



IRBManager

User Guide for IACUC

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1.0 IRBManager Introduction and Login

1.1 What Is IRBManager?

IRBManager is an electronic management system that serves as the “front door” for the submission, tracking, and retention of research protocols and research compliance documents. This includes Institutional Animal Care and Use Committee (IACUC) application forms. Users can fill out and submit forms directly in IRBManager, and all forms, attachments, and documents submitted with a participating study (protocol) will be accessible via IRBManager. IRBManager is a fully web-based system that is accessible both on- and off-campus.

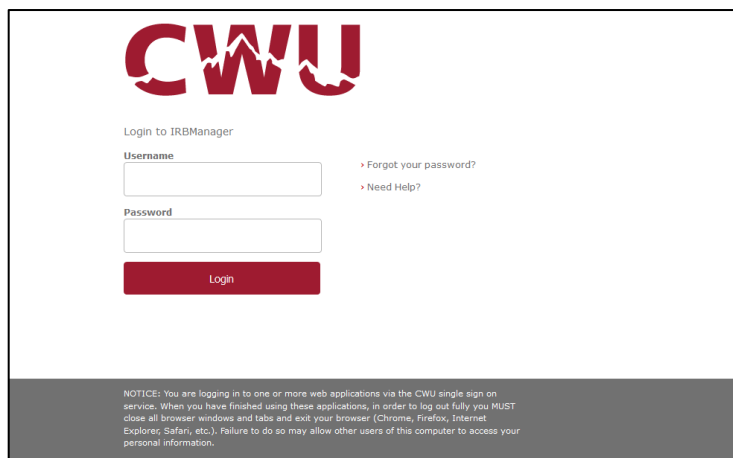
1.2 How Do I Access IRBManager?

IRBManager can be accessed here: <https://cwu.my.irbmanager.com>. The following login page will appear:



1.2.1 CWU-Affiliated Users

Click the “To login using your CWU username and password click here” hyperlink (or simply click the large CWU logo in the middle of the page). You will then be prompted to enter your CWU credentials (network email and password) in a separate pop-up window.

A screenshot of the CWU IRBManager login form. At the top left is the CWU logo. Below it is the text "Login to IRBManager". There are two input fields: "Username" and "Password". To the right of the "Username" field are two links: "> Forgot your password?" and "> Need Help?". Below the input fields is a red "Login" button. At the bottom of the page, there is a notice: "NOTICE: You are logging in to one or more web applications via the CWU single sign on service. When you have finished using these applications, in order to log out fully you MUST close all browser windows and tabs and exit your browser (Chrome, Firefox, Internet Explorer, Safari, etc.). Failure to do so may allow other users of this computer to access your personal information."

Upon entering your credentials, you will automatically be redirected to the IRBManager Dashboard screen/home page (see Section 3.0).

1.2.2 Externally-Affiliated Users

Non-CWU users (e.g., IACUC community members, project co-investigators at another institution, etc.) must be issued an IRBManager username and password to access the system. This is done manually by IACUC staff. Contact staff via email at iacuc@cwu.edu. Include in the subject line “IRBManager Access for Non-CWU User.” Provide an email address for the non-affiliated user.

Upon being added into the system, the new user will receive an email with their username and temporary password. If this password link is not used within 24 hours, it will become inactive. In this case, the user will instead need to use the “Non-CWU affiliated users, click here to login” hyperlink on the login page and then click on the “Forgot Password?” link to reset their password.

Upon entering your credentials, you will automatically be redirected to the IRBManager Dashboard screen/home page (see Section 3.0).

1.3 Passwords

Once you log in with your username and password, you will be able to provide an electronic signature on any xForm (protocol submission form) by entering your password.

If you have forgotten your password, please click the “Forgot Password?” link on the login screen.

1.3.1 CWU-Affiliated Users

CWU users are prompted for their username and current network password upon login to IRBManager. (If your CWU network password has recently changed, you will need to enter your new network password the next time you login into IRBManager.) You will never need to change your password in IRBManager.

1.3.2 Externally-Affiliated Users

For those unaffiliated with CWU, on your first login, you will be prompted to change your password.

Home Find Study (Ctrl+Q)

Change Password Help Researcher's Settings Sign off

Valid Passwords

A valid password must be at least 6 characters long, be different from the user name, and contain characters from at least 3 of these groups: uppercase letters, lowercase letters, numbers, and special characters (e.g. !, @, #, ~).

Change Password

User TEST, Researcher

Username cwu.researcher@gmail.com

Old Password

New Password

New Password Confirm

Update

Your new password must be at least 6 characters long and contain characters from at least 3 of these groups: uppercase letters, lowercase letters, numbers, and special characters (e.g. !, @, #, ~).

To change your password and proceed:

1. Enter current password
2. Enter new password (see requirements above) and then enter new password again to confirm
3. Click “Update”

If on any future log-ins you enter the wrong username/password three times, IRBManager locks your account as a security precaution. If that happens, you can click the “Forgot Password” link from the login screen. After filling in the information requested, a new password will be emailed to you and your account will be unlocked.

