## IRBManager FAQ’s

<table>
<thead>
<tr>
<th>Question</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How do I obtain a user name and log in?</td>
<td>2</td>
</tr>
<tr>
<td>2. What if I forgot my password?</td>
<td>2</td>
</tr>
<tr>
<td>3. How do I change my password?</td>
<td>3</td>
</tr>
<tr>
<td>4. How do I update my user information?</td>
<td>4</td>
</tr>
<tr>
<td>5. How do I initiate a new study?</td>
<td>5</td>
</tr>
<tr>
<td>6. How do I submit an amendment, continuing review, or reportable event for a study that exists in IRBManager?</td>
<td>7</td>
</tr>
<tr>
<td>7. How do I submit an amendment, continuing review, or reportable event for a study that is not currently in IRBManager?</td>
<td>8</td>
</tr>
<tr>
<td>8. Can a student or other complete xforms?</td>
<td>8</td>
</tr>
<tr>
<td>9. How will I know the status of my submission?</td>
<td>9</td>
</tr>
<tr>
<td>10. I submitted a study, but cannot see it listed on my Home page.</td>
<td>10</td>
</tr>
<tr>
<td>11. How do I submit revisions requested by the IRB?</td>
<td>11</td>
</tr>
<tr>
<td>12. How will I know when my study is approved?</td>
<td>12</td>
</tr>
<tr>
<td>13. How can I add other investigators, research assistants, etc. to my study?</td>
<td>12</td>
</tr>
<tr>
<td>14. I submitted my continuing review but I continue to receive reminders about the upcoming expiration. Do I need to do anything?</td>
<td>13</td>
</tr>
<tr>
<td>15. How do I find attachments for studies that have been approved or that are under review by the IRB?</td>
<td>14</td>
</tr>
<tr>
<td>16. How can I share an xForm with others during the writing and editing process?</td>
<td>14</td>
</tr>
</tbody>
</table>
1. How do I obtain a user name and log in?
   1. UWM faculty, staff and students with an ePanther ID:
      a. Log in to IRBManager (https://irbmanager.becirb.com/?clientid=uwm) using your ePanther ID and password by selecting the 1Login link in the center of the IRBManager login page. An IRBManager account will automatically be created.
   2. Non-UWM personnel (without an ePanther ID)
      a. Complete the IRBManager log in and password request form on the IRB website. The IRB will email you your log in and a temporary password.
      b. Click on the IRBManager icon from the IRB website (IRBManager page) or go to: https://irbmanager.becirb.com/?clientid=uwm
      c. Click on the login link at the bottom of the login box to use an IRBManager issued login.
      d. Enter your User Name and Password as provided by the IRB. Enter the client as “uwm”. If you check the “Remember Client” box, “uwm” will be automatically entered each time you enter the IRBManager site from this computer.
      e. Upon initial log in, you will be required to change your password.

2. What if I forgot my password?
   1. UWM faculty, staff and students with an ePanther ID:
      Contact UWM UITS if you have issues with your ePanther ID or password.
   2. Non-UWM personnel (without an ePanther ID)
      If you have an account but forget your password, select the “Forgot Password?” option from the log in page. Enter your full email address and uwm as the client ID. You will receive an email with a temporary password. Upon initial log in with the reset password, you will be required to change it. Please note: you only have 3 incorrect entries before your account will be locked out and you will need to request a new password.
3. How do I change my IRBManager password (for non UWM personnel only)?

1. Upon initial log in, you will be required to change your password by entering your current password, your new password and confirming the new password. Select update for the change to be effective.

2. To change your password at another time, select “UWM’s Settings” from the upper right menu.

3. Click on “Change my password” to revise your current password.

4. You will then need to enter your old (current) password, a new password, and a confirmation of the new password. Press update for the change to be effective. If you press the back key, home key, or any other button that takes you out of this screen prior to clicking on “update,” your password change will not be recognized by the system.
4. How do I update my user information?

1. Clicking on **UWM’s Settings** in the **upper right menu** will direct you to another menu where you can view and edit any personal account or user specific settings.

   ![Image of the UWM Settings menu]

   - **Click on “Change my password”** to revise your current password. See question 2 for details.

   - **Click on “User Settings”** to make a change to your first name, last name, phone number or email address. Enter the new information in the appropriate section(s) and press update for the change to be effective.

   ![Image of the User Settings menu]

   - **Click on “Address Information”** to make a change to your address or add a secondary address.
     a. To make a **change** to your address press the “hand pointing to the paper” See Figure 4.6
     b. To **delete** the address information press the “x” button on the line displaying the address.
     c. To **add** a secondary or new address click on “add address” under the actions section in the left menu.

   ![Image of the Address Information menu]
5. How do I initiate a new study?
   1. Return to your HOME page.
   2. In the left menu, under the heading “Actions,” select “Start xForm.”

3. After selecting “Start xForm” from the left menu to initiate a new submission, you may print a copy of the form by selecting the printer icon or you may enter the xForm by selecting “New Study Form” in blue font. While completing the xForm, follow the instructions provided.

