IRBManager User Guide

Updated 11/30/2021

Contents

Overview

IRBManager is an online submission, workflow, and data management system for Chicago Public Schools' (CPS) Research Review Board (RRB). The electronic forms provided within this system will allow users to submit new studies for review as well as submit other forms for continuing review, modifications, unanticipated problems or adverse events, and final reports. These forms are then used to electronically route the study through the required review process. Through IRBManager, investigators have access to see the projects they are investigating and any associated permissions for site access or data request clearance. Each project or data request submission will provide a list of events. Events can be viewed as folders for the separate submission events required for each study such as the initial submission, modifications, continuing reviews, and data requests. Each event will contain all associated forms, documents, and letters along with a listing of review steps, which are updated to notify the investigators where the submission is within the review process.

Account Setup

How can I obtain access to IRBManager?
IRBManager can be accessed by visiting: https://cps.my.irbmanager.com/

Why would I need to access IRBManager?
If you would like to submit a Research Review Board (RRB) or Data Request proposal, you must do so using IRBManager.

How do I create an account?
If you are new to CPS IRBManager, the first step is to create an account. Please click the "Click here to register" link as seen in the screenshot below.

Important: Those with CPS credentials do not need to register using this link. Please see guidance specific [LINK] to staff users for more information on how staff may access IRBManager.
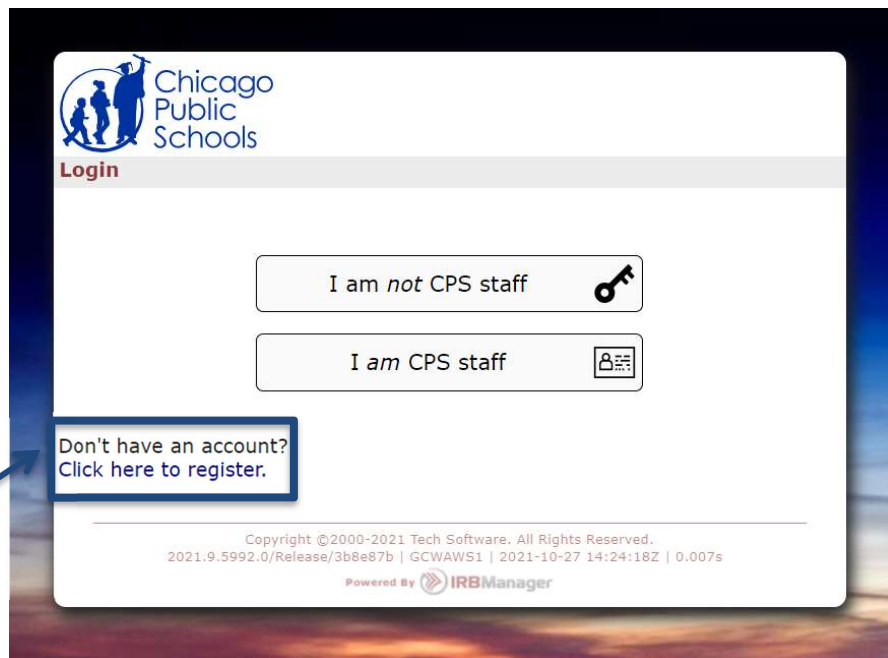
Navigating the Dashboard

Upon logging in, your dashboard will appear.

Here, you will be able to access your active, inactive, and pending project and data request submissions, as well as begin new proposals/requests. When you save a form without submitting it, you will be able to re-access the form and complete it through the dashboard. You can begin a new RRB submission or External Data Request by clicking on the links at the top of the page.

You will also be able to export your project statuses to excel for easy reference or reporting by clicking on the "Export to Excel" button.

