IRBManager User Guide

Updated 11/30/2021

Contents

Overview
Account Setup
Navigating the Dashboard
Submitting a Form
Creating a Project: RRB or Data Request
Managing an Event: New Submission, Modifications, Requests for Changes
Settings and Resources
Glossary and Appendix
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.

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

- **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 is 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.
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.

You can also access all of your events by clicking the “Events” tab on your dashboard.
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.

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

- **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.
- **Attachments:** Here, you can view and export all attachments associated with the event.
- **Send Email:** Here, you can send an email associated with this event.
- **Click “Start xForm” to start a new xForm on the event (if available).**
- **Click “xForms” to view all xForms associated with the 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:

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:

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

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.

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**:

You can see the modification event for the study here.
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.