4. Items to consider when completing the xForm:
   a. The PI and Student PI must have an IRBManager account.
   b. Questions are asked in a variety of formats: short answer, check boxes, drop down menus, etc.
   c. Section notes provide details and helpful information about questions.
   d. Add a note allows the researcher to enter any special circumstances or notes you want the reviewer to be aware of.
   e. Options at the bottom of screen enable one to move through the xform.
f. At end of the xForm, attach any additional documents required for IRB review. You will find links to the current protocol form and consent templates on the attachment page.

g. After submitting a form, a message stating your form has been submitted will appear. If the screen states your form has been saved, the form was not properly submitted. Open the form to try again.
6. How do I submit an amendment, continuing review, or reportable event for a study that exists in IRBManager?

   a. Return to your home page by clicking on the “Home” icon.
   b. At the bottom center of the page, select the study number of the protocol needing a continuing review, amendment or reportable event.

   c. From within the study’s protocol page, select “Start xForm” from the left menu.

   d. After selecting “Start xForm,” you may print a copy of a form by selecting the printer icon to the left or you may enter an xForm by selecting the appropriate form in blue font.
7. How do I submit an amendment, continuing review, or reportable event for a study that is not currently in IRBManager?
Complete the word version of the submission form and submit it (along with any other required documents) via email to irbinfo@uwm.edu. The IRB will then enter your exempt study into IRBManager. All future submissions for the study can then be completed within IRBManager.

8. Can a student (or coordinator or other) complete xforms?
Yes, a student PI or other contact may complete the xForms. However, before the study can be submitted to the IRB for review the PI will need to approve the submission.

   1. When the SPI (or other) submits the form, the PI will receive an email with a link to the xform. The IRB will not receive the submission until after the PI signs off. If the PI no longer has the email with the link follow these instructions after logging in to IRBManager:
      a. In the center of the Home page select the option that reads, "There are #xForms awaiting your attention."
      b. Any xforms awaiting PI sign off should be listed.
      c. Click on the appropriate form.
      d. After reviewing the xForm and attachments, The PI can save the review for later, print a copy, accept the study and submit to the IRB by entering his/her IRBManager password in the “Submit” box, or send the xForm back to the student PI for revisions / corrections by completing the “Reject” box. After PI enters his/her password, do not press “Enter.” The appropriate action box must be clicked on or the form will not be submitted to the IRB.
      e. After submitting a form, a message stating your form has been submitted will appear. If the screen states your form has been saved, the form was not properly submitted. Open the form to try again.
f. If the PI requests changes, the student PI will receive an email listing the changes with a link to the xForm. After making the corrections the student PI will re-submit the xForm and the PI will receive another email requesting PI approval.

9. How will I know the status of my submission?

   a. Select the study of interest from your Home page by selecting the IRB number in blue font.
b. Then select the event (new submission, amendment, continuing review, etc.) of interest.

c. The steps for IRB review will then be listed with dates for expected or completed steps.

10. I submitted a study, but cannot see it listed on my Home page.
The study must be submitted by the PI of the study. After the IRB accepts the study into the system, you will receive an email stating this and then the study can be accessed from your Home page.

If you cannot find your study on your Home page, the PI may not have signed off on it yet or the IRB may not have completed its initial review to accept it into the system. To find the status of your xform, click on “You have # xForms being processed at a later stage.” Here you should find the xform and see what stage it is in.
<table>
<thead>
<tr>
<th>Stage</th>
<th>What it Means</th>
<th>Who has access to the form for edits?</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Study Data Entry</td>
<td>Study is in progress and has NOT been submitted yet</td>
<td>Form Creator</td>
</tr>
<tr>
<td>New Study Data Entry (2nd time, 3rd time, etc)</td>
<td>Study has been sent back to the creator for revisions.</td>
<td>Form Creator</td>
</tr>
<tr>
<td>Awaiting PI Sign off when SPI or other submits</td>
<td>Study has been submitted by form creator but has not been submitted by the PI. The IRB cannot review it at this stage.</td>
<td>PI</td>
</tr>
<tr>
<td>Awaiting IRB to Accept into IRBmanager</td>
<td>The form has been submitted but has not been accepted into the system by the IRB yet. Please allow up to 2 business days for this stage.</td>
<td>IRB</td>
</tr>
<tr>
<td>Being Reviewed by IRB</td>
<td>The form has been accepted by the IRB and is in the review process. The study also has a number generated at this stage and it will be listed on the Home page.</td>
<td>IRB</td>
</tr>
<tr>
<td>Complete</td>
<td>The review is complete and the event is approved.</td>
<td>Form Creator</td>
</tr>
<tr>
<td>Error</td>
<td>Please contact the IRB if this is listed.</td>
<td>IRB</td>
</tr>
</tbody>
</table>

### 11. How do I submit revisions that have been requested by the IRB?

1. If revisions are requested by the IRB, **ONLY** the person that created the xform will receive an email with the link to the xform. However, an email with an attached letter describing these revisions will also be sent to the PI, SPI and any other contacts.