My Projects

	1

Click here to begin a new RRB submission.   Click here to begin an External Data Request   Start Other xForm

Export to Excel

1 Unsubmitted

Research Review Board (RRB) Submission
Data Entry

Started on moments ago

All My xForms

Notices

The Research Review Board (RRB)

The CPS RRB meets on a six week cycle to review external research proposals. RRB approval is required before researchers enter CPS schools and begin study activities. Although RRB approval is necessary to begin, school principals and administrators do have the final decision regarding any study activity; RRB approval does not override the wishes of school leadership and/or staff. The RRB is chaired by representatives from the CPS Research Team and is made up of members from various Chicago Public Schools offices. Please do not submit proposals to the RRB if your study and/or request ONLY involves the use of secondary administrative data. Please see the RRB Guidelines for more information on the process and policy outlined below.

Messages & Links

Background Check Information

After submitting your first form, you will see four tabs on your dashboard:

My Projects

1 Projects	1 RRB	3 xForms	2 Events

Export to Excel   Click here to begin a new RRB submission.   Click here to begin an External Data Request   Start Other xForm

2021-053-CPS
Active   Exp 10/12/2022
N/A

Projects – Here, you will find a list of all active and non-active projects with which you are associated.

RRB – Here, you will find a list of projects specific to the RRB.

xForms – Here you will find all xForms (RRB and Data Request forms) that may need your attention or that you have started working on and saved for later.

Events: Once a form has been submitted and accepted into IRBManager, an event s created. Here you can find all events associated with your account.

Submitting a Form

When you begin a new RRB submission or Data Request, you will be taken to the form submission page.

On every RRB submission or Data Request submission page you will see required questions. All questions marked *Required* must be answered to proceed with the form. In some cases, your responses to certain questions will result in additional questions or pages within the form being required. You can navigate from page to page without answering the required questions using the dropdown centered at the top of the form, but all required questions must be completed to finalize and submit the form.

Click here here to add other contacts to help you complete the form.

Use this dropdown to navigate between pages if *not all* required sections are complete.

Click here to navigate between pages if all required sections are complete.

👥 Collaborators   Funding and Intervention Inf... ▼   Page 4 of 14   Next

y Board (RRB) Submission -- Funding and Intervention Information

Please check all of the following that apply to your research protocol: *(Required)*   Add Note   View Audit

Click here to add a note for your collaborators.

Click here to see all changes from you or your collaborators.

Will this research require the use or access of existing CPS data? *(Required)*   Add Note   View Audit

Will this research require the use or access of existing non-CPS data? *(Required)*   Add Note   View Audit

Previous   Next   Save for Later   More ▸

Click here to save your responses and complete the form later.

Click here to access useful collaboration functions, such as showing questions where changes have been made, viewing the form and associated responses as a PDF, and more.

Project Page

To access the project page, click on your project identification number under the projects tab. This will take you to the project page:

The Project page contains high-level information about the project and associated events. All events associated with a project will be shown at the bottom of this page. The project page also is a useful place to check approval statuses for the project. To see all schools associated with a project, hover over the "and others" text in the "Site(s)" field. This will show you all schools with which this project is associated.

Project Actions On the left-hand side of the page, under actions, you can use the following features:

Send Email: this function allows you to send and store emails associated with the project from IRBManager. This is helpful for future reference of communications associated with the project

Start xForm: click this button to start a new xForm on the project.

xForms: click this button to see all xForms associated with the project

Events

Once a form has been submitted and accepted into IRBManager, an event is created. In addition to new submissions, events include modifications, initial reviews, and X. To see what events are open, look under the events section and you will be able to check out the status of that event. You can also access relevant events from the project page.

▾ Events (2)									collapse
Event ◆	Att	FE	Instance/UDF			Start ▲	Complete ◆	Last Mtg ◆	Group ◆
Modification/Continuing Review	4					10/13/2021			
New Submission	5		N/A			10/08/2021			

You can also access all of your events by clicking the "Events" tab on your dashboard

My Projects

📚 1 Projects	📚 1 RRB	📄 3 xForms	📅 2 Events

2 PI	1 Modification/Continuing Review	1 New Submission

Modification/Continuing Review

2021-053-CPS
10/13/2021
Sell, Jared MA

New Submission

2021-053-CPS
10/08/2021
Sell, Jared MA
N/A

This dashboard is showing the following events: a) a Modification/Continuing Review, and b) a New Submission event.

