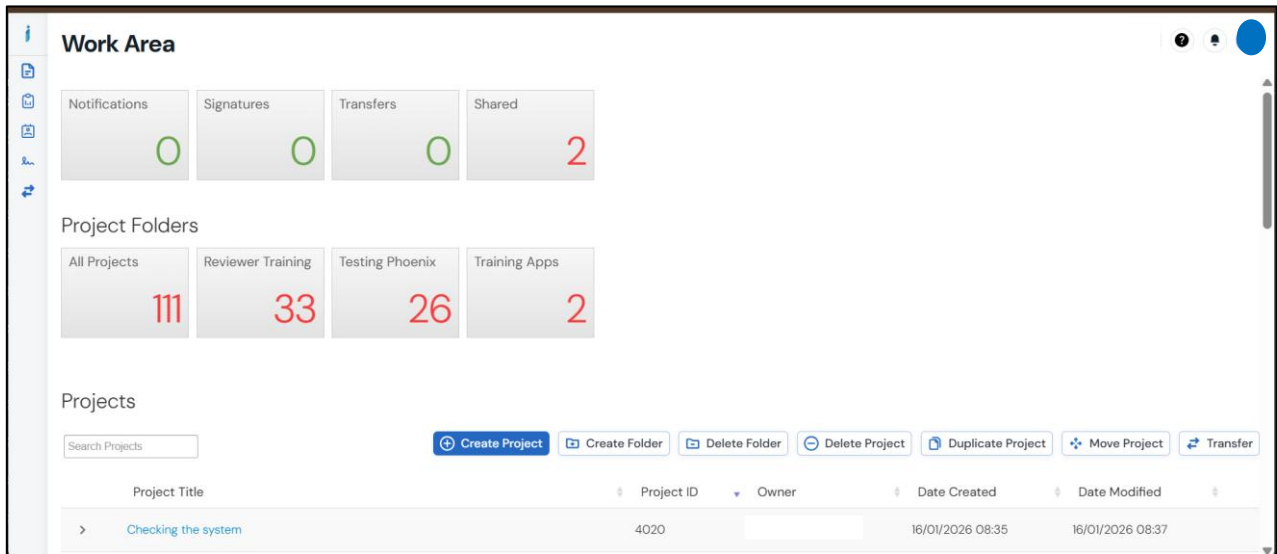
This is used if you need to transfer a project that you own to another Phoenix account. It is not used to transfer a specific form to another applicant, nor to share a form with another applicant. It removes the project from your account, so you no longer have access to it (unless the new owner makes you a collaborator).

This might be used when the person who submitted the form intends to leave or will no longer be connected with the project and therefore needs to transfer the project responsibilities to another collaborator in the research team.

Ownership of the project is transferred including all sub-forms. The new owner can access the project from their Work Area and assign other research members access to the project.

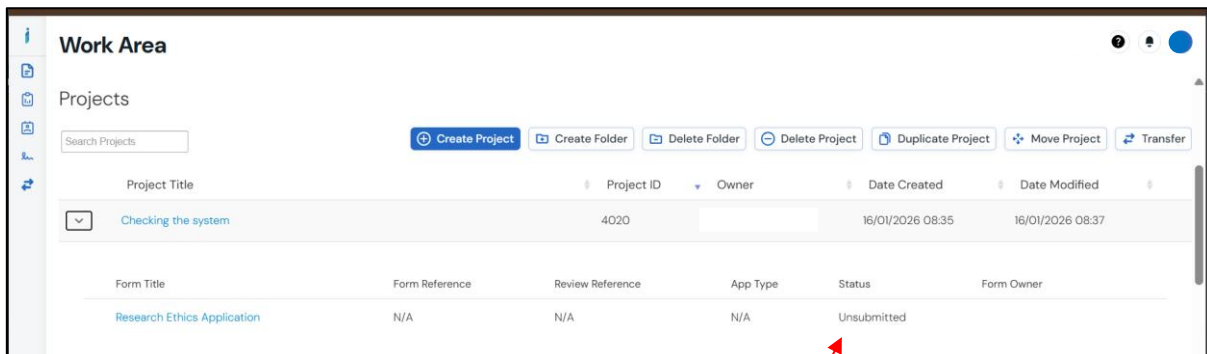
Please note, this action requires an amendment be applied for, before transferring any applications to others not previously mentioned on the original application.

HOME PAGE – YOUR PROJECTS




The list of projects will include details of the project title, the project I.D., the owner of the project, the date created, the date most recently modified and any relevant transfer status.

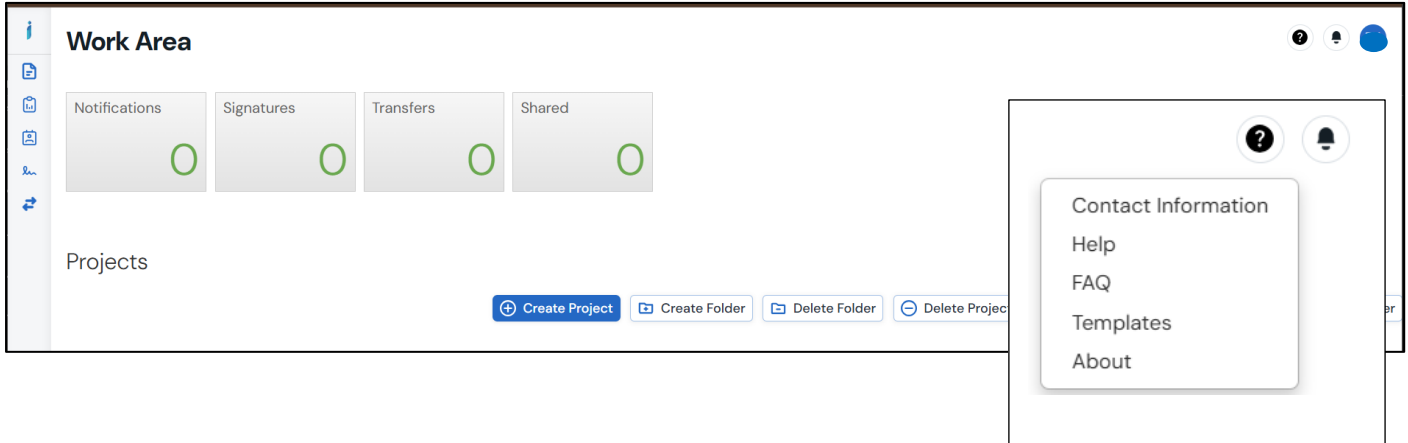
To see details of any form within a project, including sub-forms, click on the arrow beside the project title. This will show the form title, the review reference, the application type, the review status, and the owner of each form.



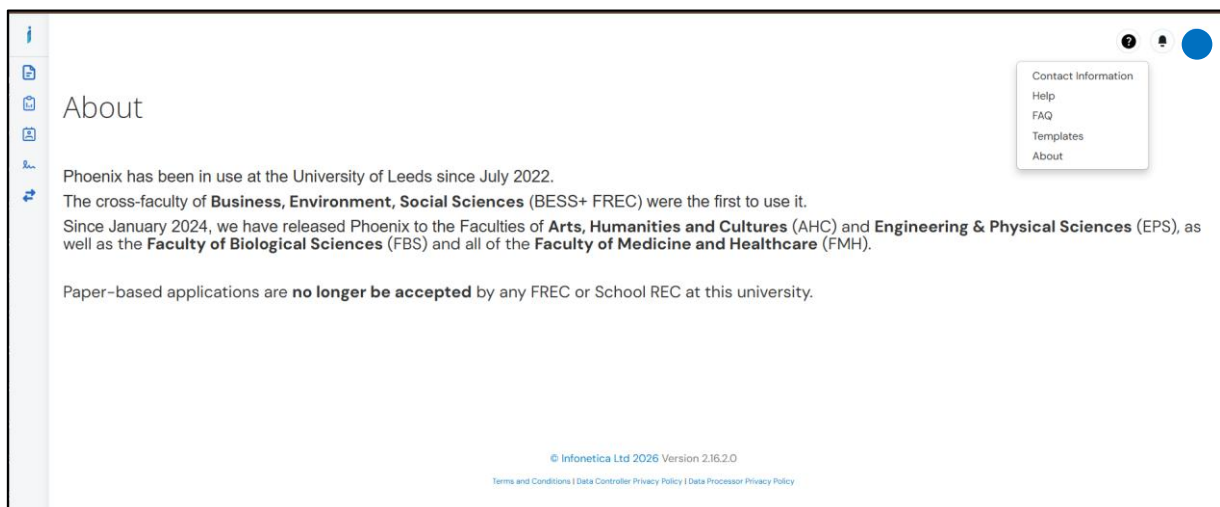
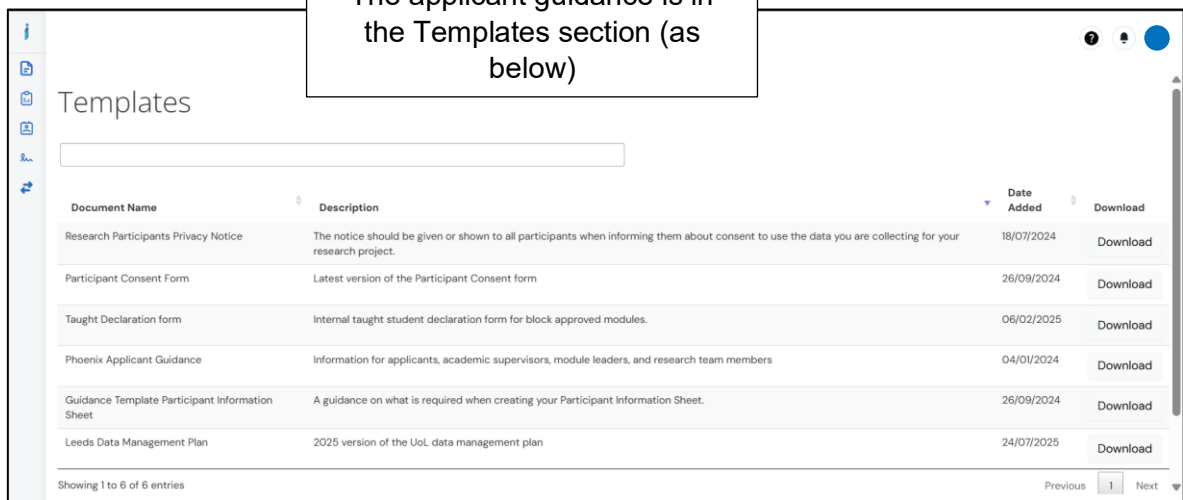
This will always tell you the status of the application

APPLICANT GUIDANCE & FAQs

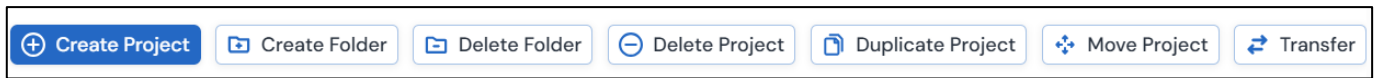
To locate templates (for participant information sheets, consent forms and basic data management plan), applicant guidance and other information, select the  [tab](#).



