

IRBNet User Guide

For IRB, IACUC, and IBC

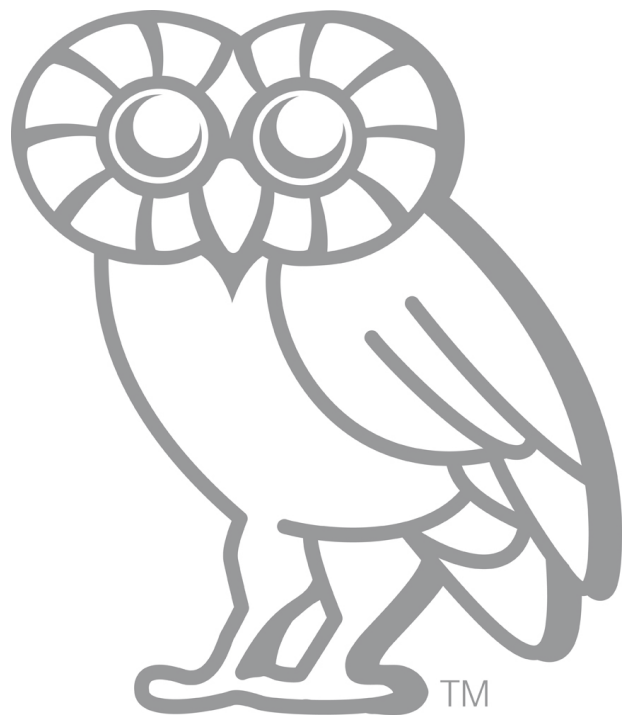


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Introduction

The purpose of this user guide is to educate Rice University faculty, staff and students engaging in research on how to create, complete and submit research protocol and registration applications electronically through the IRBNet system to the Rice University Office of Research Compliance for review and approval by the respective compliance committees including, Institutional Review Board (IRB), Institutional Animal Care and Use Committee (IACUC) as well as the Institutional Biosafety Committee (IBC).

What is IRBNet?

IRBNet is a secure web-based application that offers a robust set of electronic tools supporting the management, submission, review and oversight of our research protocols. Some of IRBNet's many features include electronic document management, web-based protocol sharing and collaboration, automatic notifications, electronic submissions and reviews, integrated training and credential management, and important audit capabilities including electronic revision histories, electronic signatures and event tracking. You may access IRBNet from virtually any computer using a web browser by visiting www.irbnet.org.

IRBNet Resources

Helpful Websites

- Rice University IRBNet Blog: <http://irbnet.rice.edu>
- Rice University Office of Research Compliance: <http://comp.rice.edu>
- IRBNet Resources Page: <http://irbnetresources.org> (ID: rice / Password: training)

Key Contact Information

Questions regarding Research Compliance Policies & Procedures

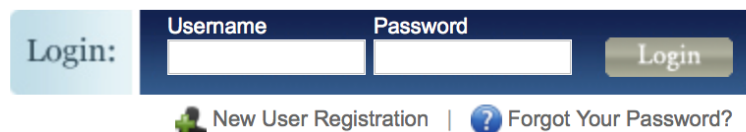
- IACUC/IBC Compliance Administrator: Michele Pratt (mpratt@rice.edu or 713-348-6202)
- IRB Compliance Administrator: Stephanie Thomas (irb-io@rice.edu or 713-348-3586)

Question regarding IRBNet functionalities and issues with navigation

- ERA Training Specialist: Hope Grant (era@rice.edu or 713-348-3801)
- ERA Administrator: Elle Ristow (era@rice.edu or 713-348-3329)

IRBNet User Registration

1. To register with IRBNet, go to www.irbnet.org
2. Click on the “New User Registration” link on the top right corner of the browser below the login box.
(**NOTE:** If you are a committee member, please check with your Compliance Administrator before you create a new user profile. All members’ profiles were pre-loaded by IRBNet.)



