

HOW TO RENEW A PROTOCOL IN IRB MANAGER

This short handout provides information on how to renew a protocol 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 John M.D. at the University of Toledo. The dashboard is divided into several sections:

- Actions for Researchers:** Animal Use Protocol Form, Start xForm, Show Sponsor Ids.
- Recent Items:** 300018-UT, 400025-UT, 400030-UT, 400006-UT, 400001-UT, TEST-IACUC-3-UT, TEST-IACUC-2-UT.
- Useful Links:** All Projects Dashboard, IACUC Dashboard (coming soon), IBC Dashboard (coming soon), IRB Dashboard.
- Studies (20 Active):** You are associated with 20 active Studies and 34 total Studies. You are the PI for 20 active and 34 total Studies. There are 8 studies expiring in the next 90 days. The next study to expire is 400004-UT.
- xForms (22 Active):** You have 8 unsubmitted xForms. You have 14 xForms being processed at a later stage. There are 3 xForms awaiting your attention.
- Events (15 Open):** Only show events where I am: [dropdown]. You have 2 IACUC Amendment Submission events. You have 13 IACUC New/Triennial Renewal Submission events. You have 15 Total Open events.
- Important Information:** Welcome to the new home of IACUC Research. IACUC research is open for testing and training. **IMPORTANT NOTE:** Do not put real Protocol applications here yet. All data entered will be wiped before the go-live on Monday February 24th at 5:00PM. For help with the transition or for question about a specific protocol, contact the IACUC office. For questions about the system email Jamie.Vannatta@utoledo.edu or call 419-530-6651.

Scroll to the bottom of the dashboard for a list of your currently active studies.

1. Open the study you are looking at copying by clicking the study # link.
2. Scroll to the section of the study labeled "Reference XForms"
3. If you have this section on your study, click on the Copy Action (which looks like a stack of papers) next to the IACUC Animal Use Protocol Form.

The screenshot shows the details for Study 400004-UT (IACUC). The page includes the following information:

- Study-Site:** Site(s): UT - University of Toledo, PI: PI, John M.D., Status: Approved, Additional: N, Approval: November 20, 2019, Expiration: January 7, 2020, Initial Approval: November 20, 2019, Other Expirations: Standard 3-Yr Expiration Date (IACUC) - 01/06/2020.
- Study-Site Contacts (2):** CoInvestigator, Joe (Research Assistant), Student, Jane (Research Assistant).
- Reference xForms (1):** A table with columns: Action, Form, Identifier, Stage, As Of, Ref Active, Inactivated. The row shows: Copy (stack of papers icon), Animal Use Protocol Form, Test reviewer worksheets - send DMR, Complete, 11/20/2019, 11/20/2019.
- Events (1):** A table with columns: Event, Att, FE, Instance/UDF, Start, Complete, Last Mtg. The row shows: IACUC New/Triennial Renewal Submitta...

- You will then be given two options: Copy or Copy for Amendment. In this case, we are copying since this option allows you to renew the protocol.

Choose an Action

 **Copy**

Use this option if you want to RENEW this study or start a new protocol using this protocol as template. Most answers will copy into the new protocol.