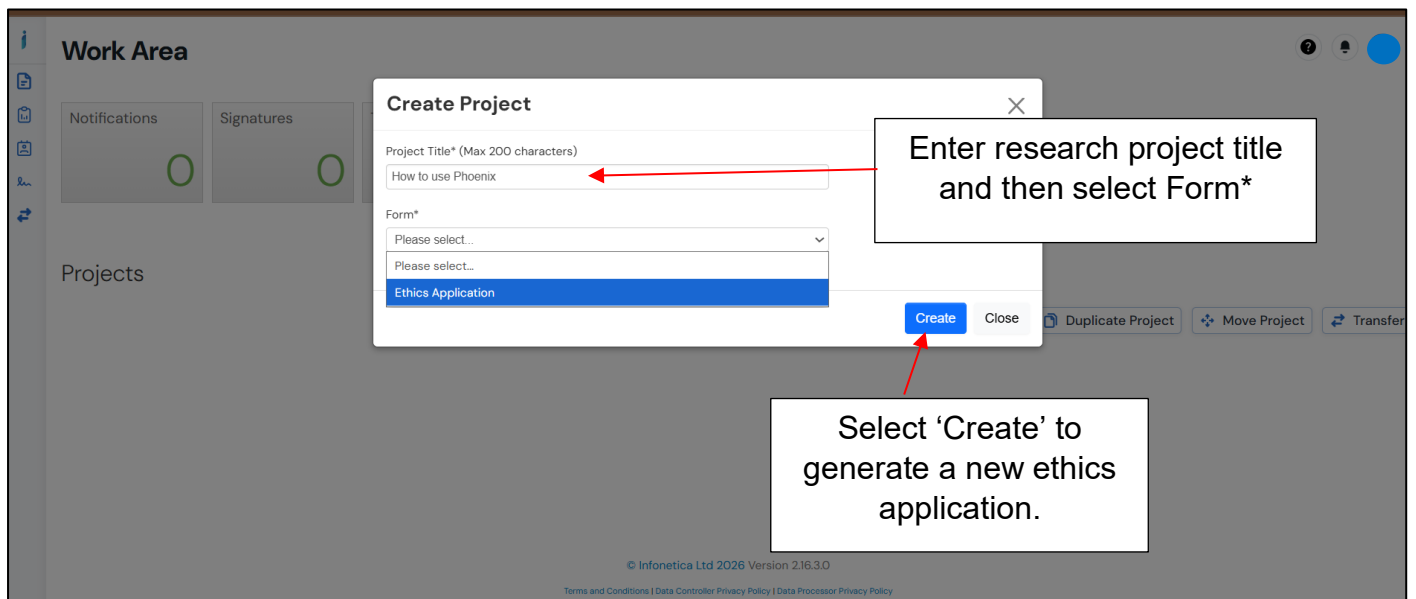
The applicant guidance is in the Templates section (as below)



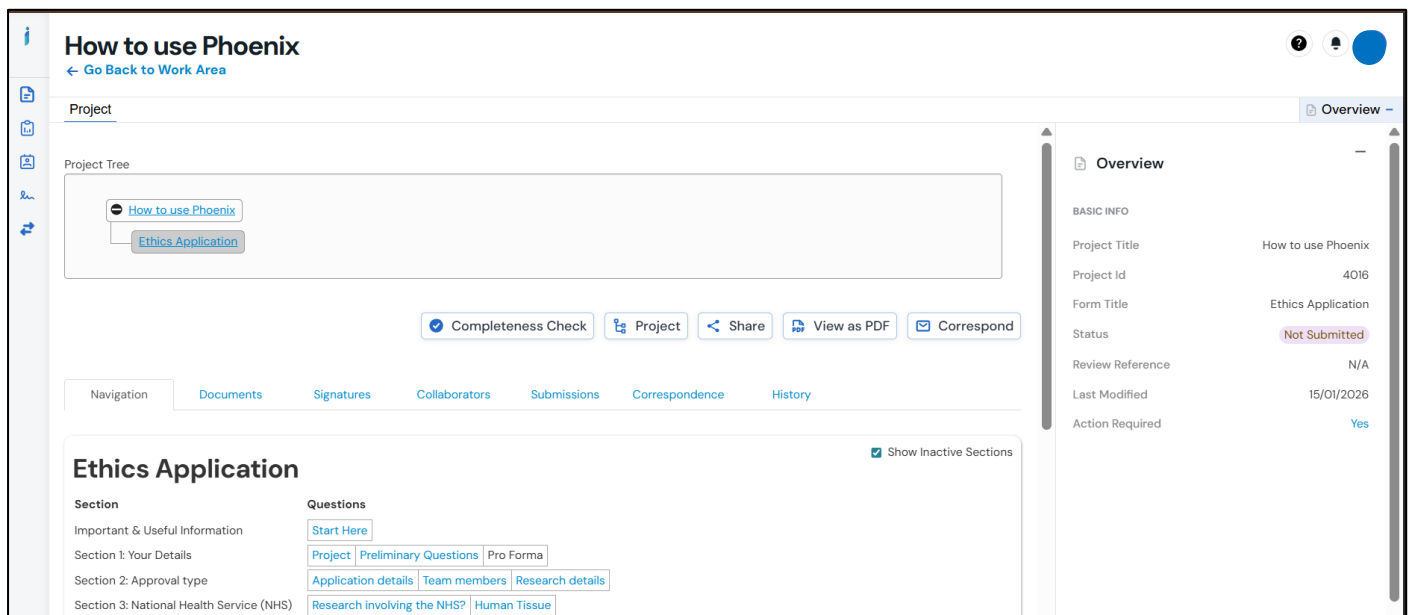
STARTING AN APPLICATION



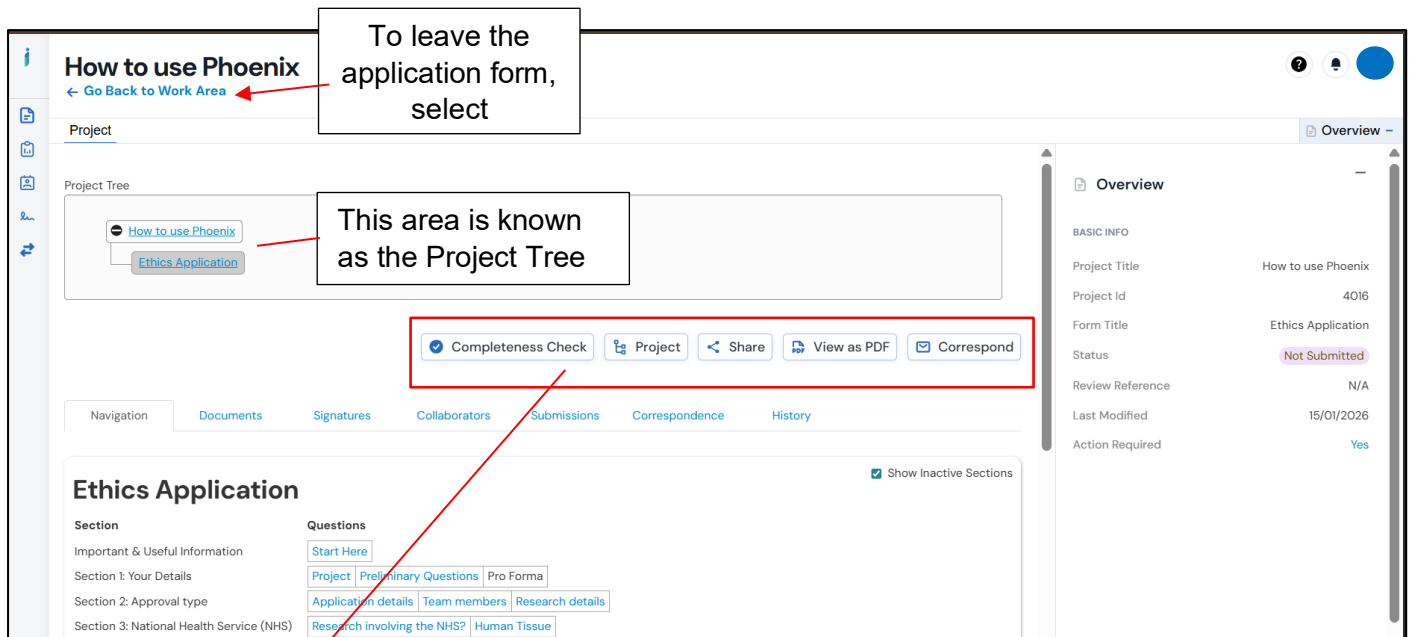
To create a new project, click on 'Create Project' button, enter project title, select 'Ethics Application' and click on 'Create'. This will create a new a project which will then appear in the project list in the Work Area.



The application form will appear as below.

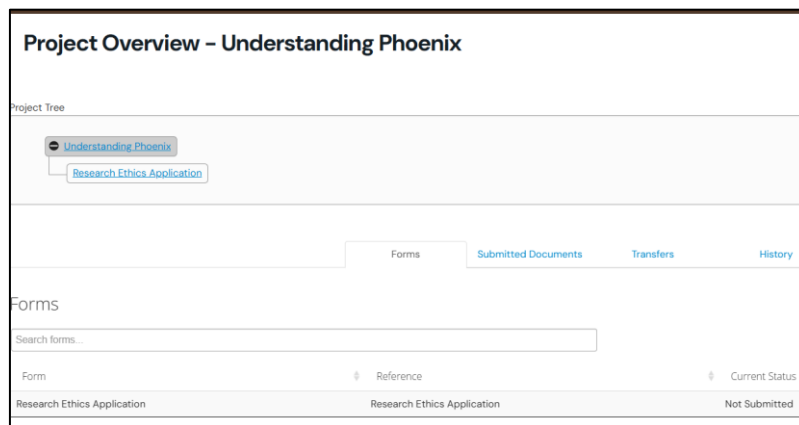


STARTING AN APPLICATION CONT.



Completeness Check – This button allows researchers to identify any mandatory questions within the form that must be completed prior to submission. It may be used at any point during the process.

Project – Selecting the Project button will open the Project and position you at the project's title, as shown below.



Share – You can share the application with fellow collaborators/research team members, as well as your Academic Supervisor.

View as PDF – select to generate a PDF of the form which may be saved or printed.

Correspond – This button enables you to communicate directly with the Research Ethics Admin team only.

INSIDE THE APPLICATION

Questions appear as blue hyperlinks. You can select them to go straight to a specific part of the form. Some questions appear in grey. This means you cannot open them yet. You may need to complete earlier sections first. Sometimes the system hides questions because they do not apply to the type of application you have selected.

The screenshot shows the Phoenix application interface. The main area displays the 'Ethics Application' form with various sections and questions. The 'Overview' panel is open, showing the following information:

BASIC INFO	
Project Title	How to use Phoenix
Project Id	4016
Form Title	Ethics Application
Status	Not Submitted
Review Reference	N/A
Last Modified	15/01/2026
Action Required	Yes

Click on the Overview + to see the following information in a drop-down panel. The information stated here is specific to each application form in your Work Area.

The screenshot shows the 'Overview' panel with the following information:

BASIC INFO	
Project Title	Understanding Phoenix
Project Id	4043
Form Title	Research Ethics Application
Status	Not Submitted
Review Reference	N/A
Last Modified	19/01/2026
Action Required	Yes

Project Title – the title you have created.

Project I.D. – this is the unique identification of the project within Phoenix and is required on supporting documents.

Form Title – identifies the type of application created.

Status – displays the status of your form. Prior to submission it will display 'Not Submitted'. After submission it will display 'Under Review', 'Information Required', 'Information Received', 'Review Complete', 'Favourable' etc.

Review Reference – this displays the complete ethics code and I.D. number.

Action Required – indicates if there are any actions required by the applicant – Yes or No.

When the action required displays 'Yes', the text is blue, (only on un-submitted forms) and the applicant can click it to run a Completeness Check, which will determine the questions not yet answered.

INSIDE THE APPLICATION CONT.

Twelve sections (not including Important & Useful Information) make up the research ethics application form.

The screenshot shows the 'How to use Phoenix' interface. The main area is titled 'Ethics Application' and contains a list of sections on the left and a grid of questions on the right. The 'Overview' sidebar on the right shows project details such as Project Title, Project Id, Form Title, Status, Review Reference, Last Modified, and Action Required.

Section	Questions
Important & Useful Information	Start Here
Section 1: Your Details	Project Preliminary Questions Pro Forma
Section 2: Approval type	Application details Team members Research details
Section 3: National Health Service (NHS)	Research involving the NHS? Human Tissue
Section 4: Time Frame	Project duration
Section 5: The Research	Purpose of Research Description Overview & Methodology Environment Impact Taught Module 1 Taught Module 2 1 2 3 4 5 6
Section 6: Participant Recruitment & Informed Consent	Participants Recruitment FMH only Approach FMH only Informed Consent
Section 7: Research Data	Processing Data Storing the Data Sharing the Research Data Data Collection
Section 8: Trusted Research/External Collaboration	International Collaboration Risks
Section 9: Supporting Documents	Supporting Documents Support Docs 2 Support Docs 3 Support Docs 4
Section 10: University of Leeds Policy & Protocol Compliance	University Research Ethics Policy University Protocols
Section 11: Conflicts of Interest	Addressing potential conflicts of interest
Section 12: Declarations & Signatures	Declarations Signatures

Close the 'Overview' down for better screen access to the form

The screenshot shows the 'Applying for Research Ethics' interface. The main area is titled 'Applying for Research Ethics' and contains a list of sections on the left and a form on the right. The 'Overview' sidebar on the right is closed. Annotations highlight 'Section 2, Outline' and '2.8 Research Project Outline' in the left sidebar, and a speech bubble icon in the top right corner of the form area.