2.0 Navigating the Home Page – Dashboard

Once you are logged in, you will be directed to the dashboard, which looks like this:

2.3

The screenshot shows the CWU IRBManager dashboard. The top navigation bar includes links for Home, Meetings, Create Study, Reports, Contacts, and Administration. The main content area is titled 'My Studies' and displays three sections: 'Studies (0 Active)' with a message 'You are not associated with any Studies.', 'xForms (0 Active)' with messages 'You have 0 unsubmitted xForms.' and 'You have 0 xForms being processed at a later stage.', and 'Events (0 Open)' with the message 'You have no open events.' Below these is a table header for 'My Studies (0 Active)' with columns for Study, Site, PI, Title, Expires, and Status. The sidebar on the left contains 'Actions' (New HSRC Application, New IACUC Application, Start xForm, View as Myself), 'Recent Items' (2017-004-ONL, 2017-003-ONC, 2017-005-ONL, 2017-001-ONL), and 'My Docs & xForms' (0 Attachments, 0 xForms). The right sidebar contains 'Notices' with a welcome message and instructions for using the dashboard. A search bar at the top right contains the text 'Find Study (Ctrl+Q)'. A footer at the bottom indicates the page was generated in 0.155 seconds and is powered by IRBManager.

Read below for information on how to use and navigate away from the dashboard. To navigate back to the dashboard from another page, simply click “Home” at the top of the page.

2.1 Sidebar

On the left side of the dashboard, there are multiple headers:

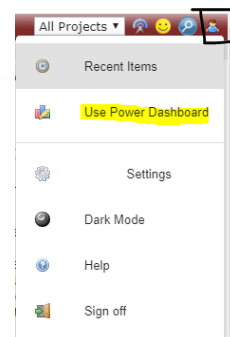
- **Actions** (see Section 2.1.1)
- **Recent Items** (see Section 2.1.2)
- Messages (*note: will only appear if there are messages posted*)
- Useful Links (*note: will only appear if there are links posted*)
- **My Docs & xForms** (see Section 2.1.3)

This sidebar will remain present as you navigate to different pages.

2.1.1 Actions

Click “New IACUC Application” or “Start xForm” to start a new protocol submission form (See Section 4.1.1). Please note that certain xForms (Amendment [modification] Form, Annual Review Form, and Final Report Form) can only be completed for a protocol that is already approved and active in IRBManager. These xForms are not available from the Dashboard. (See Section 5.1.2)

By clicking on “Use Bubble Dashboard” in the Actions menu, your dashboard will be changed to an alternate formatting. This user guide does not provide instructions on using the bubble dashboard. To return to the dashboard referenced in this user guide, click the Menu icon in the top right corner and select “Use Power Dashboard.”



Note: The items under the “Actions” heading will change as you navigate through the site to display appropriate actions corresponding to the current page.

2.1.2 Recent Items

The hyperlinks under this heading will show the most recent items you have viewed in IRBManager. Click on any link under “Recent Items” to go directly to that item.

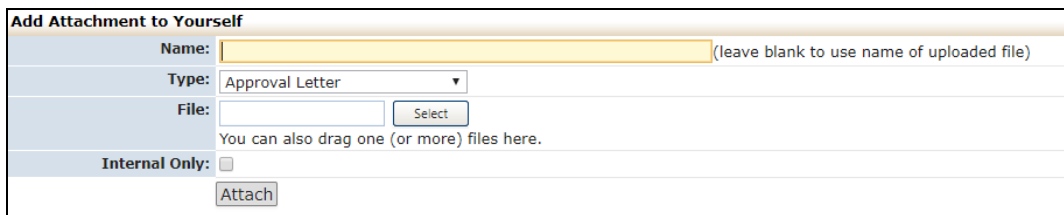
2.1.3 My Docs and xForms

This heading shows how many attachments and xForms (protocol submission forms) you have.

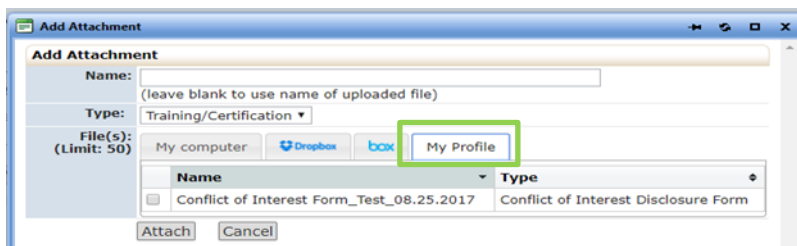
If you click the “__ Attachments” link, it will take you to a separate page showing your personal attachments. You can add attachments (e.g. SOPs, wildlife permits, etc.) to your IRBManager account by clicking “Add Attachment” in the Actions menu on the left sidebar:



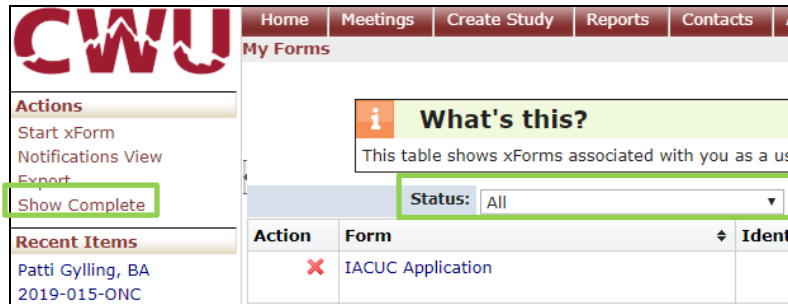
This will bring you to a page where you can name and upload a new attachment:



Once your documents are uploaded into your profile, they will only be viewable to you, but they will be available on any “Add Attachment” question asked on an xForm. You must first add attachments into the xForm for the IACUC to be able to view them. They can be accessed by clicking “Add Attachment” on any xForm question and then clicking on the “My Profile” tab in the pop-up window that appears:



If you click the “__ xForms” link under the “My Docs & xForms” header, it will take you to a separate page showing your xForms. On this page, under the “Actions” header on the left side of the screen, there is a toggle button to “Show Complete/Hide Complete” xForms. If you do not see previously completed xForms on this screen, it likely means you need to press the “Show Complete” button. There is also a “Status” drop-down menu at the top of the page where you can filter your search to show only certain xForms (e.g., unsubmitted, awaiting other signatures, complete, etc.):

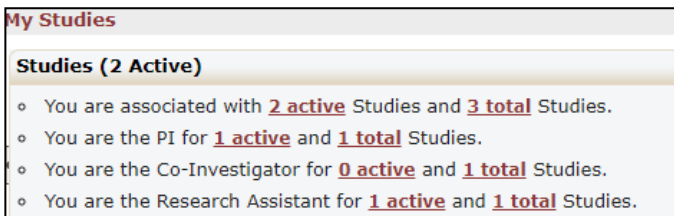


There is also a “Filter” search bar on the top right of this page where you can type in key words to narrow down the xForms displayed and quickly find your desired xForm.

2.2 My Studies

In the center of the Dashboard, there are four sections:

2.2.1 Studies (__ Active)



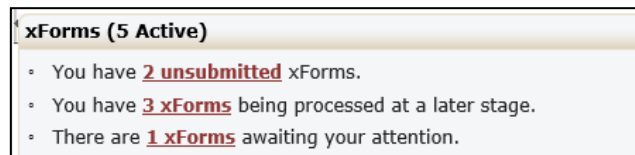
This shows your approved studies, organized by the capacity in which you are involved (as Principal Investigator [PI], Co-Investigator, Research Assistant,

or Faculty Supervisor). Both active and inactive studies are displayed here.

By clicking on an underlined link, you will be taken to a separate screen showing the pertinent studies.

2.2.2 xForms (protocol submission forms) (__ Active)

The xForms section shows your currently active protocol submission forms including Initial Submission, Annual Review, Amendment (modification), and Final Report.



In the above view of “xForms” section of the Dashboard:

- “You have 2 unsubmitted xForms” = The user has 2 xForms (protocol submissions) started, but has not yet submitted them for further processing. (The user may have clicked “Save for Later” or just closed an xForm before pressing the “Submit” button

at the end of the xForm.)

Note: By clicking the underlined link, “[2 unsubmitted xForms](#),” the user can go straight to the unsubmitted xForms to continue working on and/or to complete the submission.

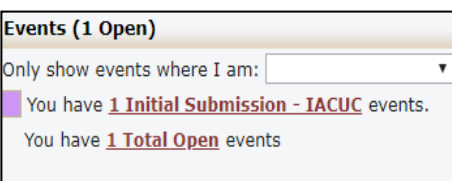
- “You have [3 xForms](#) being processed at a later stage” = In this case, the user has successfully submitted 3 xForms (protocol submissions), and the xForms are currently under review at a later stage in the processing cycle (e.g., faculty supervisor review or processing by IACUC administrator).
- “There are [1 xForms](#) awaiting your attention” = The user has 1 xForm that requires their attention and will not be processed to the next stage in the system until the user addresses and submits the xForm. This will appear if someone else sends an xForm to the user. (For example, a faculty supervisor will see this when a student PI sends an xForm to them for review and approval. The PI would see this if the IACUC administrator returned an xForm for revisions, etc.).

Note: By clicking the underlined link, “[1 xForms](#),” the user can go straight to the xForm that needs attention.

- “You have [__ xForms](#) in error” = The user has an xForm that has a back-end error. This is a software issue that the IACUC administrator will be made aware of and will resolve.

2.2.3 Events ([__ Open](#))

The events section of the Dashboard shows the submissions open by submission type.



This section shows all open events and the submission name, such as Annual Review, Initial Submission, and Amendment (modification).

Note: An event stays open until the IACUC is notified of the approval. It is possible for the xForm to be completed and approved, but the event is still open until an IACUC meeting occurs.

2.2.4 My Studies ([__ Active](#))

This section lists all of the active studies (protocols) with which the user is associated. By clicking on the blue link under the “Study” column, the user can go straight to the study (protocol).

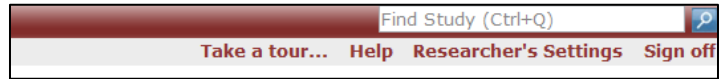
Study	Site	PI	Title	Expires	Status
2017-001-ONL	Online data collection	TEST, Researcher	Testing the New Electronic Submission System	10/09/2018	Open
2017-003-ONC	On campus	TEST, Researcher	Test Test Test - Ignore Please	01/02/2019	Open
2017-004-ONL	Online data collection	TEST, Researcher	To Test Expedited Approval with Conditions - Testing New System	10/23/2018	Open

Studies can be sorted in the list by study (protocol) number, site, PI, study title, expiration date, or status by clicking the corresponding arrows in each column header.

See Section 4.0 for how to navigate a study protocol page.

2.3 Top Headings

Find Study search bar = Search to find existing studies. Studies can be searched by study protocol number, site, PI name, title, expiration date, or status.



Take a tour... = Provides a basic overview of the sections on the Dashboard.