2. The email will contain a list of the requested revisions and a link to the xform. If the email is not available, follow these instructions to access the xform:
   a. In the center of the page is an option that reads, "There are #xForms awaiting your attention." Click on that.
   b. Any xforms awaiting your completion should be listed.
   c. Click on the appropriate form.

3. To complete the revisions:
   a. Highlight, bold, or underline each revision in the appropriate document.
   b. Re-attach each revised document to the study x-form.
   c. In addition, attach a cover memo to the x-form that explains how each requested revision has been addressed.
   d. Resubmit the x-form to the IRB for review. If you are not the PI, the PI will receive an email notification that sign off for the study is required before the revisions are submitted to the IRB. When you have fulfilled the requested revisions, you will be notified by email about the status of your protocol.
12. How will I know when my study is approved?
Primary contacts for a study will receive an email to notify of IRB approval. In addition, you may view study status by following the steps in question 7 above. Approval letters can be found as attachments in the study event page.

13. How can I add other investigators, research assistants, etc. to my study?

1. Select the “Add Protocol Site – Contact” option from the left menu.

2. You can then add the name of the contact by typing the first or last name into the text box. Followed by the “Enter” key.
   a. If multiple IRBManager users, have the same first or last name, a drop down list will appear for the correct contact to be added.
   b. Please note entering a single letter (followed by the “Enter” key) will create a drop down list of IRBManager users with a first or last name beginning with that letter.
   c. You may also enter a series of letters in the middle of a name by adding the percent symbol before and after the letters. (%and%) 
   d. If the name of your contact is not found, he/she will need to request a user account by visiting the UWM IRB website: (http://www4.uwm.edu/usa/irb/researchers/irbmanager.cfm)
3. You will then assign a role to the contact. Please note that Co-Investigator, Coordinators, and Faculty Advisors will be copied on all IRB notifications about study expirations, but Research Assistants, consultants and cc recipients will not receive those notifications.

4. Select the green check mark to complete the contact addition.

5. The contact will now have access to the study through the IRBManager system.

6. The contact may complete amendment, continuing review, and reportable event xForms for the designated study. However, the PI will need to review and approve the forms before it is submitted to the IRB through the system.

14. I submitted my continuing review but I continue to receive reminders about the upcoming expiration. Do I need to do anything?

No, you do not need to do anything. The reminders will continue to be sent until final approval (and update of the study expiration date) is completed. Please disregard the notices if you have already submitted the continuing review and received an email from the IRB stating it has been accepted into the system.
15. How do I find attachments for studies that have been approved or that are under review by the IRB?

On your IRBManager home page, find the list of studies on the bottom half of the page. Click on the study of interest. Once in the study home page, find the event associated with the documents you are looking for—New Study Submission, Amendment submission, etc.—and click the even name. On the next screen, the event home page, there will be a menu of “Actions” on the left side of the screen. Find “Attachments” and click on that to bring you to a page that will list all of the documents associated with that event and study.

16. Can I share an xForm with others during the writing/editing process so they can review and edit the xform?

Yes, you may now share an xForm with others during the writing/editing stage. Collaboration will allow a person other than the author of the form to edit, manage, and/or submit an xform. This option will allow other co-investigators or team members (with an IRBManager account) to assist the author of the form with reviewing, editing and/or submitting.

As an example:
Previously, a faculty PI was only able to review a student’s xform after the student submitted it to the PI for “sign off.” If the PI found an error or wanted a correction, the PI would need to “reject” the form back to the student for revisions.

NOW, the student can add the faculty PI as a collaborator and the faculty PI can review the form as the student works on it, make changes to the form, add attachments to the xform, and/or submit the form to the IRB. As soon as the student adds the PI as a collaborator, the PI will receive an automatic email with a link to the xform. In addition, the faculty PI will be able to find the xform in in the “xForms awaiting your attention” section of his/her IRBManager Home page.

The author can share access to an xform by:
1. At the top of each page of the xForm, select “Collaborators.”
2. A new box will open:

a. Enter the email of the person you wish to share access to the form with.

b. Select the type of access you want the person to have:
   i. Edit – This will allow the person to edit the form.
   ii. Edit and Manage – This will allow the person to edit the form AND invite new collaborators.
   iii. Edit, manage and submit – This will allow the person to edit the form AND invite new collaborators AND submit the study.

c. You may add text to the “Note for Collaborator” box and this information will be included in the automatic email that notifies the collaborator that they have access to the form.

d. Select the “Add” Box.

e. The collaborator will automatically be sent an email to notify him/her that he/she has access to the form. The email will include a link to the form. In addition, the collaborator can find the form in the “xForms awaiting your attention” section of his/her IRBManager Home page.

f. The list of current collaborators will be listed at the bottom of the box.

3. You may view, add or remove collaborators at any time by selecting the “Collaborators” link at the top of each page of the xForm.