Each section and question are numbered

Section 2, Outline

2.8 Research Project Outline

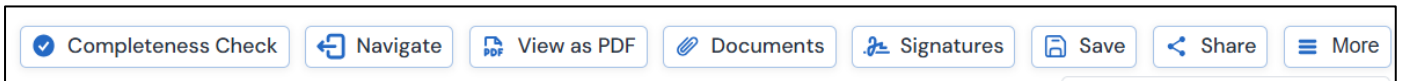
Please describe briefly what your project is about using language easily understood by a lay person. (This is limited to 500 characters)

Every question has a speech bubble

Each question has its own number. If you are in Section 1, the questions will begin with a 1. If you are in Section 2, the questions will all begin with a 2 and so on.

The speech bubble will have a number in it if either a Reviewer or your Supervisor/Research Team Member has made a comment. You can click on it to see the comment.

INSIDE THE APPLICATION CONT.



Navigate – this tab returns you to the project front page.

Documents – this displays documents that have been uploaded into the current submission of the selected form. The details displayed indicate the document type, document name, file name, version date and number.

Signatures –this displays a chronological list of signature requests for the project. The details displayed include projects signed by the academic supervisor, signature requests, and if requests have been validated or require further action (displayed as 'invalid').

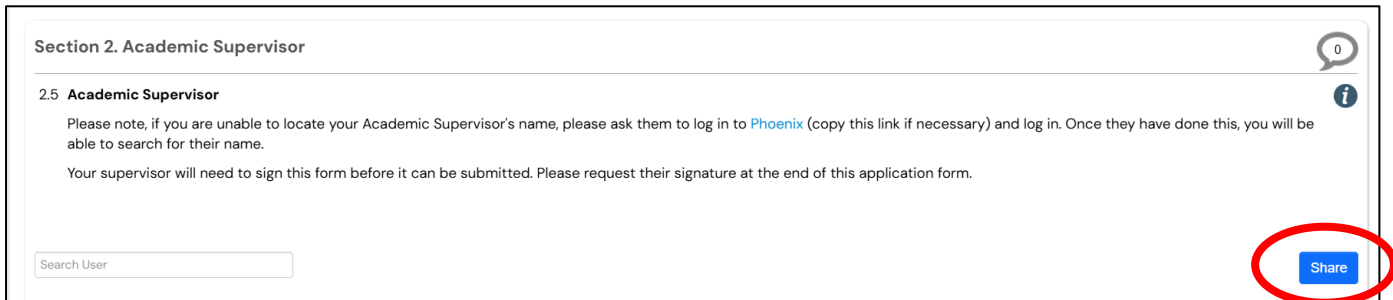
Save – select this to regularly save your work on the form.

View as PDF – select to generate a PDF of the form which may be saved or printed.

ADDING YOUR ACADEMIC SUPERVISOR

If you are unable to locate your Academic Supervisor's name in the 'search user' box, please ask them to log in to [Phoenix](#).

As soon as they have done this, you will be able to locate their name in the 'search user' box.



Section 2. Academic Supervisor

2.5 Academic Supervisor

Please note, if you are unable to locate your Academic Supervisor's name, please ask them to log in to [Phoenix](#) (copy this link if necessary) and log in. Once they have done this, you will be able to search for their name.

Your supervisor will need to sign this form before it can be submitted. Please request their signature at the end of this application form.

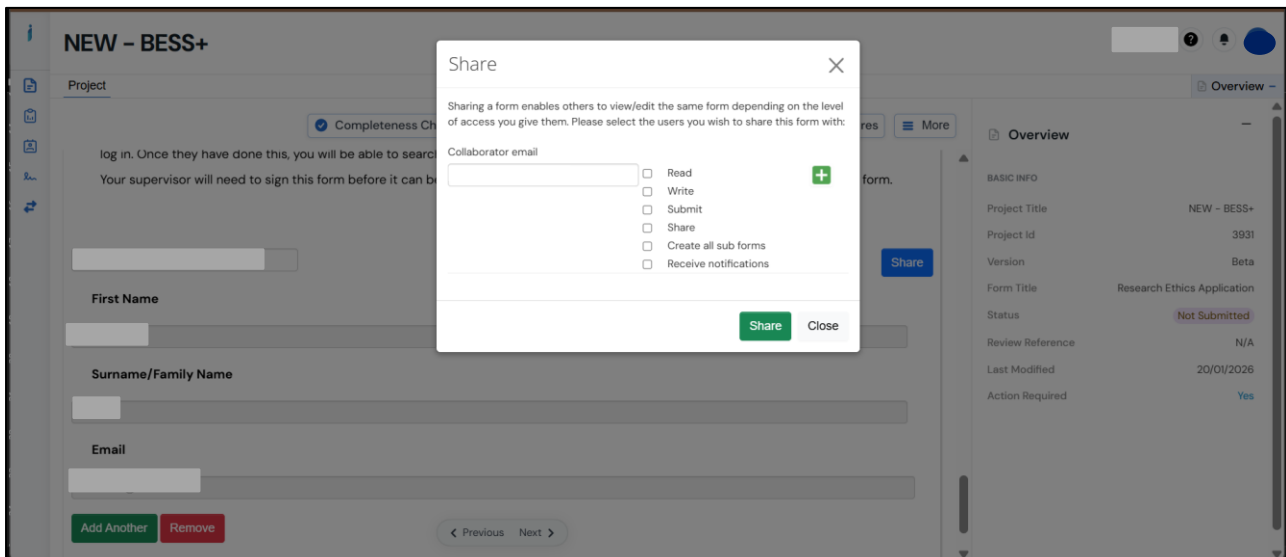
Search User

Share

Press the blue 'Share' button.

SHARING YOUR APPLICATION WITH YOUR ACADEMIC SUPERVISOR

Tick as many of the permissions as you require, this gives your Supervisor access to your application form. There is no limit of permissions, you can give all six, or only one.



NEW - BESS+

Project

Completeness Ch

log in. Once they have done this, you will be able to search

Your supervisor will need to sign this form before it can b

First Name

Surname/Family Name

Email

Add Another Remove

< Previous Next >

Share

Share

Close

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

Read

Write

Submit

Share

Create all sub forms

Receive notifications

Overview

BASIC INFO

Project Title NEW - BESS+

Project Id 3931

Version Beta

Form Title Research Ethics Application

Status Not Submitted

Review Reference N/A

Last Modified 20/O1/2026

Action Required Yes

GIVING PERMISSIONS TO YOUR SUPERVISOR

Share

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

Write

Submit

Share

Create all sub forms

Receive notifications

Share Close

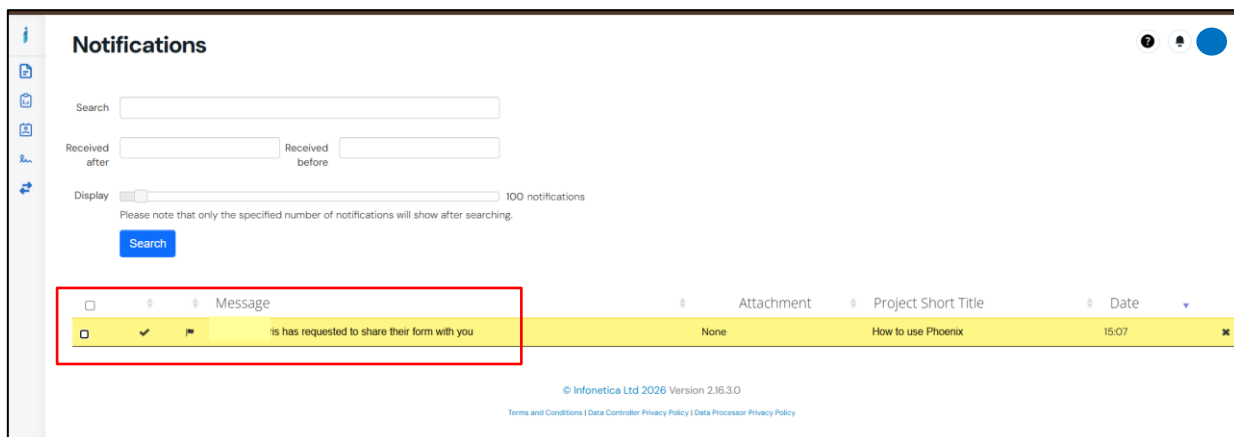
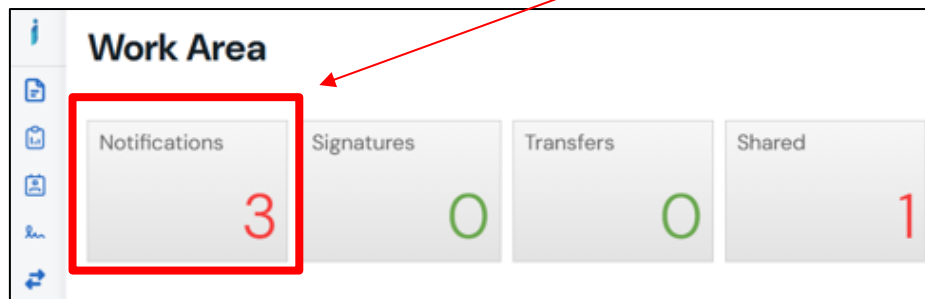
Add name

Add another

Tick appropriate permissions

To add another Supervisor, press the green + sign and add their name to the 'Search User' box. Only the first Supervisor in your list can sign your application form.

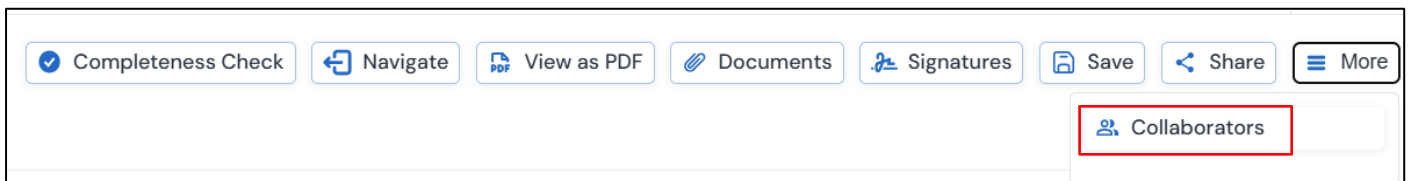
After you have given your Supervisor 'permissions', please let them know you have shared your application with them. Phoenix will only list your 'sharing' in their 'Notifications' within Phoenix itself.



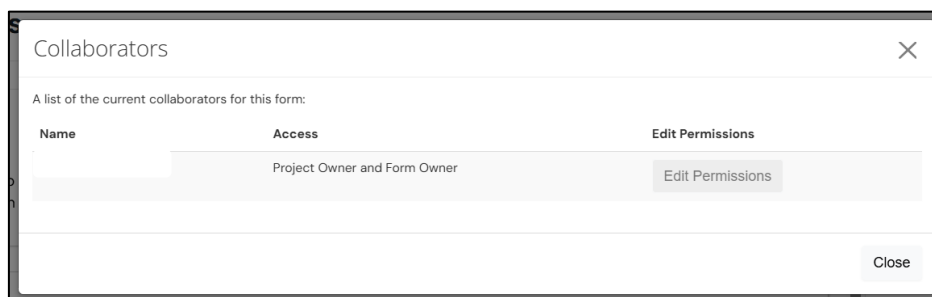
ADDING RESEARCH TEAM MEMBERS (THIS SHOULD ALSO INCLUDE RESEARCH ASSISTANTS)

If you have other research team members (with the University of Leeds only) and you are unable to locate their names when adding them to your application, please ask them to log in to [Phoenix](#). As soon as they have done this, you will be able to locate their name in the 'search user' box.