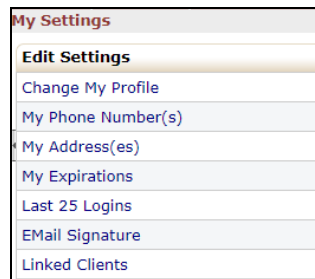
Help = Hovering over the “Help” button brings up several options, including “Contact Administrator.” Clicking on “Contact Administrator” allows you to send an email directly to the IACUC administrator.

(Note: If you click on “Help” rather than hovering over “Help,” you will get a message saying there is no help available for this page.)

(Your Name)’s Settings = Allows the user to edit their profile settings.

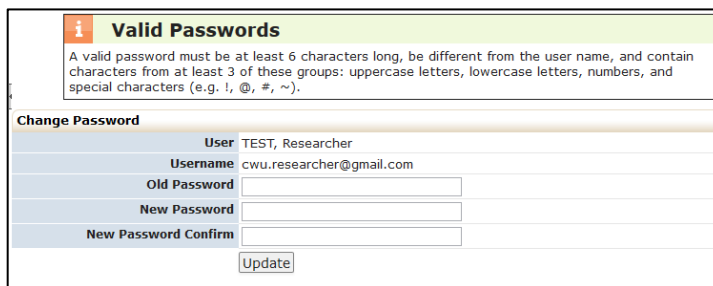
Sign off = Click to log off IRBManager.

After clicking “**(Your Name)’s Settings**,” the following options are available:



2.3.1 Change My Password

This is applicable only for externally-affiliated users without a CWU login credentials (e.g., IACUC community members). Click on “change password” link. You will then see this view:



1. Enter old password.
2. Enter new password. Your new password must be at least 6 characters long and contain characters, from at least 3 of these groups: uppercase letters, lowercase letters, numbers, and special characters (e.g., !, @, #, ~).
3. Click “Update.”

2.3.2 Change My Profile

1. Click on “Change My Profile” link. You will then see this view:

My Profile Help Researcher's Settings Sign off

User Information

Prefix (Mr, Dr, etc): First Name:

Middle Name: Last Name:

Suffix (Jr, III, etc): Degree:

Specialty: Email Address:

From Address for Outbound Email:

2. Update your name or other user information.
3. Click “Update.”

2.3.3 My Phone Number(s)

1. Click on “My Phone Number(s)” link.
2. To add a phone number, click the “Add Phone” link under the Actions menu in the left sidebar. You will then see this view:

Phone Book Add - TEST, Researcher (cwu.researcher@gmail.com) Help Researcher's Settings Sign off


Contact Name



Full Name: Email:

Phone Book

Phone Type: Phone:

Primary Number:

3. To update your phone number, click the edit icon  under the Action column corresponding with your phone number, make your changes, and click “Update Phone.”

Phone Book (1)			
Action	Primary	Type	Number
 	<input checked="" type="checkbox"/>	Home	123-456-7890

2.3.4 My Address(es)

1. Click on “My Address(es)” link.
2. To add an address, click the “Add Address” link under the Actions menu in the left sidebar. You will then see this view:

Address Book Add - TEST, Researcher (cwu.researcher@gmail.com) Help Researcher's Settings Sign off

Contact Name

Full Name: Email:

Address Book

Address Type: Country:

Street:


Line 2:



Line 3:

City:

State/Province: Zip/Postal Code:

Primary Address:

- To update your address, click the edit icon  under the Action column corresponding with your address, make your changes, and click “Update Address.”

Address Book (1)								
Action	Primary	Type	Street	City	State	Zip	Country	
 	<input checked="" type="checkbox"/>	Home	123 Main Street	Ellensburg	Washington	98926	United States	

2.3.5 My Expirations

Shows expiration dates for the researcher’s occupational health and medical clearance, CITI training certifications, etc. IRBManager should send out reminders to researchers as these expiration dates approach.

For expiration dates relevant to particular protocols, such as the Annual Review due date, refer to the study protocol page (see Section 4.2).

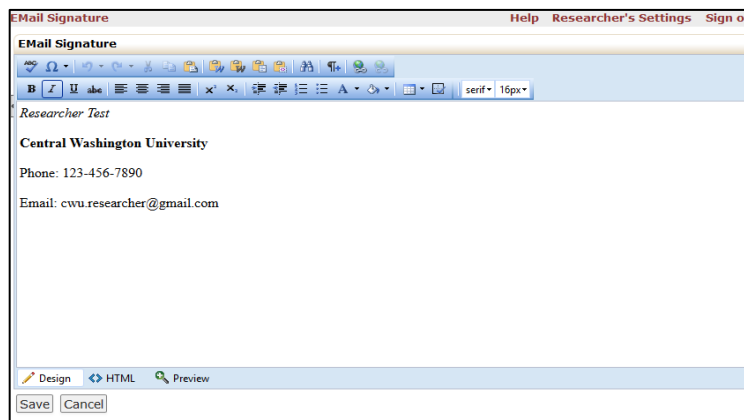
2.3.6 Last 25 Logins

Lists the time and date of the last 25 times the user logged into IRBManager.

2.3.7 Email Signature

Allows you to enter an email signature when sending email(s) through IRBManager.

- Click on “Email Signature” link.
- Enter your preferred signature.
- Click “Save.”



Note: You may copy/paste a signature (with an image) from another platform into IRBManager. If entering information directly, use ‘shift+enter’ to eliminate double spaces between line text.