3. This action will open the **New User Account Information**. Complete all required fields on the IRBNet registration page and continue. (**NOTE:** Please feel free to use your net ID as Username, however, we strongly discourage to use the same password for security purposes.)
4. Next you will need to read and accept the “IRBNet Individual User Terms of Use” to continue your registration.
5. In the “Add Affiliation” section (next to “Organization types to display”), type in “Rice University” in the box and search. Make sure “Research Institution” is checked.
6. Select “Rice University, Houston, TX” and continue.
7. Next you will see **Your Contact Information** screen. Complete your contact information and continue.
8. Review your profile information for accuracy. If any changes need to be made, click “Edit” and make appropriate changes.
9. Once all information is accurate, click “Register”
10. An activation email will be sent to the email that you provided. You must click on the activation link in that email in order to complete the registration. Please note that it can take up to a couple of hours depending on institution’s firewall setting.

Training and Credentials

Please note that all PIs, Co-PIs, and any personnel who conduct research involving human subjects or animal subjects must be CITI certified. CITI training is also required for IBC registrations designated as RG2 or BSL2, and it is recommended for all other designations.

If you or any of your study personnel have not completed CITI training, you can do so by following this link: www.citiprogram.org and completing the appropriate CITI training depending on your scientific discipline and the research performed in your lab. For more information about the necessary CITI training, please feel free to review the Office of Research Compliance requirements for the respective committee. After completing the required CITI training, please save a copy of your completion report for your records.

It will be necessary to either save the CITI completion reports for all project personnel or each user will need to link their CITI Training to their User Profile in IRBNet so training for all personnel can be linked to each project package.

To submit documentation of CITI training in to IRBNet:

1. Click on “User Profile” at the top of the screen.
2. Under “Training and Credentials” select “Add an External Account.”
3. Follow the instructions on the screen to link your CITI Training to your IRBNet Profile by entering your CITI ID and verifying the information.
4. To attach other training and credentials such as training provided, upload the file containing the appropriate documentation (e.g. EHS or Lab Safety Training). Click “Submit”.

External Accounts

You can add your accounts from other organizations such as CITI to your IRBNet profile. Once you add an external account to your IRBNet profile, then external information such as training records can be automatically available to you in IRBNet. | [Learn More](#) |

[▶ Add an External Account](#)

Account Type	Account ID	Status	
CITI Training Program	458641	Un-verified	

Training & Credentials

IRBNet allows you to track and share your training records, certifications, resumes and other personal credentials. Once added to your profile, your training and credentials can be easily linked to your projects from the Designer, are accessible by your project teams and can be quickly accessed and tracked by the boards that review your projects. Some boards also permit you to directly submit your training and credentials without requiring you to link these records to specific projects.

[▶ Add a New Training & Credentials Record](#)

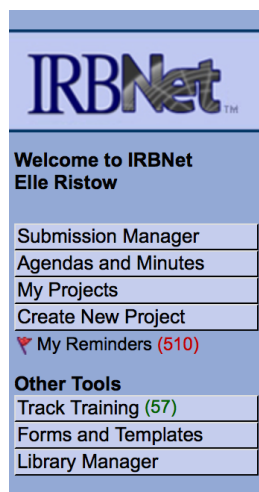
| [Show all Versions](#) |

	Doc ID	Document Type	Description	Cr	Effective Date	Expiration Date	Last Modified	Status	
	19001.1	IACUC Training - CITI	CITI Training		01/01/2014	12/31/2016	11/26/2013 10:09 AM	Accepted	

| [Submit](#) |

New User Overview

After logging into IRBNet, you will reach **My Projects** page. **My Projects** screen is the landing page for Researchers. This is where you see all the current study projects that you have created or that have been shared with you. You can always sort the list by clicking the heading.



The left hand navigation pane is where you can begin any action such as creating a new project, reviewing your current reminders, or access any forms and templates you may need to complete the project application.

Depending on your role such as Researcher, Committee Member/Reviewer, Administrator, this navigation pane will look different. If you are a researcher, you must see two items: My Projects and Create New Project. You will also see Forms and Templates under “Other Tools” section. If you are a researcher but do not see these items, please contact ERA Help Desk at era@rice.edu. We will work with you to add an appropriate affiliation as a researcher.

Creating a New Project

1. Click on the “Create New Project” button from the navigation pane. This will take you to the **Project Information** screen where you will be asked to enter basic information.