Clicking on the event name will take you to the event details page

Event Details Page

Upon clicking on an event, you will be taken to the event details page. The Event Details Page contains information concerning the specific event related to a project.

Project-Site: This contains information about the study.

Event: This details information about the specific event.

Emails: This section catalogs all emails that have been sent or received in regards to the event. You can download copies of

Steps: This shows the internal-to-CPS processing stages of the event. Here, you can check up to see what internal progress has

Chicago Public Schools

Home | Find Project (Ctrl+Q)

Event Details: New Submission on 2021-053-CPS | Help Jared's Settings Sign off

Project-Site

Project: 2021-053-CPS | Site: CPS - Chicago Public Schools
Title: N/A | Committee: RRB
PI: Sell, Jared MA | Sponsor Id

Event

Type: New Submission | Started: 10/08/2021
Instance: N/A | Completed:
Committee: Inherited from Study
Review Type:
Submission Date: 10/08/2021

Actions
Attachments (4)
Send EMail
Start xForm
xForms (1)

Done

Recent Items
2021-053-CPS

Useful Links
Background Check Information

My Docs & xForms
0 Attachments
1 xForms

▼ **Emails (1)** | collapse

Subject	Date	Del	To/From
Chicago Public Schools has Received a Study Proposal from Jared Sell	Friday at 4:21 PM ET		jsell1@cps.edu

Steps (10) | ☑Hide Skipped

Step	Planned	Actual	Complete	Minutes	Micro Note
Receive Submission		10/08/2021	Yes		
Pre-Review		10/08/2021	Yes		
Reviewer Assignment		10/08/2021	Yes		
Board Meeting	10/08/2021		No		
Post-Meeting Determinations			No		
Notify PI of Final Determination			No		
Submit Data Request Form	10/15/2021		No		

Event Actions: On the upper left-hand side of the event details screen, you will see a list of actions

Attachments: Here, you can view and export all attachments associated with the event.

Actions
Attachments (4)
Send EMail
Start xForm
xForms (1)

Done

Click "Start xForm" to start a new xForm on the event (if available)

Click "xForms" to view all xForms associated with the event.

Send Email: Here, you can send an email associated with this event.

Submitting RRB Continuing Review and Modifications

To submit a Continuing Review and/or Modification request, you must access the **Project Page** for the study that you wish to modify/request for continuing review. Access the **Project Page** by clicking on the relevant project's protocol number on the dashboard:

	1 Projects		1 RRB		3 xForms		2 Events

Export to Excel | Click here to begin a new RRB submission. | Click here to begin an External Data Request | Start Other xForm

2021-053-CPS
Active   Exp 10/12/2022
N/A

Click on the project link to access the project page to submit a modification

From the project page, you will need to navigate to the Reference xForms section and click the copy to amend button under **Action.** Please see the screenshot below for reference:

Additional Study Subjects: Administration
Primary Study Organization: N/A
Study Participant Type: Other Staff
Comments: N/A

Background Check Level Required: Level I
Primary Study Subject: General Curriculum and Instruction

Project-Site
Site(s): CPS - Chicago Public Schools and others
Status: Active
Approval: October 13, 2021 for 12 months
Initial Approval: October 13, 2021
Associated Projects:
Comments:

PI: Sell, Jared MA
Additional: N
Expiration: October 12, 2022
Other Expirations:

▼ **Reference xForms (1)**   collapse

Action	Form	Identifier	Stage	As Of	Ref Active	Inactivated
📄	Research Review Board (RRB) Submission	N/A	Complete	10/13/2021 at 1:30 PM ET	10/13/2021 at 1:30 PM ET	