3.0 Navigating the Study (Protocol) Page

From the Dashboard (home page) page, you can access the study details for each of your studies (protocols). Click on the blue study code (protocol number) link under “My Studies” at the bottom of the Dashboard (see Section 3.2) to access the specific study. You can click on any blue link in this section to view more information.

3.1 Study

This section notes all of the basic information about the individual study (protocol). There may be many blanks in this section for some studies (protocols).

▼ Study	
Study: 2018-046	Sponsor(s):
Committee: IACUC	Sponsor Id:
College/School:	Grants:
Department: Primate Behavior and Ecology	
Agent Types: Field Research - IACUC	CRO:
Title: TEST	Year: 2018
Animal Species to be Used: 52	
Comments:	

- Study = Protocol number
- Sponsor = if applicable
- Committee = IACUC
- Grants = if applicable
- Department = Principal Investigator’s parent department within the university
- Agent Type = applicable research types (i.e., Educational Use, Field Research, Lab Research, Standard Operating Procedures)
- Title = of the study or project
- Year = of initial approval
- Animal Species to be Used = lists the number of animals approved to be used per species

3.2 Study-Site

This section notes information about the study and the study site, such as:

Study-Site	
Site(s): ONL - Online data collection	PI: TEST, Researcher
Status: Open	Additional: N
Approval: October 10, 2017 for 12 months	Expiration: October 9, 2018
Initial Approval: August 31, 2017	Other Expirations:
Comments:	

- Site(s) = primary location of study
- PI = Principal Investigator’s name
- Status = open, approved, pending, withdrawn, closed, etc.
- Approval = date of recent/current approval of Annual Review
- Expiration = date of study (protocol) expiration
- Initial approval = date of study (protocol) approval
- Other Expirations = due date for Annual Review (required for protocols with durations longer than one year) or other items related to the protocol (for expirations that are

applicable to the Principal Investigator such as CITI trainings or occupational health medical clearance, see “My Expirations” in Section 3.3.5.)

3.3 Study-Site Contacts

This section lists the contact(s) and role(s), if any, associated with the study (protocol).

▼Study-Site Contacts (1)	
Name	Role
	Faculty Advisor

3.4 Reference xForms

This section lists the submission forms associated with the study (protocol) and corresponding action items that are possible for each one. This section enables you to complete an Amendment (modification) Form for your protocol (see Section 6.1.2).

▼Reference xForms (1)						
Action	Form	Identifier	Stage	As Of	Ref Active	Inactivated
	IACUC Application	Researcher	Complete	12/12/2018 at 4:15 PM	12/12/2018 at 4:15 PM	

3.5 Events

This section lists all the IRB “events” or submissions that have been or are being conducted for this protocol. These include Initial Submissions, Amendments (modifications), Annual Reviews, and Final Reports.

▼Events (1)						
Event	Att	FE	Instance/UDF	Start	Complete	Last Mtg
Initial Submission	3			10/24/2017	04/18/2018	01/12/2018

- Event = type of event (Initial Submission, Amendment (modification), Annual Review, Final Report, etc.)
- Att = number of attachments associated with that event
- FE = not currently in use
- Instance/UDF = information about an event; may be blank depending on responses in xForm
- Start = the date the event was started or loaded into IRBManager
- Complete = the date the event was completed and reported to the IACUC
- Last Mtg = shows the last meeting this event or review was submitted to

You can click on the blue event link in this section to view the event details.

3.5.1 Event Details

Once you have clicked on the blue event link in the study (protocol) page, you will be taken to the event details.

Event Details: Initial Submission - IACUC on 2018-046-OFF						Help	Settings	Sign off
Study-Site								
Study:	2018-046-OFF			Site:	OFF - Off campus			
Title:	TEST			Committee:	IACUC			
PI:				Sponsor Id				
Event								
Type:	Initial Submission - IACUC			Started:	12/10/2018			
Instance:				Completed:				
Committee:	Inherited from Study							
Acknowledge/Approval/Determination Date:								
Steps (7)								<input checked="" type="checkbox"/> Hide Skipped
Step	Planned	Actual	Complete	Minutes	Micro Note			
Received Initial Application Form		12/10/2018	Yes					
Send for Full Committee Review		12/10/2018	Yes					
Received Full Committee Review Comments		12/10/2018	Yes					
Full Committee Review	12/10/2018		No					
Notify PI of results		12/12/2018	Yes					
Disburse Approval Letter		12/12/2018	Yes					

- “Study-Site” = shows basic study information, including study (protocol) number, title, name of principal investigator, etc.
- “Event” = shows specific details about the submission you are viewing.
- “Notes” = lists the summary of communication on the study, including any notes from IACUC to the research team and emails between IACUC and the research team that were sent within the IRBManager system.
Note: This section may be empty for many studies, and therefore not displayed.
- “Steps” = shows the steps of the event’s submission and review with the corresponding dates. Each event will have the steps listed with a planned date, actual date, and when (if applicable) it will go to the full committee for review.

3.5.2 Actions in Event Details

In the event details screen, Actions on the left sidebar are available as follows:

Actions
Attachments (3)
Send EMail
Start xForm
xForms (1)
Done

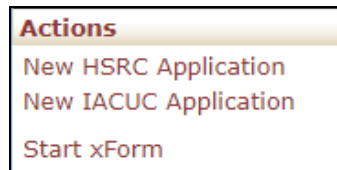
- “Attachments (___)” = These are the attachments uploaded by the PI for this event. This may include SOPs, wildlife permits, or other documents provided for this submission. PIs should not upload new attachments into this section, as they will not be viewable to the IACUC.
- “Send Email” = PIs may send emails from within the event page.
- “Start xForm” = Not currently in use within an event page. See Section 5.0 for information on starting new xForms.
- “xForms” = Shows all study (protocol) submission forms associated with the event.