Project Information

Create a New Project

To create a new project, first provide the basic project information below. Once your project is created you may attach project documentation and share the project with other users.

Research Institution:

Title: *

Local Principal Investigator:

First Name: *

Last Name: * **Degree(s):**

Keywords:

Sponsor:

Internal Reference Number:

You may specify an internal account number, billing identifier or reference number for this project.

* required fields

2. Enter the Project Title.
3. Enter the legal first and last name of the Principal Investigator. (**NOTE:** Principal Investigator is the individual who will be responsible for the conduct of the project. If project paperwork is being completed by someone other than the PI (e.g., research coordinator or graduate student), be sure to "share" the package with the PI so that both parties have full access. Only packages that have been signed by the Principal Investigator will be considered for review. For student projects, theses and dissertations, a faculty advisor must be listed as the PI on the submission.)
4. Enter Keywords (optional) that can be used in a search to find this project.
5. If your project is externally funded, please enter the sponsor's name. Otherwise, leave it blank.
6. Please leave the "Internal Reference Number" box blank.
7. Click continue then you will be taken to the **Designer** screen for this project. This is where you will be able to download instructions, templates and attach the various files associated with the current project package.

The screenshot shows the IRBNet interface. At the top, it says "IRBNet ID: 52912-1" and has links for "USER PROFILE" and "LOGOUT". Below this is a banner with the IRBNet logo and a collage of images. On the left is a sidebar with navigation links: "Welcome to IRBNet Hannah Researcher", "My Projects", "Create New Project", "My Reminders (21)", "Project Administration" (with sub-links: Project Overview, Designer, Share this Project, Sign this Package, Submit this Package, Delete this Package, Send Project Mail, Project History), "Messages & Alerts", "Other Tools", and "Forms and Templates". The main content area is titled "Designer" and shows "[52912-1] Test Project for IRBNet User Manual". It contains two steps: "Step 1: Download blank forms, document templates and reference materials to assist you in assembling your document package." with dropdowns for "Select a Library" (Rice University IRB, Houston, TX) and "Select a Document" (- Guidelines for submitting a research), and "Step 2: Assemble your document package. In addition to adding project documents to your package, IRBNet also allows you to link your project team's Training & Credentials to your package." Below Step 2, it says "Documents in this Package:" followed by "There are currently no documents in this package." At the bottom, it says "There are no Training & Credentials records linked to this package." with a link "Link / Un-Link Training Records" and an "Add New Document" button.

8. You can download blank forms and templates as well as README (brief instruction) from Step 1. Click "Add New Document" under Step 2.
9. This is where you can upload any supplemental documents that are related to this project. In order to create a new project application, click On-Line Document list and select the correct one, then "Add".
10. You will be prompted with two options - Create a new one from scratch or Clone one of my existing. Select "Create a new wizard from scratch" for now.
11. From here, you will need to answer all the appropriate questions in order to complete this application. When you arrive at the page that says "Form Complete", take note of the supplements that you will be required to fill out (if applicable) before submitting your application.

12. You can preview the attachment before saving and exiting by clicking on "Preview".
13. When you are ready to save the document, click "Save & Exit" and your document will be saved and automatically attached to your project, then you will be taken to the **Designer** page.

IRBNet ID: 52912-1 USER PROFILE LOGOUT

IRBNet

Welcome to IRBNet
Hannah Researcher

Designer

[52912-1] Test Project for IRBNet User Manual

Step 1:
Download blank forms, document templates and reference materials to assist you in assembling your document package.

Select a Library: Rice University IBC, Houston, TX

Select a Document: IBC Appendix A - List of host vector system Download

Step 2:
Assemble your document package. In addition to adding project documents to your package, IRBNet also allows you to link your project team's Training & Credentials to your package.

Documents in this Package:

Document Type	Description	Last Modified
Rice University - IACUC/IBC Application Form (incomplete)	Rice University - IACUC/IBC Application Form	10/10/2014 12:20 PM

There are no Training & Credentials records linked to this package. | [Link / Un-Link Training Records](#) |

Add New Document

14. If you are required to attach any additional documents such as Appendix, sample consent, and supplements, click on "Select a Library" list under Step 1 and choose the appropriate committee. You will be able to download blank forms, and "Add New Document" when you are ready to upload the completed form.