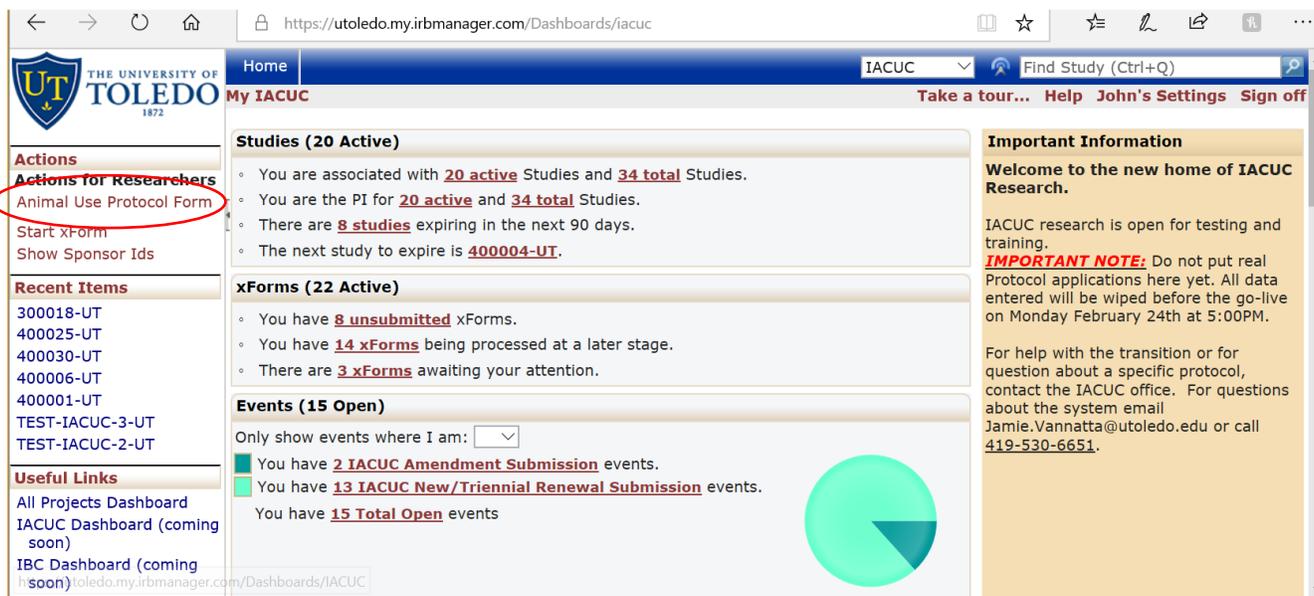
 **Copy for Amendment**

Use this option if you want to AMEND the current study. You will use this mechanism to request changes to the study, such as requesting additional animals or changing protocol procedures. You will also use this amendment to request a change of PI, however, changes to other study personnel will be done through the Personnel Amendment.

- This will give you an editable version of the protocol upon which to make any changes.
- At the bottom of each page are directional buttons that allow you to move to the previous or next pages or sections, save the form for later, and a more button. If you press the “more” button you are given various options including the options to view the form as a pdf, which will allow you to print it for later use.

Yes
 No

- If you do NOT have the section of the study labeled “Reference XForms”, you will need to click back on the Home button to return to the Home screen.
- In this case, we will choose to create an Animal Use Protocol Form.



The screenshot shows the IACUC dashboard with the following sections:

- Home** (selected)
- My IACUC**
- Actions for Researchers** (circled in red):
 - Animal Use Protocol Form
 - Start xForm
 - Show Sponsor Ids
- Recent Items**:
 - 300018-UT
 - 400025-UT
 - 400030-UT
 - 400006-UT
 - 400001-UT
 - TEST-IACUC-3-UT
 - TEST-IACUC-2-UT
- Useful Links**:
 - All Projects Dashboard
 - IACUC Dashboard (coming soon)
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 - The next study to expire is **400004-UT**.
- xForms (22 Active)**:
 - You have **8 unsubmitted** xForms.
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 - Only show events where I am: [dropdown]
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- Important Information**:
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9. The Animal Use Protocol XForm is organized into different sections or pages. You may answer them sequentially or use the dropdown list to skip to different sections in the form. It may be helpful to use your old PDF.

The screenshot shows the top navigation bar of the Animal Use Protocol XForm. On the left is the University of Toledo logo. In the center, there is a dropdown menu currently set to "A. Initial Demographics", which is circled in red. To the right of the dropdown is a "Page 1 of 12" indicator and a "Next" button. Below the navigation bar, the form title "Animal Use Protocol Form -- A. Initial Demographics" is displayed, followed by a note: "** you can use the drop-down list above to temporarily skip past error messages. *". The form content is organized into sections, each with a header and "Add Note" and "View Audit" links. The "Submitter" section shows the name "Joseph, Elaine", email "Elaine.Joseph@UToledo.Edu", and business number "4193834251". The "A.1. What is the title of your project?" section contains a large yellow text input area. The "A.2. Please indicate the protocol type for your application" section lists radio button options: Breeding, Classroom Instruction, Monitoring, Research, Research/Breeding, and Training. A third section header "A.3. Please indicate species involved in your protocol (one per protocol)" is partially visible at the bottom.

10. If you need to choose this option, please answer 'yes' to the renewal question on the first page of the xform.

If you have any questions, please contact Elaine Joseph at Elaine.Joseph@utoledo.edu