4.0 xForms (Study [Protocol] Submission Forms)

4.1 How to Open an xForm


4.1.1 Opening xForm for a New Study (Initial Protocol Submission Form)

On the left side of the Dashboard, select the relevant application under the Actions menu. You can select “New IACUC Application” directly, or you can select “Start xForm,” which will open a new screen with a list of all the study (protocol) application forms available and a description of each xForm. Click on the name of the xForm you wish to complete.



Select xForm to start		
Action	Form (Click to start)	Description
	HSRC Application	Initial HSRC Application (exempt and non-exempt research)
	IACUC Application	IACUC Application

Note: Only certain xForms are available from the Dashboard (i.e. new IACUC application forms). xForms that can be completed only after a study is approved (such as an Amendment [Modification], Annual Review, or Final Report form) are not available from the Dashboard; these must be opened from within a study (Section 6.1.2 below).


As described in more detail in Section 6.4, these xForms use smart logic to guide the user through a series of questions. Depending upon the responses provided, additional questions may or may not appear. If you wish to see the entire xForm (i.e., all questions, regardless of the user’s responses), this can be done by clicking the Print icon  under the Action column to the left of the xForm name.


4.1.2 Opening xForm for an Existing/Approved Study (Amendment [modification], Annual Review, Final Report)

In order to complete an event (submission) for an active/approved study, such as an Amendment (Modification), Annual Review, or Final Report, you must first go to the active/approved study page. For Annual Reviews and Final Reports, you should receive a reminder email 30 days before the due dates for those submissions providing a link directly to the study page. Otherwise, active/approved studies can be accessed by clicking on the corresponding blue study link in the “My Studies” section on the bottom of the Dashboard (see Section 3.2.4).

To complete an **Amendment (Modification) Form**:

1. Under the “Reference xForms” header on the study protocol page, click on the

“Copy for Amend” icon  under the “Action” header corresponding with the IACUC Application that you wish to modify.

▼ Reference xForms (1)	
Action	Form
	IACUC Application



2. Clicking this icon will create a copy of the most recent version (including previous amendments) of your IACUC study (protocol) and will allow you to submit requests for modifications to your study. Select all the modifications/amendments that apply, as shown below.

Select all of the following that apply: *(Required)*

- Change in Personnel
- Change in Duration of Study
- Change in Protocol Title
- Changes to Scientific Objectives or Methods
- Changes to species and/or number of animals to be used
- Other

To complete an **Annual Review** or **Final Report Form**:

1. Once you are in the study (protocol) page, click the “Start xForm” button under the Action menu in the left sidebar. This will open a new screen with a list of all of the application forms available and a description of each xForm. Click on the name of the xForm you wish to complete, as shown below.

Select xForm to start		
Action	Form (Click to start)	Description
	IACUC Annual Renewal (Draft)	IACUC Annual Renewal
	IACUC Final Report (Draft)	IACUC Final Report

4.1.3 Opening an Existing Unsubmitted xForm

To return to an xForm you previously began for a study (protocol), but did not yet submit, you can access the xForm via one of two methods:

1. The “__xForms” link under the “My Documents and Forms” menu on the left sidebar of the Dashboard (see Section 3.1.3)
2. The “You have __ unsubmitted xForms” link from the “xForms” section in the middle of the Dashboard (see Section 3.2.2)

Click on the form name to open the xForm and continue entering your study information for submission.

4.2 Completing an xForm

4.2.1 General Instructions

xForms use smart logic to guide the user through a series of questions. Depending upon the responses provided, additional questions may appear. For example, if you answer that your study is funded, subsequent questions will prompt you to describe

the funding source. If you indicate that you do not have funding related to the study, those subsequent questions asking about funding details will be hidden.

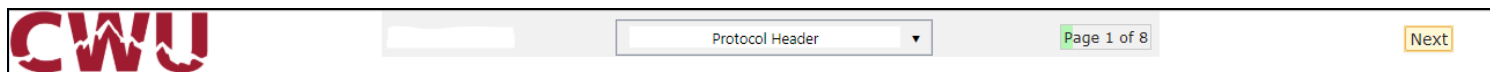
The majority of questions in the xForms require a response; however, some may be optional. IRBManager will not allow the user to submit the xForm until all required responses have been completed.

Note that some information in the xForm may be automatically generated. For example, when completing an Annual Review form, the system will automatically populate the study details (such as project title, name of PI, etc.) on the top of the xForm.

Please carefully read all instructions provided on the xForm and answer all required questions.