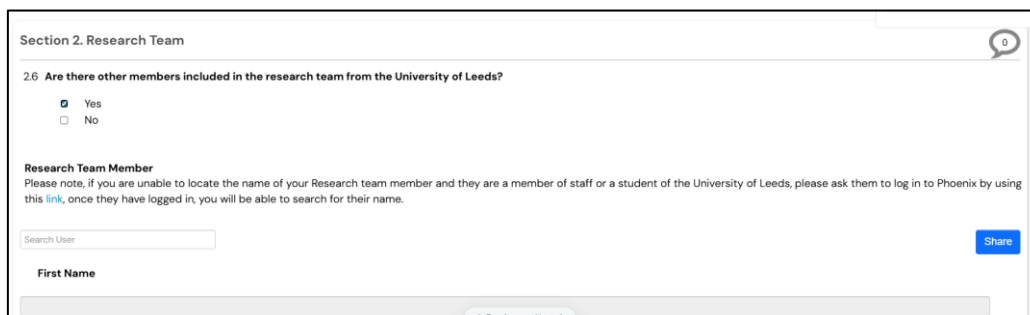
The URL for Phoenix is also available from the [Research Ethics](#) webpages.



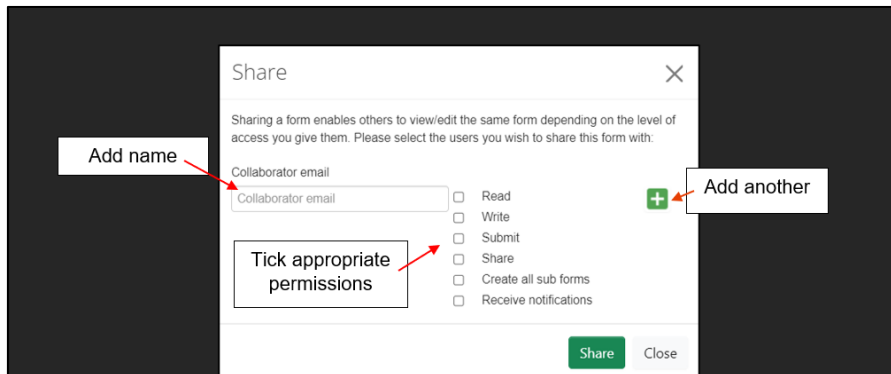
If you select 'Collaborators' before you have added them, only the form creator's name will appear, as shown in the below screen.



To add Research Team Members, select 'Yes' to question 2.6 (for University of Leeds members only).



GIVING RESEARCH TEAM MEMBERS PERMISSIONS (THIS SHOULD ALSO INCLUDE RESEARCH ASSISTANTS)



To add External Team Members, select 'Yes' to question 2.7

Section 2. External Research Team Member

2.7 Are there other members included in the research team from outside of the University of Leeds? (External research team members/collaborators?)

Yes
 No

External Team Members details can be added to your application manually. Simply add to the text boxes.

2.7b External Research Team Member / Collaborator

(Please note, for security purposes this application form cannot be shared through Phoenix with external users; this section is for naming external research team members only. A PDF of this application form can be downloaded.)

If you are sharing any research data with external collaborators/stakeholders, please check if you require a data sharing/processing agreement (more information can be found in the data management plan template).

First Name

Surname/Family Name

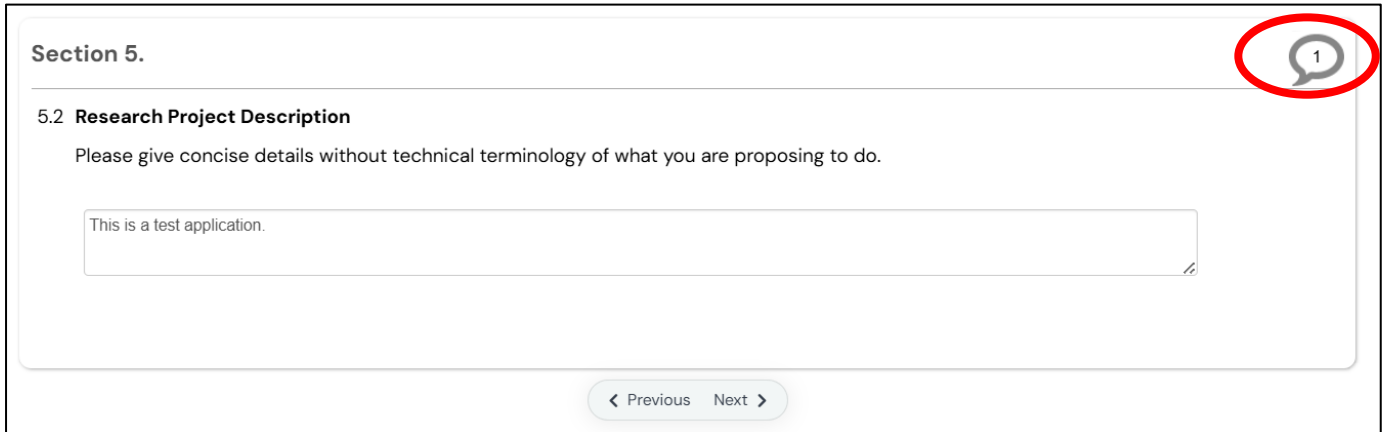
Organisation

< Previous Next >

COMMENTING ON AN APPLICATION FORM

If you have 'Shared' your application form with either your Supervisors and/or Research Team/Collaborators, they will be able to make comments on any question within the application.

To do this, click on the 'speech bubble'.



Section 5.

5.2 Research Project Description

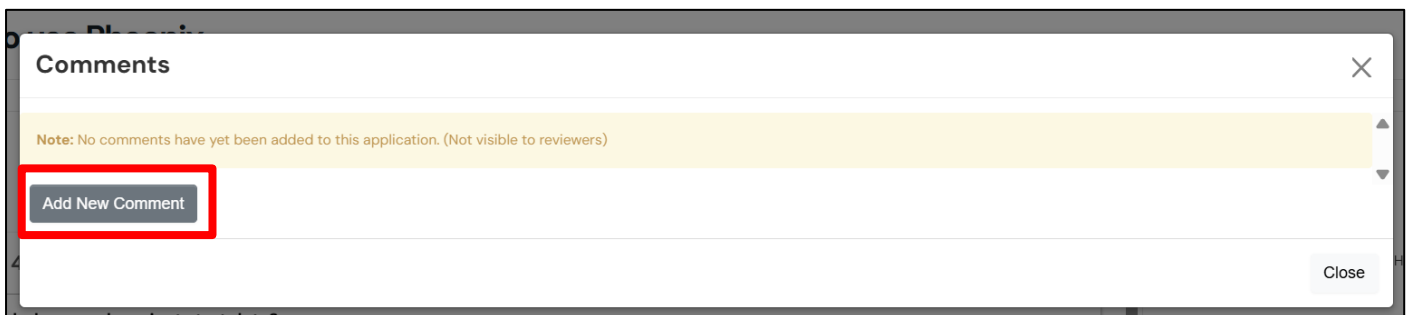
Please give concise details without technical terminology of what you are proposing to do.

This is a test application.

< Previous Next >

A red circle highlights a speech bubble icon in the top right corner of the form section, containing the number 1.

The 'Comments' screen will appear. Click on 'Add New Comment'



Comments

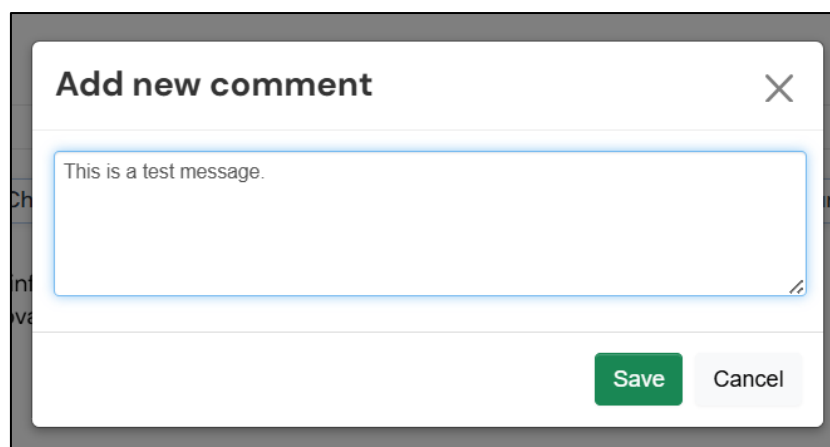
Note: No comments have yet been added to this application. (Not visible to reviewers)

Add New Comment

Close

The 'Add New Comment' button is highlighted with a red rectangle.

Add text to your comment in the text box, as below and then press 'save'.



Add new comment

This is a test message.

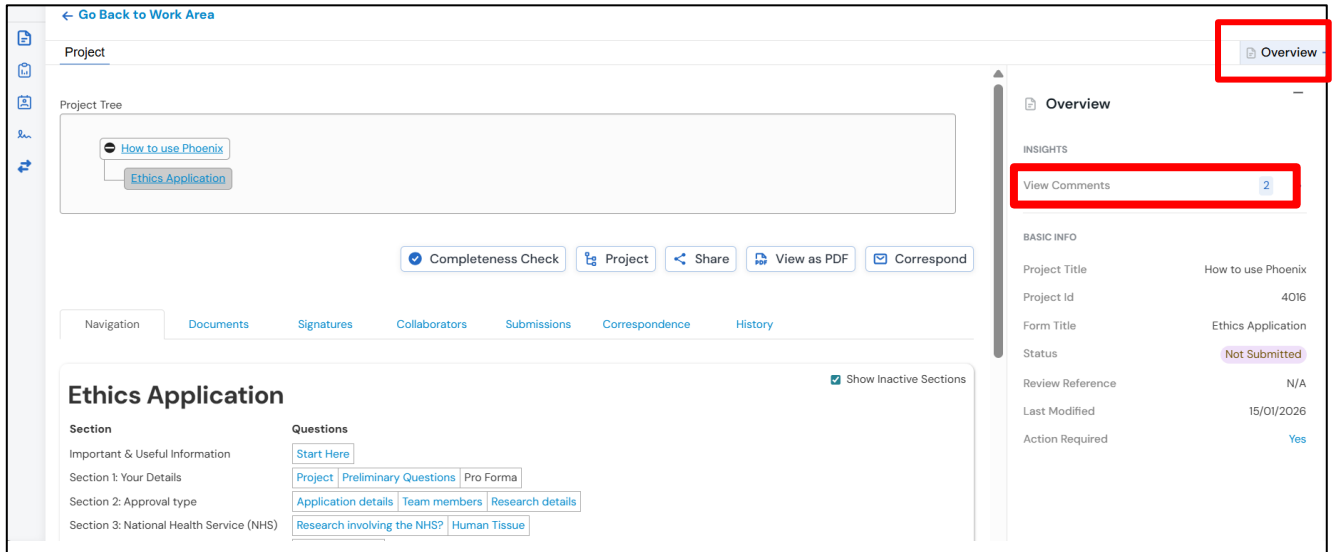
Save Cancel

The text box contains the text 'This is a test message.' and the 'Save' button is highlighted in green.