IRBNet ID: 52912-1 USER PROFILE LOGOUT

IRBNet

Welcome to IRBNet
Hannah Researcher

Attach Document

[52912-1] Test Project for IRBNet User Manual

You may attach documents to this package by clicking the "Browse..." button to locate a document and then by clicking "Attach". The "Document Type" and optional "Description" are informational fields to assist you in managing your attached documents.

Document Type *

Description

File * Choose File no file selected

Attach Cancel

* required fields

You may also use the Document Wizards to create documents on-line. Documents that you create on-line are automatically attached in PDF format.

On-Line Document

Add Cancel

15. You will then see the **Attach Document** page, where you will select an “Document Type” from the drop down menu.
16. Click “Browse” to locate the document that you plan to attach, then click “Attach”.
17. Your document is now attached to the project package. Repeat steps for each item you wish to attach such as forms you have completed, copy of your grant if receiving funding, consent forms, supplements, external institutional approval, and etc.

Submitting your Project

Share your Project

1. Before you submit your project, share your project if:
 - (a) you are a student. You must share the project with your faculty advisor so that s/he can certify the project.
 - (b) you are completing the application on behalf of the PI. You must share the project with the PI so s/he can certify the project.
 - (c) you have additional key personnel such as Co-PI, Research Assistants, or other project related staff.
2. Click “Share this project” on the navigation pane on the left.
3. Click “Share”, select the institution the individual is affiliated with, and click “Select Organization”.

IRBNet ID: 571216-1
USER PROFILE LOGOUT

Welcome to IRBNet
Elle Ristow

- Submission Manager
- Agendas and Minutes
- My Projects
- Create New Project
- My Reminders (514)

Project Administration

- Project Overview
- Designer
- Share this Project
- Sign this Package
- Submit this Package
- Delete this Package
- Send Project Mail
- Reviews
- Project History
- Messages & Alerts (1)

Other Tools

- Track Training (48)
- Forms and Templates
- Library Manager

[571216-1] IBC Registration

You may share this project with other Researchers, Committee Members, Administrators and Sponsors. You may also send a complete copy of this project to a Principal Investigator at another site if this is a multi-site project. You may also transfer ownership of this project to another individual.

- Share:** Use this option if you wish to share your project with other Researchers, Committee Members, Administrators or Sponsors at your own institution or any other institution. For example, you may wish to share this project with other members of your research team so that you may collaborate in the design and development of the project, or with a selected Committee Member or Administrator to solicit feedback prior to submitting your project for review. You may provide any individual with **Full**, **Write** or **Read** access.
- Multi-site:** Use this option only if your project is a multi-site project and you wish to send a complete and independent copy of this project to a Principal Investigator at another site. The local Principal Investigator will be able to obtain project documents from the lead site and may modify their copy of these documents (such as consent forms) to meet the requirements of their local Board. You will be able to monitor the progress of this project at every local site. The other local Principal Investigators will also be able to monitor the progress of this project at every local site (including your own).
- Transfer:** Transfer your ownership of this project to another user. In doing so you will relinquish all access to this project and the designated user will be granted **Full** access.

User Name	Organization	Access Type
Yizhi Tao	Rice University, Houston, TX	Full
Michele Pratt	Rice University, Houston, TX	Full

4. Locate the individual by entering their last name, then click “Search”. Select the appropriate personnel from the list.

IRBNet ID: 571216-1 USER PROFILE LOGOUT

Welcome to IRBNet
Elle Ristow **Share Project**

[571216-1] IBC Registration

Specify the access that you wish to grant to each user at **Rice University**. You should grant each user only the minimum level of access necessary to perform their work on this project.