4.2.2 Navigation Bar at the Top of Each xForm Page

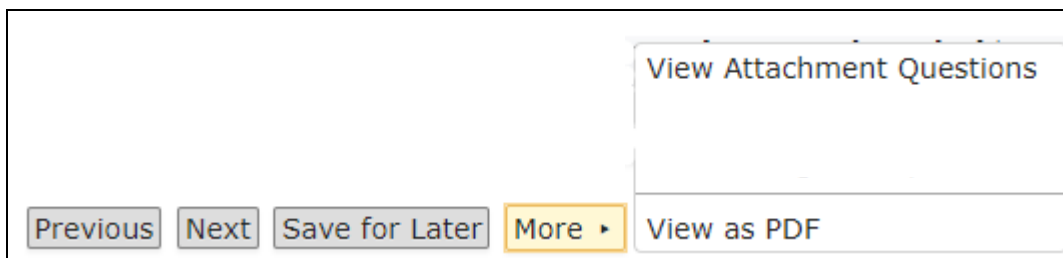
The top of each xForm page will contain a header that looks as follows:



- Page Titles Drop-down menu = Allows you to “jump” between pages of an xForm before completing all required questions on a page. Note that depending on the responses to the questions in an xForm, entire pages of questions may not be required. Therefore, there may be some pages that are not listed in the drop-down menu.
- Page Numbers = Shows “Page ___ of ___” on each page of the xForm. The number of pages on the xForm may fluctuate due to new pages being opened up as a result of your answers to questions on the xForm.
- Next Button = Saves your progress on the current page and takes you to the next page in the xForm.

4.2.3 Navigation Buttons at the Bottom of Each xForm Page

The bottom of each xForm page will contain a footer that looks as follows:



- Previous = Saves your progress on the current page and takes you to the previous page in the xForm.
- Next = Saves your progress on the current page and takes you to the next page in the xForm.
- Save for Later = Saves your current progress and prompts you to exit or go

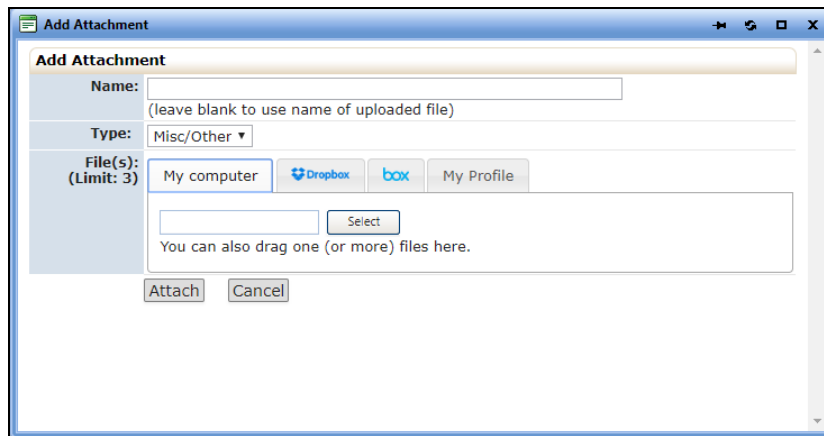
back to the last page you were working on.

- View Attachment Questions = Shows only the questions in the xForm that have “Add Attachment” buttons.
- View as PDF = Allows you to print/convert/save the xForm as a PDF file.
Note: Clicking “PDF” does not save the changes that you make to the xForm. To save changes to the xForm, you must click “Next” or “Save for Later” before signing out of IRBManager.

4.2.4 Attaching Documents

Attachments can be added to xForms wherever an “Add Attachment” button is found. Documents to be attached will depend on the xForm being submitted (SOPs, permits, etc.).


Add Attachment

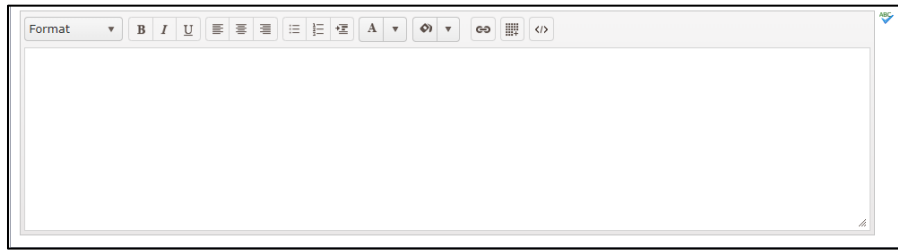


To attach a document to an xForm:

1. Click “Add Attachment.”
2. Enter the name for your attachment. (Optional. If left blank, the system will use the file name.)
3. Select the type of attachment in the drop-down list. (On some questions, the type is pre-set with only one option.)
4. Select the appropriate tab option to insert your attachment:
 - “My computer” = You make click “Select” to browse your computer files for the document, or you may drag and drop your files directly into the tab
 - “Dropbox” = Choose the relevant attachment from within Dropbox.
 - “box” = Choose the relevant attachment from within Dropbox.
 - “My Profile” = If you have already uploaded the relevant attachment into your IRBManager profile (See Section 3.1.3).
5. Click “Attach” to finish the process.

4.2.5 Features for Entering Bodies of Text

For some questions in an xForm, your responses may consist of full paragraphs. In these cases, you will have the option to format your text to your preference. You can also hit the spell check icon  on the far right of the text box to check your spelling.



4.2.6 Signatures

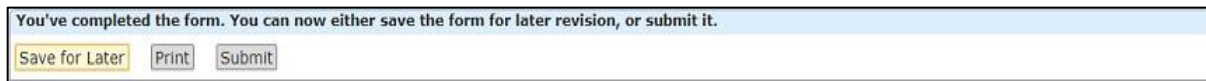
Most xForms require the submitter to electronically sign the xForm and attest to the accuracy of the information provided within the xForm, as well as other compliance stipulations. This electronic signature is equivalent to a paper signature.

CWU-affiliated users: Click the “Sign” box. This will bring up a pop-up window for you to enter your CWU credentials (email and network password).

Externally-affiliated users: Enter your IRBManager password in the signature box.