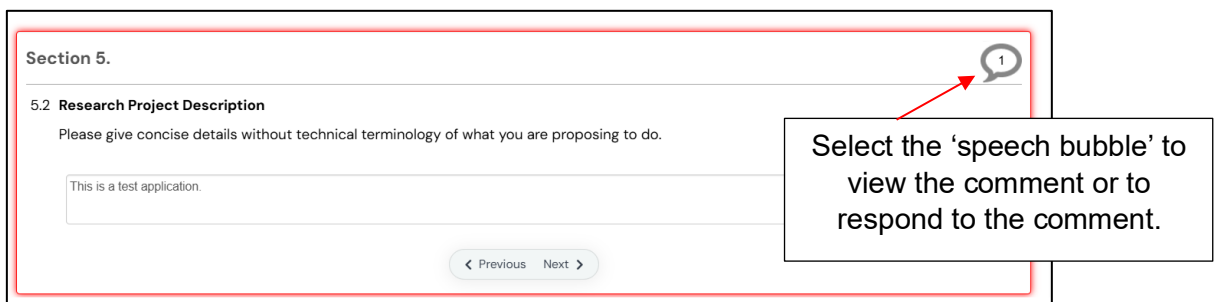
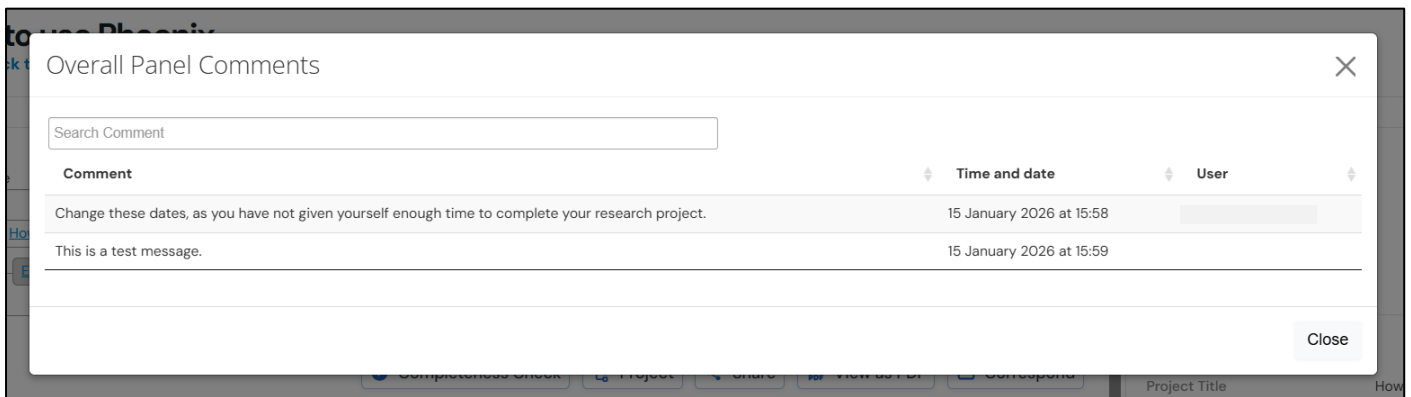
If any members of your Research Team or Supervisory team, make a comment on your application, comments can be viewed in the Overview panel.

You will **not** receive an email notification if comments are added as shown above.

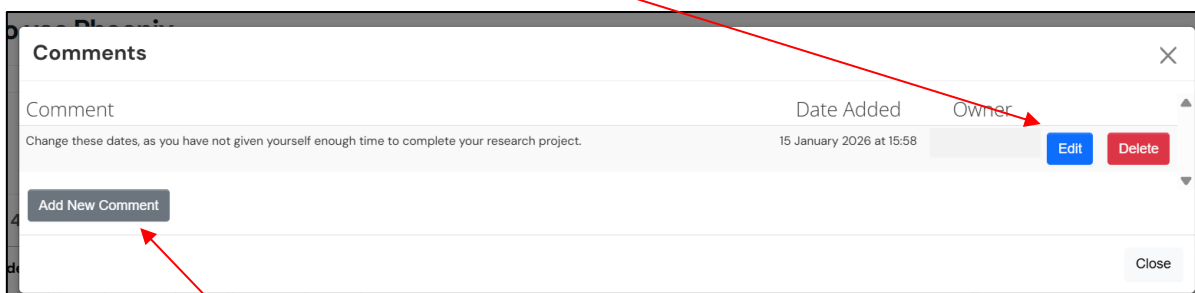
COMMENTING ON AN APPLICATION FORM CONT.



Click on each comment, and it will take you to that part of the application.



These comments can be edited or deleted

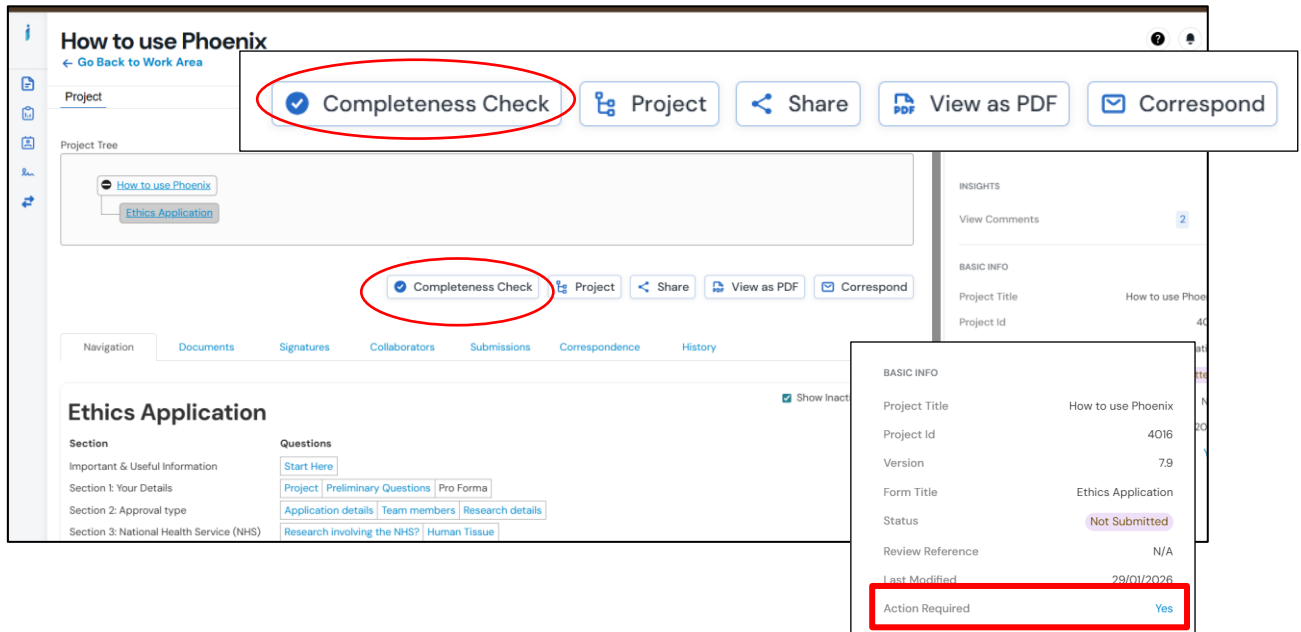


Or add another comment.

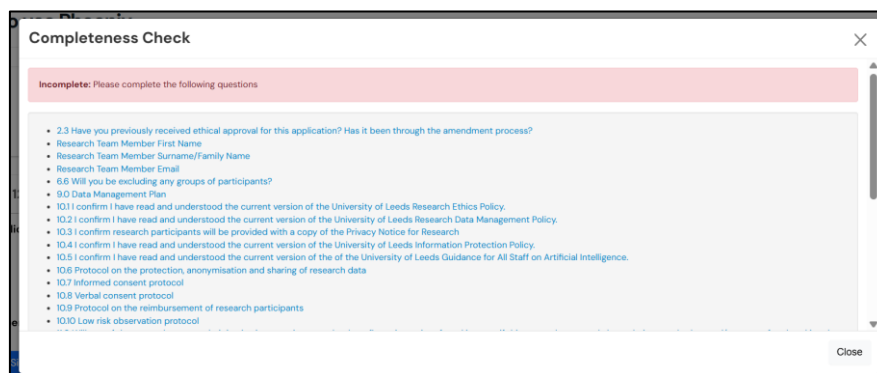
SUBMITTING YOUR APPLICATION

Once your application is complete and you have uploaded all the relevant supporting documents, it is time to submit.

To check you have remembered everything, select 'Completeness Check' or click on the blue **Yes** hyperlink in the Action Required section of the Overview.



Phoenix will provide a list of mandatory questions that have not been completed. This check can be run at any time prior to submission of the application.



There is NO 'Submit' button. The form will be automatically submitted once any mandatory signatures have been provided.

NOTE: Auto submission may not be initiated immediately, normally within 10 minutes.

EMAIL NOTIFICATIONS FOR STUDENTS

After the application has been submitted, you will receive an email notification. It is important to note that these notifications come from an external provider and can sometimes land in your Junk mailbox.

As soon as your Supervisor has accepted the signature request, (and depending if you have signed the form before requesting the signature), it will be automatically submitted to your Research Ethics Committee for review.

Subject: Re: Your Signature Request

CAUTION: External Message. Use caution opening links and attachments.

Dear Ms Smith

Your signature request has been accepted by Dr. Joe Bloggs.

To view the status of your signature requests, click on the following link:

<https://researchethics.leeds.ac.uk/Signatures/Index>

OR

Subject: Re: Your Signature Request

CAUTION: External Message. Use caution opening links and attachments.

Dear Ms. Testing Person,

Your signature request has been rejected by Dr Joe Bloggs.

To view the status of your signature requests, click on the following link:

<https://researchethics.leeds.ac.uk/Signatures/Index>

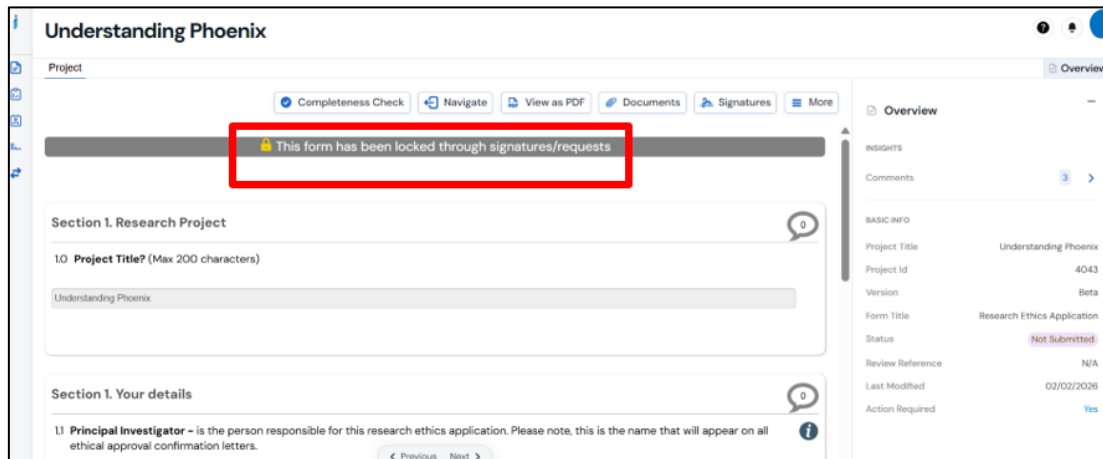
Please regularly check your Junk mailbox for any of the Phoenix notifications.

UNLOCKING YOUR APPLICATION IF SIGNATURE REQUEST REJECTED

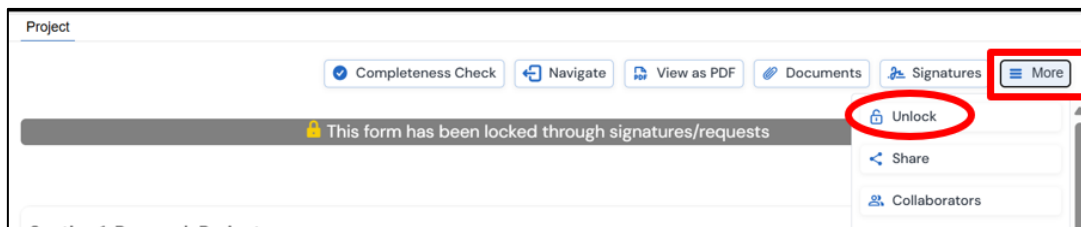
An applicant can only Unlock a form when:

- Signature requested from Supervisor (Supervisor rejects your request).
- Signature Request made to your Supervisor and you change your mind.

Open application.



Select the 'More' button and then select 'Unlock'.

