

HOW TO CREATE AN IBC PROTOCOL XFORM

This short tutorial provides information on how to create an IBC Protocol XForm in IRB Manager. Let's look at the Dashboard after our investigator John PI has logged in.

The screenshot shows the IRB Manager dashboard for The University of Toledo. The top navigation bar includes 'Home', 'My IBC', and search options. The main content area is divided into several sections:

- Actions for Researchers:** Start xForm, Show Sponsor Ids.
- Recent Items:** A list of study IDs (e.g., 500007-UT, 500010-UT).
- Useful Links:** All Projects Dashboard, IACUC Dashboard, IBC Dashboard (coming soon), IRB Dashboard.
- My Docs & xForms:** 4 Attachments, 96 xForms.
- Studies (6 Active):** Summary statistics: 6 active studies, 12 total studies; 6 active and 12 total studies as PI; 2 unsubmitted xForms; 8 xForms being processed; 1 xForm in error.
- xForms (10 Active):** Summary statistics: 2 unsubmitted xForms; 8 xForms being processed; 1 xForm in error.
- Events (10 Open):** Summary statistics: 1 IBC Amendment Submission event; 6 IBC New Submission events; 3 IBC Renewal Submission events; 10 Total Open events.
- My Studies (6 Active):** A table listing active studies with columns for Study, Site, PI, Title, Expires, Status, and Reference Doc(s).
- Important Information:** IBC coming in 2020!!!

Study	Site	PI	Title	Expires	Status	Reference Doc(s)
500002-UT	University of Toledo	PI, John M.D.	Testing DMR	02/23/2025	Approved	
500004-UT	University of Toledo	PI, John M.D.	Common Scenario 2 - Renewal	10/04/2020	Approved	
500005-UT	University of Toledo	PI, John M.D.	Testing FCR DE->MODS->APPROVE	09/04/2020	Approved	
500007-UT	University of Toledo	PI, John M.D.	Most Complex DMR - Renewal	08/05/2020	Approved	

On the upper left hand side you will see an Action called Start XForm. If you click here, it will display a list of XForms from which you can choose to create. In this case, we will choose to create an IBC Protocol Form. The IBC Protocol XForm is organized into different sections or pages.

The screenshot shows the 'A. Initial Demographics' page of the IBC Protocol XForm. The page title is 'IACUC Animal Use Protocol Form -- A. Initial Demographics'. A red warning message states: 'PLEASE NOTE: THIS IS STILL THE TESTING PHASE!!!! All xForms started prior to go-live will be deleted!!!! DO NOT PUT REAL APPLICATIONS HERE YET'. The form includes a 'Collaborators' link, a 'Drop down' menu, and a 'Next' button. The 'Submitter' section shows 'PI, John M.D.' with email 'john.pi@utoledo.edu' and business phone '419-530-6651'. The 'A.1. What is the title of your project?' section has a text input field and an 'Add Note' button. The 'A.2. Please indicate the protocol type for your application' section has radio buttons for 'Breeding' and 'Classroom Instruction'.

You may answer them sequentially or use the drop down list to skip to different section or pages of the XForm. Each question has an "Add Note" feature. This allows the individual filling out the XForm, perhaps a Lab Manager, to add a note or question for the principal investigator or the IACUC Office. By pressing the "Collaborators" link, you can add individuals that will be able to view, edit, and/or submit the XForm or protocol as well. At the bottom of each page are directional buttons that allow you to move to the previous or next pages or sections, save the XForm for later, and a more button. If you press the more button you are given various options including the options to view the XForm as a pdf, which will allow you to print it for later use.



IACUC Animal Use Protocol Form -- A. Initial Demographics

- Monitoring
- Research
- Research/Breeding
- Training

A.3. Please indicate species involved in your protocol (one per protocol). (Required)

[Add Note](#) [View Audit](#)

A.4. Is this a renewal application? (Required)

[Add Note](#) [View Audit](#)

- Yes
- No

[Next](#) [Save for Later](#) [More >](#)