4.3 Submitting an xForm

Once all of the required questions have been answered and the xForm has been signed, IRBManager will allow you to advance to the submission screen.



You may either save the xForm for later, print the xForm, submit the xForm, or press the browser’s back button to return to the previous page in the xForm.

You must click the “Submit” button to advance the xForm to the next person/office in the review process. The xForm will automatically route to the next person who is required to review and sign the xForm—you do not need to specifically add anyone to the xForm. If you choose any other action than “Submit,” the xForm will remain in your list of unsubmitted xForms and will not reach IACUC for review.

Note: Clicking “Submit” is equivalent to routing the paper version of the xForm for signatures. Once “Submit” is pressed, you will not have the opportunity to make any changes to the xForm unless it gets returned to you by someone who has reviewed it (e.g., faculty supervisor, IACUC administrator, etc.).

If an xForm is submitted by someone other than the PI, the xForm will be routed to the PI. Only the PI can submit the xForm and forward to the next person in the review process.

Once the xForm has been submitted to IACUC (after PI submission and authorizing officials approval), IRBManager will automatically assign a study event on the protocol page (see Section 4.5). You can then click on the event name (blue link) to track the event progress.

5.0 Faculty Supervisor Review

If a student is listed as the Principal Investigator (PI) for an IACUC study (protocol), that study (protocol) will go to a faculty supervisor for review before being submitted to the IACUC. The following xForms require faculty supervisor review:

- Initial IACUC Application xForm
- IACUC Amendment (Modification) xForm
- IACUC Annual Review xForm
- IACUC Final Report xForm

Student PIs will list their faculty supervisor in their application and faculty supervisors will be automatically notified by IRBManager via email when a PI has submitted a protocol for review.

5.1 Faculty Supervisor Access to Study (Protocol)

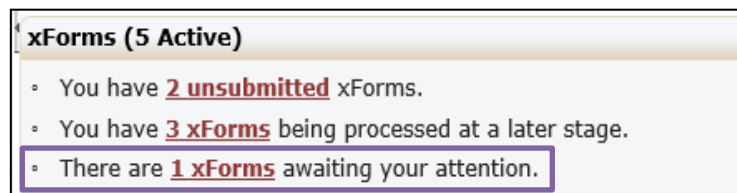
Faculty supervisors can access the study (protocol) via one of two methods.

5.1.1 Via Email

The faculty supervisor will receive an email notification with a link that can take them directly to the student's study (protocol) application xForm. (They will be prompted to enter their CWU credentials upon clicking the link.)

5.1.2 Via Dashboard

Alternatively, the faculty supervisor can access the study (protocol) from the xForms section in the middle of their Dashboard, by clicking the link in "There are __ xForms awaiting your attention" (see Section 3.2.2).



Clicking on the red underlined link will open a screen with all xForms awaiting attention by the faculty supervisor.

Form	Identifier	Owner	Stage	Status	Started	Requires Approval
HRRC New Protocol Submission Form [Human Subjects Research]	Researcher, Test Ph.D.	Researcher, Test Ph.D.	AO Approval	Work in progress	24 minutes ago	No

To open the xForm, click on the blue xForm name.

5.2 Study (Protocol) Review

5.2.1 Reading the PI's protocol

Upon clicking open the xForm, the faculty supervisor will see the entire xForm as submitted by the PI. To review the study (protocol), simply scroll through the page. Additional features to aid in the review process:

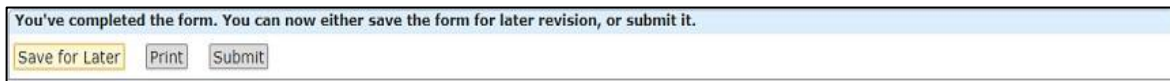
- “Hide Help Text” = This hides the xForm instructions the PI viewed when filling out the xForm. When this is checked, all responses from the PI will still be visible.
- Page Name Drop-Down menu at top of page = Use this to jump to a particular section of the xForm.

5.2.2 Completing the Faculty Supervisor Review

Once you have finished reading the study (protocol), click “Next” either at the top of the page or at the very bottom of the page. This will take you to the faculty supervisor review page.

If you approve the study (protocol):

1. Answer “yes” to the question asking if the protocol is ready for submission to IACUC.
2. Read the faculty supervisor attestation and electronically sign the xForm by clicking the “Sign” box and entering your CWU credentials (email address and password).
3. Click “Next” to take you to the submission page.
4. Click “Submit.”



Note: You must click “Submit” for the xForm to be routed to IACUC for processing.

If you require changes to the study (protocol):

1. Answer “no” to the question asking if the study (protocol) is ready for submission to IACUC.
2. Enter the changes you want the PI to make in the text box. All text entered in this text box will be sent to the PI via email.
3. Click “Next” to take you to the submission page.
4. Click “Submit” to route the xForm back to the PI.
5. The PI will receive an email indicating you require changes. Once the PI has made the changes, the xForm will be routed back to the faculty supervisor again for approval.

5.3 Post-Faculty Supervisor Approval

For all xForms requiring faculty supervisor approval, the faculty supervisor will be copied on all emails from IACUC to the PI, including final decision notifications.

Note: If IACUC needs to return the xForm to the PI for any reason, the faculty supervisor approval process will need to be repeated upon re-submission of the xForm by the PI.

6.0 Help and Support

If you have any questions or problems using IRBManager, please contact the IACUC administrator at (509) 963-3111 or iacuc@cwu.edu.