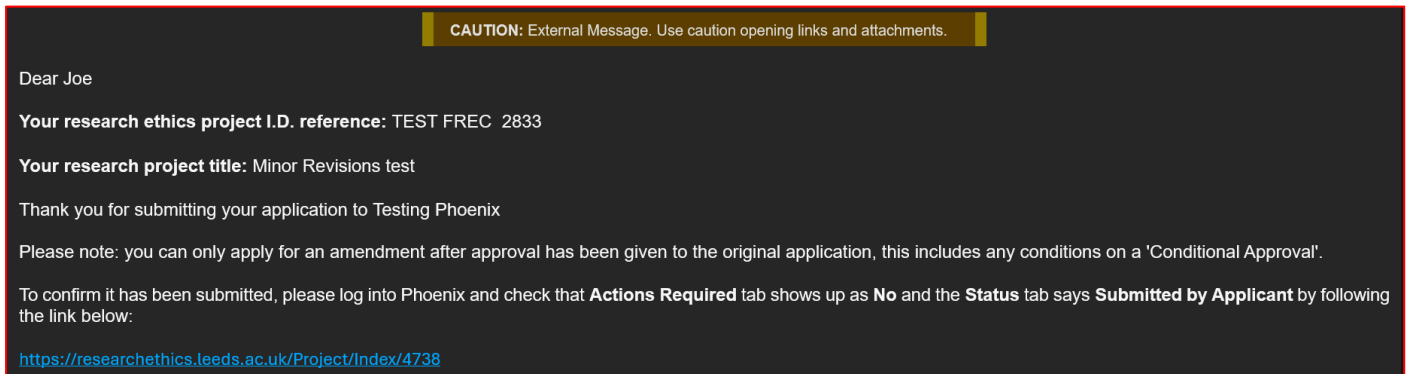


Select 'Confirm'.



EMAIL NOTIFICATIONS FOR STAFF RESEARCHERS

After the application has been submitted, you will receive an email notification. It is important to note that these notifications come from an external provider and can sometimes land in your Junk mailbox.



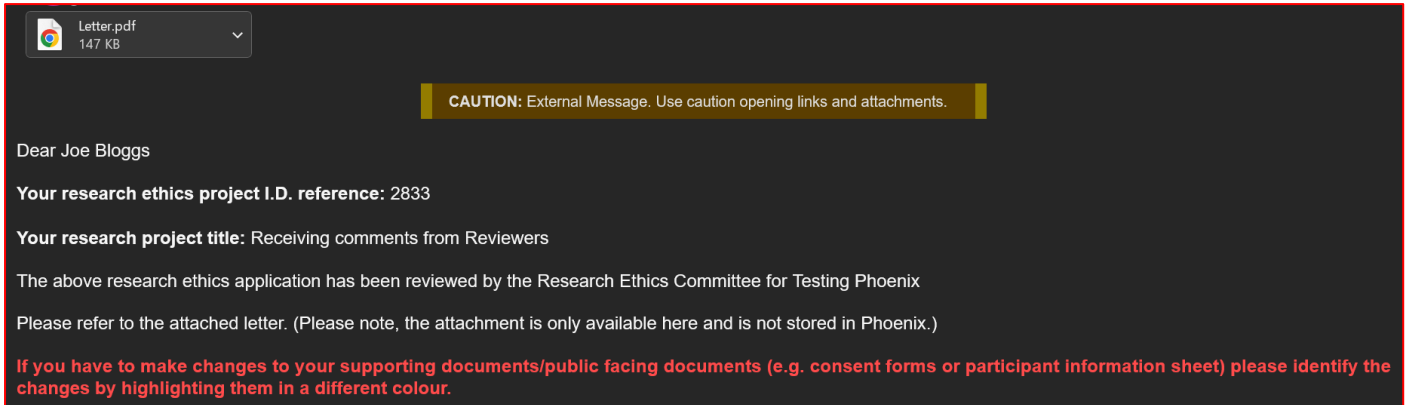
If you have given your Research Team Members permission to receive notifications, they will also receive the above email and similar.

The system will notify you as shown above, when your application has been submitted, when there are comments to be addressed from the Reviewers and when you have received ethical approval.

Please regularly check your Junk mailbox for any of the Phoenix notifications.

REVIEWER COMMENTS OR COMMENTS TO ADDRESS

You will receive an email notification. The attached letter will/should give you a list of the Reviewers Comments (if it does not, please contact your [Research Ethics Administrator](#) [immediately](#).)



Open your application

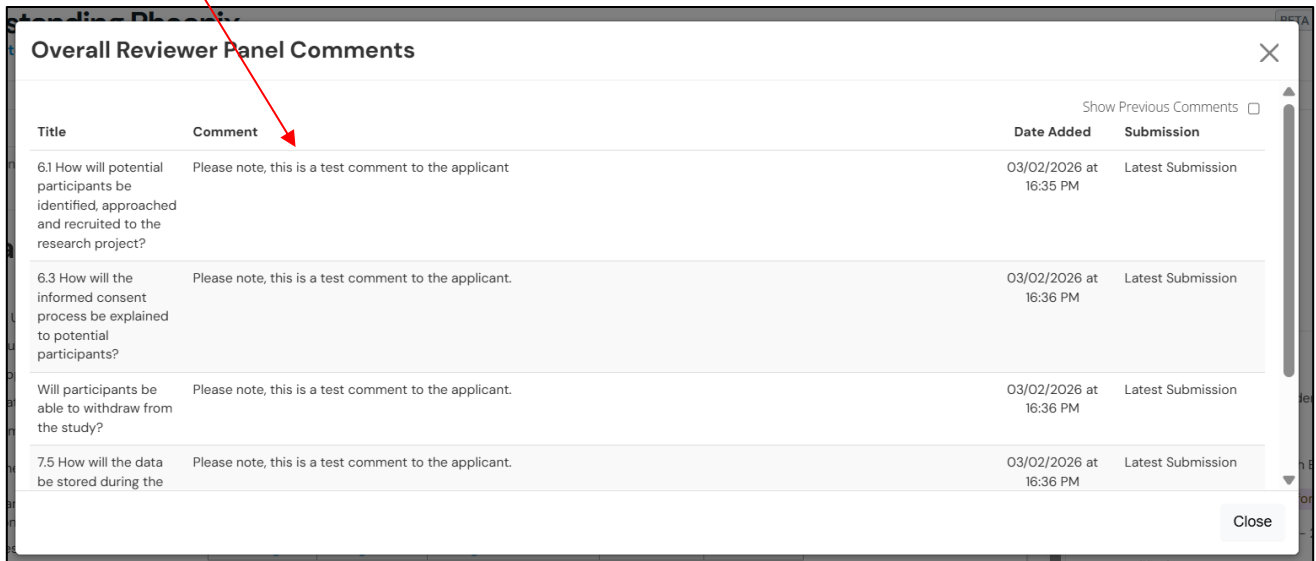
Form Title	Form Reference	Review Reference	App Type	Status	Form Owner
Research Ethics Application	Research Ethics Application	TEST - 2026 4043-6046	Testing Phoenix	Further Information Required	

Go to 'Overview' and select 'Reviewer Comments'

The screenshot shows the 'Understanding Phoenix' application overview page. The main content area is titled 'Research Ethics Application' and contains a 'Questions' section with various links like 'Start Here', 'Important Information', 'Project', 'Preliminary Questions', etc. On the right side, there is an 'Overview' sidebar. In this sidebar, under the 'INSIGHTS' section, the 'Reviewer Comments' link is highlighted with a red box, showing a count of 5. Other sections in the sidebar include 'BASIC INFO' with details like Project Title, Project Id, Form Title, Status, Review Reference, Last Modified, and Action Required.

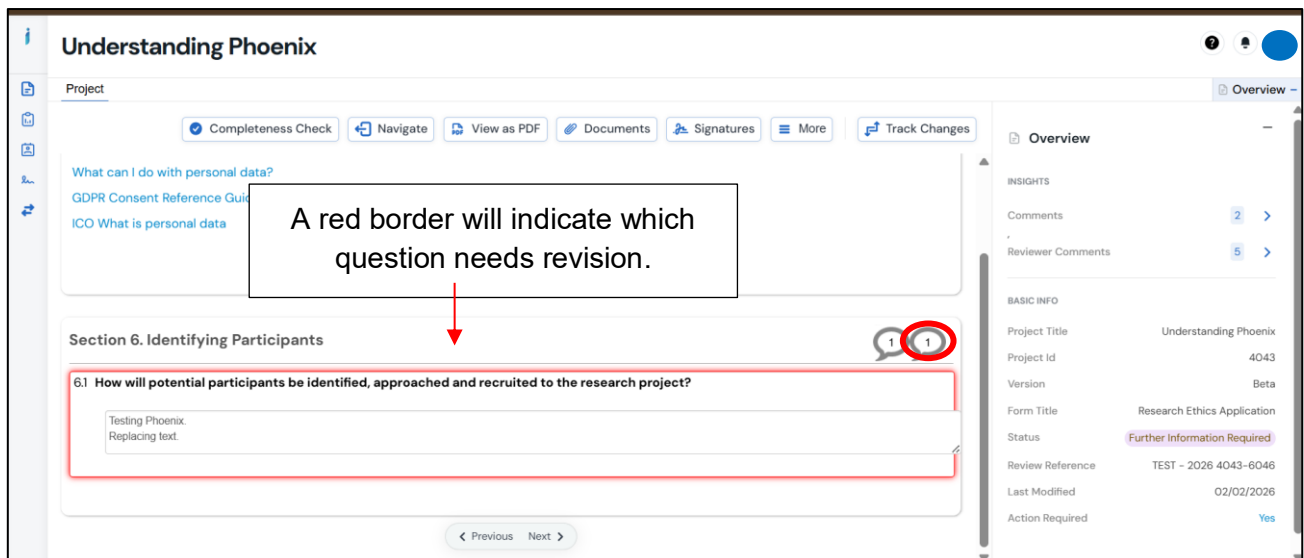
REVIEWER COMMENTS OR COMMENTS TO ADDRESS CONT.

Clicking on the text will take you directly to the question relating to the comment.

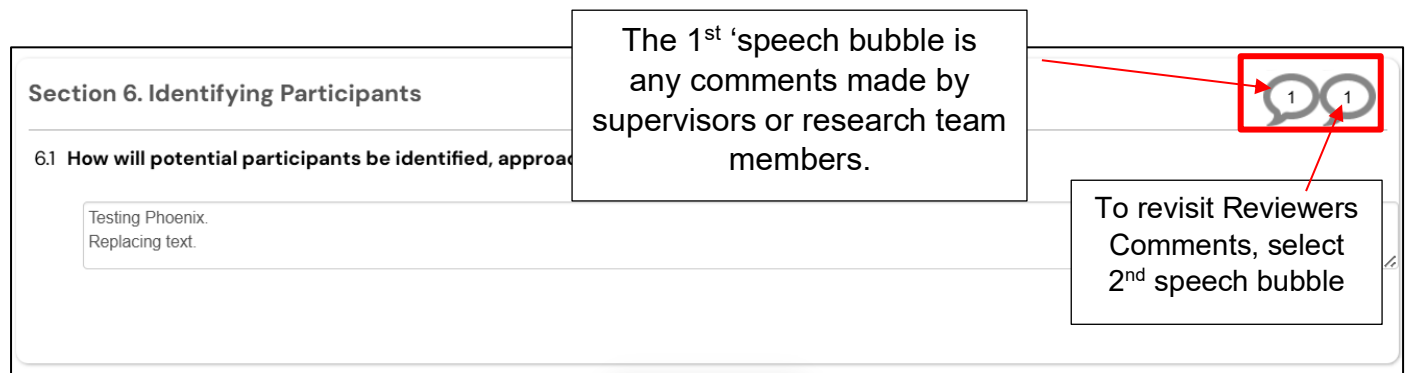


Title	Comment	Date Added	Submission
6.1 How will potential participants be identified, approached and recruited to the research project?	Please note, this is a test comment to the applicant	03/02/2026 at 16:35 PM	Latest Submission
6.3 How will the informed consent process be explained to potential participants?	Please note, this is a test comment to the applicant.	03/02/2026 at 16:36 PM	Latest Submission
Will participants be able to withdraw from the study?	Please note, this is a test comment to the applicant.	03/02/2026 at 16:36 PM	Latest Submission
7.5 How will the data be stored during the	Please note, this is a test comment to the applicant.	03/02/2026 at 16:36 PM	Latest Submission

Another way to see the 'Reviewers comments' is to select the 2nd 'speech bubble' above the question.