- **Signature Only (Read):** Users whose only role is to sign off on project documentation should be granted "Read" access. Users with Read access can view project documentation, communicate with the project team and add their signature. This would typically include advisors, department heads, and other individuals who are required to sign off on the project documentation prior to submission but do not otherwise have a day-to-day role on the project.
- **Read:** Users that are granted "Read" access can view project documentation, collaborate with other users and add their signature, but may not edit project documents or perform any other administrative functions.
- **Write:** Users that are granted "Write" access can view and edit project documents, collaborate with other users and add their signature, but may not grant access to other users, submit packages for review or perform any other administrative functions.
- **Full:** Users that are granted "Full" access can perform all functions without restriction. This includes editing project documents, sharing the project with other users, submitting document packages for review and deleting document packages. Only Project Owners with day-to-day responsibility for the project should be granted Full access. Users with Full access will receive automatic email copies of all project notifications and alerts that are sent to the Project Owners.

Search for a User:

NOTE: You can also share your project with the compliance administrator if you want her/him to assist with your application. Please contact your administrator first before you share it with them.

Sign your Package

1. Packages must be signed by all Faculty Advisors and Principal Investigators. Select “Sign this Package” from the navigation pane on the left.
2. Select your role in this project from the drop-down menu, then click “Sign”.
3. You will be required to log in again for security purposes. Enter your username and password then click “Continue”.

Submit your Package

1. When your project package is completely reviewed and signed by all the appropriate personnel, select “Submit this Package” on the navigation pane on the left.
2. Select the correct Board that you are submitting your project to, then continue.
3. Select the correct “Submission Type”, make comments if necessary then click “Submit”.
4. Congratulations! You just submitted your project to the Board.

Managing Your Projects

Submitting a Continuing Review

To submit a study for continuing review, you must first open the study. Please keep in mind that you do not want to create a new project. The submission of a continuing review of an existing project requires creating of a package in a project.












1. Login to IRBNet. If you are a researcher, you will land on **My Projects** page. This is where all of the projects that you have access to will be housed.
2. Click on the title of the project you would like to continue/review.
3. Click “Project History” from the navigation pane on the left.
4. Click “Create New Package” button and then you will be in **Project Overview** page of the new package that you just created.
5. Click “Designer” button from the navigation pane. You will notice that you can either revise your existing project documents and maintain version history, or add entirely new documents to your package. Click “Learn More” to see detailed explanation of each option.

IRBNet allows you to revise your existing project documents and maintain version history, or add entirely new documents to your package. [Learn more.](#)

[Add New Document](#) [\(When should I do this?\)](#)

OR

Documents from Previous Packages that you can Revise: [\(When should I do this?\)](#)

Pkg #	Document Type	Description	Last Modified	Pkg Submission Date	
3	Continuing Review/Progress Report	IRB Annual Review	06/25/2014 12:29 PM	06/25/2014	 
3	Rice University - IRB Core Data Form	Rice University - IRB Core Data Form	06/25/2014 12:28 PM	06/25/2014	  
1	Consent Form	Informed Consent	06/25/2014 11:57 AM	06/25/2014	 
1	HIPAA Waiver	HIPPA	06/25/2014 11:59 AM	06/25/2014	 
1	Questionnaire/Survey	Interview Questions	06/25/2014 12:12 PM	06/25/2014	 

6. When you are finished with attaching all the proper documents for this continuing review, repeat **Submitting your Project** section to complete.

Submitting a Modification

If you have submitted a project and the Committee deemed that “Modifications are Required”, you need to submit a modification. Please keep in mind that you do not want to create a new project. The submission of a modification of an existing project requires creating of a package in a project.

1. Login to IRBNet. If you are a researcher, you will land on **My Projects** page. This is where all of the projects that you have access to will be housed.
2. Click on the title of the project you would like to modify.

3. Click “Project History” from the navigation pane on the left.
4. Click “Create New Package” button and then you will be in **Project Overview** page of the new package that you just created.
5. Click “Designer” button from the navigation pane. You will notice that all the forms and documents that you attached in the previous submission are already available in this new package. Please add, delete, or edit any of them for the continuing review submission. Please make sure that the application form is updated to reflect all requested modification or revisions. Failure to do so will result in delay in review process.
6. When you are finished with attaching all the proper documents for this continuing review, repeat ***Submitting your Project*** section to complete.

IRBNet Icons



Package is locked and is in the hands of the compliance office



Package is un-locked pending changes by PI



Package has been re-locked by the PI and is pending review by the compliance office



Edit or Replace a document



View a Document



Delete



You have pending project reminders



Required Field