▼ **Events (2)**   collapse

Event	Att	FE	Instance/UDF		Start	Complete	Last Mtg	Group
Modification/Continuing Review	4				10/13/2021			
New Submission	5		N/A		10/08/2021			

Click the paper icon with the green "+" symbol to begin your modification/continuing review form

After clicking this icon, you will have begun the continuing review/modification process. You will begin by responding to some high-level questions regarding the modification or continuing review. Specifically, you will be asked to indicate the proposed modification areas.
IMPORTANT NOTE -- After indicating the proposed modification areas, you must make the associated changes to your original proposal in the following pages. This will create a tracked changes event that will enable the Research Review Board to track substantive changes that you have made since your most recent approval.

Preliminary Results to Date *(Required)*   Add Note   View Audit

Type of Request *(Required)*   Add Note   View Audit

○ Continuing Review   *Please select continuing review if no changes have been
● Modification   made to your study protocol. If you plan on proposing a
                             modification AND a continuing review, please select
                             modification, as an approved modification will extend your
                             approval period.*

Indicate Proposed Modification Areas *(Required)*   Add Note   View Audit

☐ Research Questions or Hypothesis   **After summarizing your proposed**
☐ Study Timeline   **modifications on this page, please update the**
☐ Study Population   **following pages as appropriate. Please**
☐ Recruitment Methods or Advertising   **update all aspects of your proposal to reflect**
☐ Study Methodology and/or Research Activities **your proposed modifications. Any changes**
☐ Consent Form(s) or Consent Process   **made within your proposal will be displayed**
☐ Survey/Instrument(s)   **as tracked changes to your assigned**
☐ Type of Data Collected   **reviewer.**
☐ Additional Research Staff
☐ Change of Principal Investigator
☐ Other

**Optional Attachments - please attach any reports/publications that have been created   Add Note   View Audit
thus far here.**

Add Attachment

After submitting your modification and/or continuing review application, you should see a new event on your project. See below for what this would look like on the **Project Page**:

Events (2)								collapse
Event	Att	FE	Instance/UDF		Start	Complete	Last Mtg	Group
Modification/Continuing Review	4				10/13/2021			
New Submission	5		N/A		10/08/2021			

You can see the modification event for the study here.

Settings / Resources

Project Search

If you are a researcher associated with several CPS projects, it might be helpful to use the "Project Search" functionality. To do so, simply click on the magnifying glass icon in the top right corner of the screen and search for the project that you are looking for.
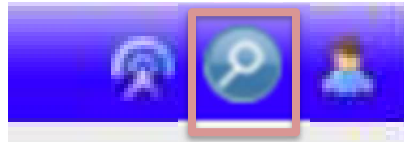
Edit Settings

By clicking on the menu button and selecting "[User Name]'s settings", you can access options to modify your profile, change your password, and more:
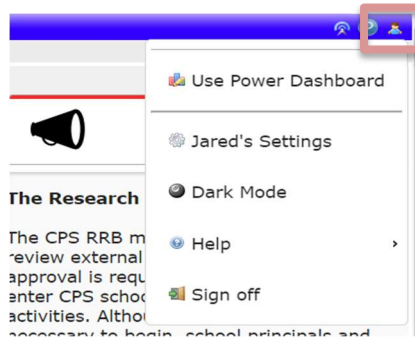
Here you can access the following settings:
- Change My Password
- Change My Profile
- My Phone Number(s)
- My Address(es)
- My Expirations
  - Note: This is useful for keeping track of proposals needing to undergo our continuing review process or need closing out.
- My Attachments
- Last 25 Logins
- Email Signature
- Turn on Dark Mode
- Reset Dashboard
- Switch Dashboard
  - Note: We recommend using the default Dashboard, as guidance is not provided for navigating alternative dashboards.