A red border will indicate which question needs revision.



The 1st 'speech bubble' is any comments made by supervisors or research team members.

To revisit Reviewer Comments, select 2nd speech bubble

Repeat the above steps to respond to all of the Reviewer Comments.

TRACK CHANGES

IMPORTANT NOTE: once the application form is submitted, text cannot be deleted from the form. There will always be a version within previous submissions that can be viewed.

Track changes allow you to compare the application form as it was when it was last submitted, against its current state.

Section 6. Identifying Participants 1 1

6.1 How will potential participants be identified, approached and recruited to the research project?

Testing Phoenix.
Replacing text.

Completeness Check Navigate View as PDF Documents Signatures More **Track Changes**

Project Overview + Track Changes -

Useful Information

[What can I do with personal data?](#)
[GDPR Consent Reference Guide](#)
[ICO What is personal data](#)

Section 6. Identifying Participants

6.1 How will potential participants be identified, approached and recruited to the research project?

Testing Phoenix.
Replacing And then replacing this with more text.

< Previous Next >

Exit Track Changes

Track Changes

COMPARE WITH

Review reference: TEST - 2026 4043-6046
Submitted on: 2026-02-02
Submitted by:

This Page All Changes

> PARTICIPANTS
> SIGNATURES

The form is not editable when viewing track changes. To exit, press “Exit Track Changes”.

REVIEWER COMMENTS – MAKING CHANGES TO SUPPORTING DOCUMENTS

If you make changes to your Supporting Documents/Public facing documents (e.g. consent form, participant information sheet) please make sure these are easy for the reviewers to identify (e.g. by highlighting them in a different colour in the document).

7.3 Participant Information Sheet (PIS)

There may be a requirement for different Participant Information Sheets for each group of participants (e.g. children, parents, teachers, head teachers).

Type	Document Name	File Name	Version Date	Version	Size	View	Delete
Participant Information Sheet	Template_Participant_Information_Sheet_Feb_2019 (2)	Template_Participant_Information_Sheet_Feb_2019 (2).doc		1.2	83.0 KB	Download	Delete

[Upload Document](#)

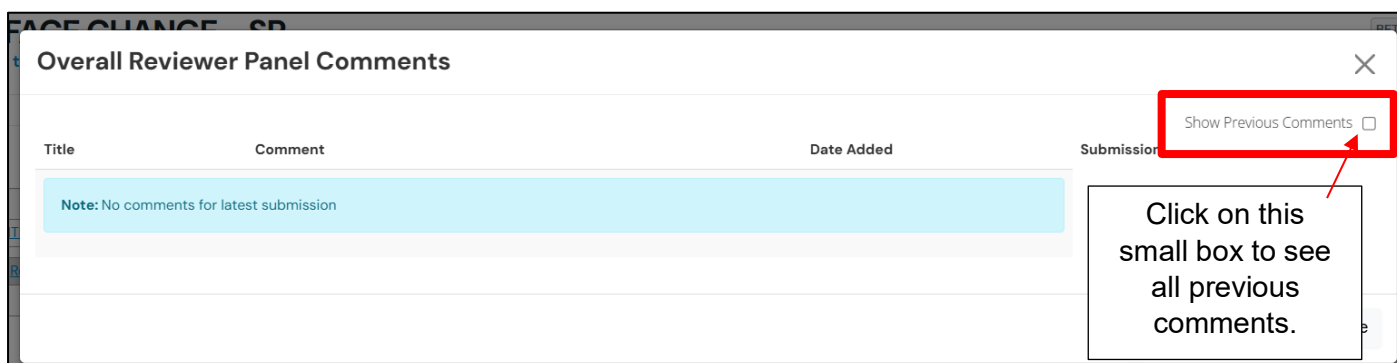
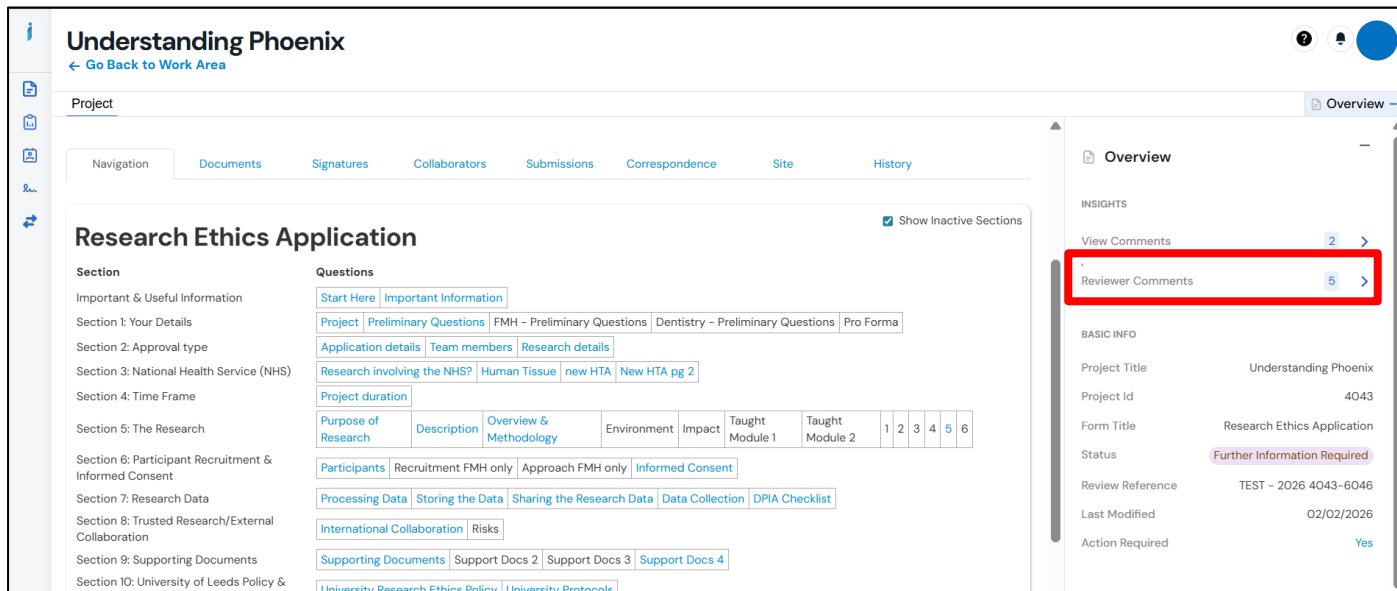
Example of Participant Information Sheet with requested changes ‘highlighted’ in yellow. This will help speed up the review of any supporting documents.

The screenshot shows a document header for 'Testing Phoenix Committee' and 'UNIVERSITY OF LEEDS'. The main title is 'Participant Consent to take part in "Understanding Phoenix"'. A text box contains the following text: 'I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason and without there being any negative consequences'. Below this, another line of text reads: 'In addition, should I not wish to answer any question or questions, I am free to decline.' To the right of the text box, there is a vertical instruction: 'If you agree to the statement, please sign with your initials below'.

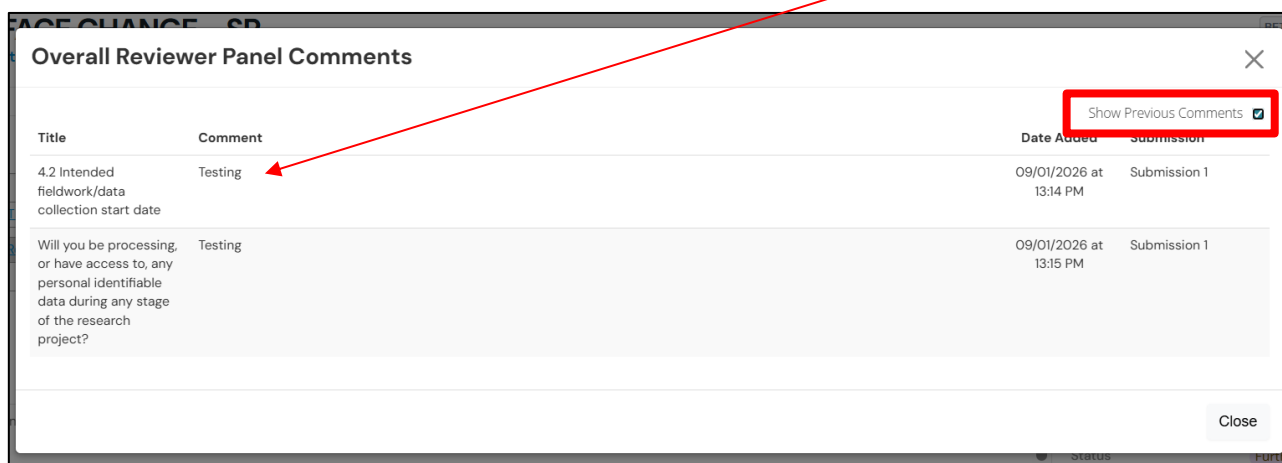
PREVIOUS COMMENTS (FROM REVIEWERS)

If the Reviewer Comments were not visible the first time the application was returned to you, or if the Reviewers ask you to address previous comments:

Open up the application and select “Reviewer Comments”.



Clicking on the text will take you directly to the question relating to the comment.



Repeat above process to see all previous comments.

RE-SUBMITTING AFTER RESPONDING TO REVIEWERS' COMMENTS

Please remember to sign and request any Supervisor/mandatory signatures, if you do not, the application will not be reviewed, as the Admin team / Reviewers cannot see your application when it is with you.

NOTE: Auto submission (signing the form) may not be initiated immediately, normally within 10 minutes.

Section 12. Signing the form

12.11 **Applicant's Signature**

[Sign](#)

12.12 **Supervisor's Signature**

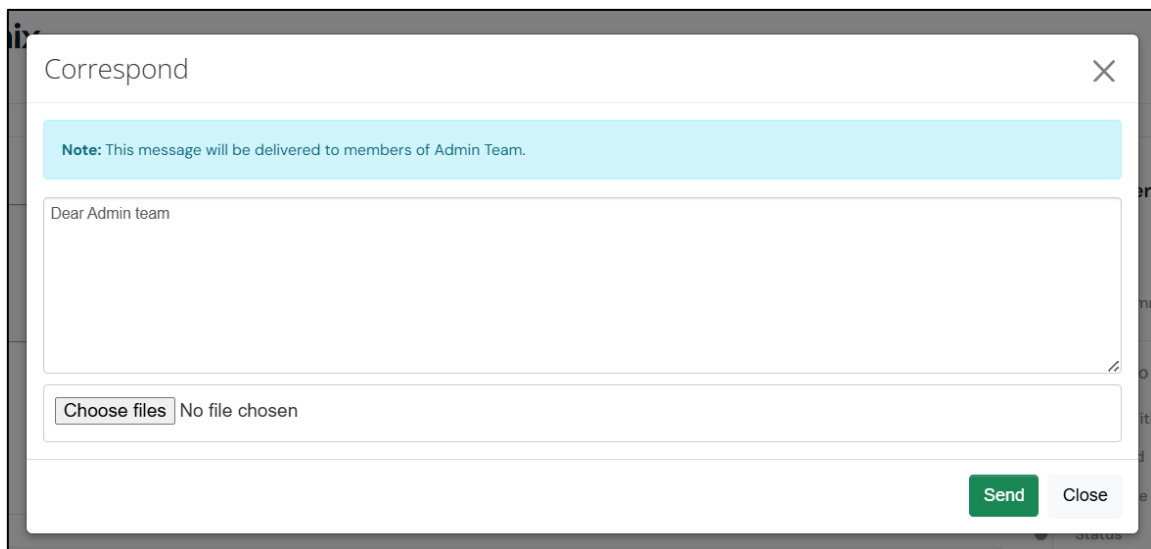
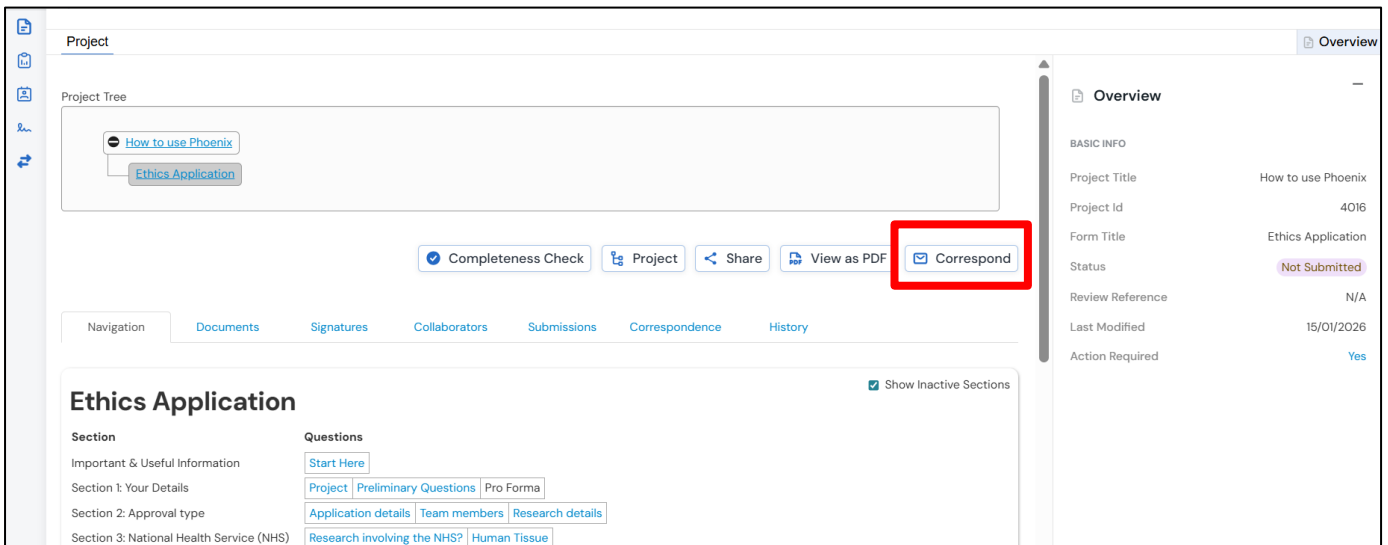
[Request Signature](#)

CORRESPONDENCE TAB

The “Correspondence Tab” enables communication with the Research Ethics and Integrity Admin team. **We strongly advise you to email the [Admin team](#) rather than use this function.**

There is an upload option, but this is NOT an easy route to take if you accidentally forget to upload a supporting document after submission, as the Reviewers have no access to this function and only one document can be uploaded per message.

If you request a document to be uploaded in mid-review or an approved application, you will not be able to view the document. It is not viewable to you or auditors; it is simply stored under your other documents.



If you choose to use this function, it is important to remember when the Research Ethics & Integrity Admin team respond, you will have to check the application in Phoenix, as there is no email notification for this function.

CORRESPONDENCE TAB CONT.

To view the message, click on the "Correspondence tab".

The screenshot shows the top section of the application. On the left, a 'Project Tree' contains a folder 'Understanding Phoenix' which is expanded to show 'Research Ethics Application'. Below this is a toolbar with buttons for 'Completeness Check', 'Project', 'Refresh', 'View as PDF', and 'Correspond'. A navigation bar below the toolbar contains tabs for 'Navigation', 'Documents', 'Signatures', 'Collaborators', 'Submissions', 'Correspondence', 'Site', and 'History'. The 'Correspondence' tab is highlighted with a red circle. Below the navigation bar, the main heading 'Research Ethics Application' is displayed, with a 'Show Inactive Sections' checkbox on the right.

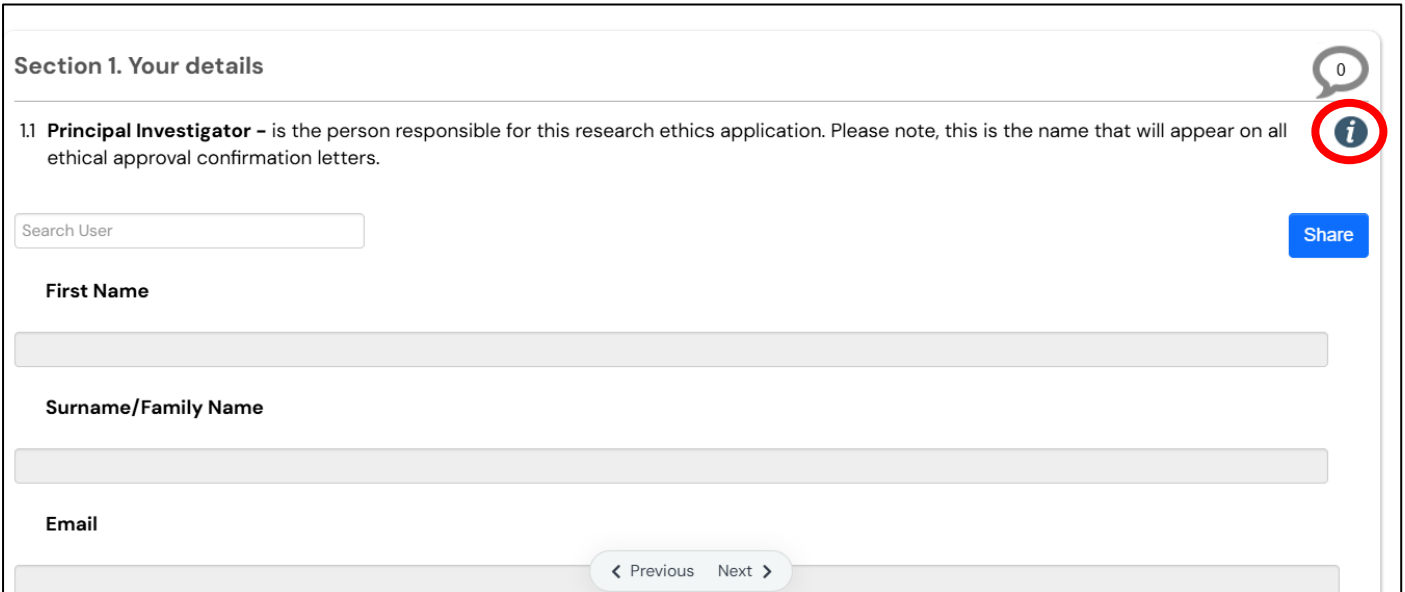
Click to open the message.

This screenshot shows the 'Correspondence' tab selected in the navigation bar. A callout box with the text 'To reply click on this tab' has a red arrow pointing to the 'Correspondence' tab. Below the navigation bar, there is a 'New Correspondence' button and a search input field labeled 'Search correspondence:'. A table lists correspondence entries with columns for 'User', 'Date', 'Message', and 'Attachment'. The first entry is highlighted in yellow and contains the text 'Hello, This is a response to your test message. Regard...'. The second entry contains 'This is a test message.'. At the bottom, it says 'Showing 1 to 2 of 2 entries' and includes pagination controls: 'First', 'Previous', '1', 'Next', 'Last'.

The screenshot shows a 'Correspondence Message' dialog box. At the top, it says 'Date 06/02/2026 14:24'. The main content area displays the message text: 'Hello, This is a response to your test message. Regards, Joe'. Below the message, there is a light blue note that says 'Note: No correspondence attachments'. A 'Close' button is located at the bottom right of the dialog box.

INFORMATION TAB

Attached to some questions, is an “information” tab. To view its content, click on the 



Section 1. Your details

1.1 **Principal Investigator** - is the person responsible for this research ethics application. Please note, this is the name that will appear on all ethical approval confirmation letters.


Search User Share

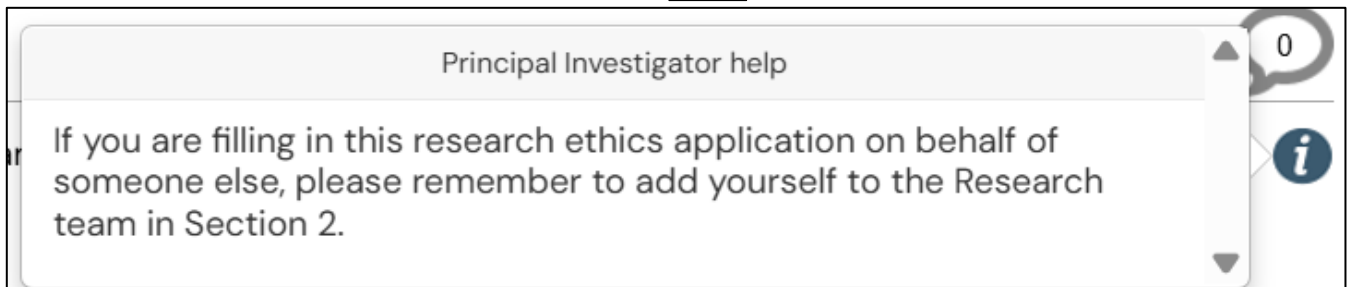
First Name

Surname/Family Name

Email

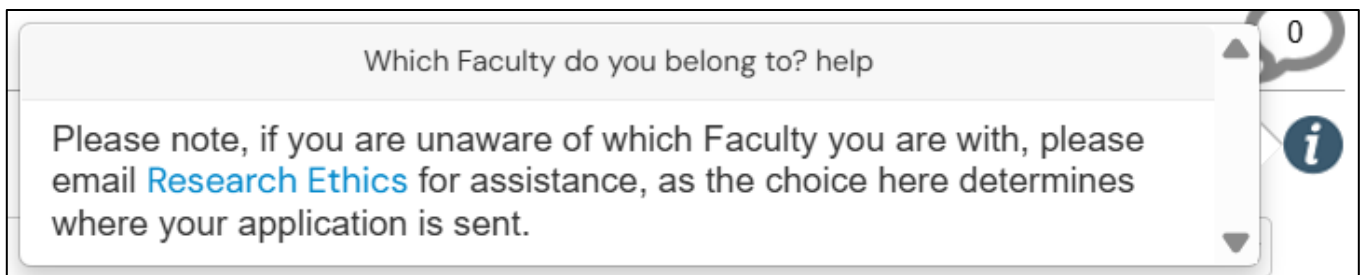
< Previous Next >

To close the “information” tabs down, re-click on 



Principal Investigator help

If you are filling in this research ethics application on behalf of someone else, please remember to add yourself to the Research team in Section 2.



Which Faculty do you belong to? help

Please note, if you are unaware of which Faculty you are with, please email [Research Ethics](#) for assistance, as the choice here determines where your application is sent.

Please note, not all the questions have this function.

SUPPORTING DOCUMENTS/PUBLIC FACING DOCUMENTS

Below is a list of the supporting documents you will need to upload to this application. All the templates are also available from the [Research Ethics webpages](#) and from the Phoenix [Help Tab - Templates](#), select the ? icon, top right hand side of your screen.

TEMPLATES

[Data Management Plan \(DMP\)](#) - is a requirement for all ethics applications. Please read [data management planning](#) (DMP) for further information on how to plan and create your DMP. Download the [basic DMP template](#).

[Participant Consent Form](#) - you may need to produce different versions of the consent forms for different groups of participants or different activities. For more information, please read the [approaching & recruiting participants](#) guidance.

[Easy-read Participant Consent Form](#) – to assist with gaining consent from protected adults or children.

[Participant Information Sheet \(PIS\)](#) – this should be designed to be clear, simple, and jargon-free, tailored to your specific participant group. Please upload different versions for different groups of participants. Please include a hyperlink to the [Research Participant Privacy Notice](#) within your PIS.

[Easy-read Participant Information Sheet](#) - to assist with gaining consent from protected adults or children.

[Consent for Questionnaires & Surveys](#) – (includes example introductory paragraph)

REQUIREMENTS

[Research Participant Privacy Notice](#) - a link must be included in the Participant Information Sheet or a printed copy handed to the participants.

[Fieldwork Risk Assessment](#) - is required for any research activities taking place off campus, this includes any overseas travel.

[General Health & Safety Risk Assessment](#) – is required for laboratory based research. Please check if there are any other requirements/protocols you need to follow before the start of your project.