How to Start a
New webIRB Study Application
What you will learn

1. Links to webIRB (p.3)
2. How to Create a New Study (p.6)
3. My Home (p.8)
4. Create a New Study (p.8)
5. Navigating the Smartform (p.10)
6. IRB Numbering (p.14)
7. Study Workspace (p.13)
8. My Activities (p.15 - 23)
   • PI Assurances (p. 19)
9. Checking Smartform Progress (p.25)
10. Responding to IRB Feedback (p. 26)
11. Post Approval Activities (p.35)
12. Where are documents stored? (p37)
13. Updating your Profile (p. 39)
14. Where to get Help (p.49)
15. Types of Application Items (p. 51)
Links to webIRB

1. webIRB website
   - https://webirb.research.ucla.edu

2. Training Website (Sandbox)
   - https://webirbsandbox.research.ucla.edu/sandbox
How to Create a New Study

1. Go to the webIRB Sandbox at:
   https://webirbsandbox.research.ucla.edu/sandbox
   • **Important Note:** The Sandbox is for *practice only*. Do not use it for studies that you plan to submit to the IRB. Studies in the Sandbox *cannot be processed*.

2. Look on your desk for a card with sandbox accounts for a PI and a Study Staff.
   • If you are an Investigator, use the **PI User Name** and password
   • If you are Study Staff, use the **Study Staff User Name** and password
When do I start a New Study Application?

1. For submissions of new studies to the IRB
2. To convert paper studies at the time of Continuing Review

Important Note: The IRB will only accept webIRB applications for new studies and CR after 9/30/10
How to Create a New Study: Login

1. Click Login
How to Create a New Study: Login

Enter the *Training Account* User Name and Password (1234)
My Home

1. **Navigation Bar**
   (My Home - find your way home)

2. **Breadcrumb**
   (Find your way through the study workspaces)

3. **My Inbox**
   contains links to studies/actions that need your attention.
   1. **NS** = New Study
   2. **PAR** = Post Approval Reports
   3. **AM** = Amendment
   4. **CR** = Continuing Review

4. **My IRB Studies**
   All open studies
My Home

Click to create a New Study
Navigating the Smartform

1. The Application Smartform will open.

2. When you see a click it for context sensitive Help.

3. After you complete the first page, click Save.

Note: For instructions on how to complete specific types of items go to slides 45 through 49.
Navigating the Smartform

1. More activities will appear at the top of the page.

2. Click **Save** (before you walk away from your desk or if you are on a screen for more than 15 minutes)

3. Use **Continue** to navigate forward through the form
Navigating the Smartform

1. Use the **Jump to** Menu to go to application sections
   - **Red Title** – where you are
   - **Black Titles** - sections that will be required

**Note:** More sections may be added as you answer items in the form

2. **Exit** will take you to the study workspace. Click it.
Study Workspace

1. Summary
   Information about the Study

2. Current State

3. Views of the Study

4. Study Activities

5. Information Tabs
A Note about IRB Numbers

- **Before submission**, studies get a PRE#. For example, PRE#10-000010
- **After submission**, studies get an IRB#. For example, IRB# 10-000325
  - The PRE# and the IRB# will not match
  - All conversion studies will get a new IRB#

**Important Note**: Inform campus departments and sponsors of new IRB# for Conversion Studies.
My Activities

PI Activities
- Send Notification to FS for FS Assurances
- Submit Study
- Send Training Reminder
- Withdraw
- Edit PI Proxy
- Copy Study
- Study Team - Log Private Comment

Study Staff Activities
- Send Ready Notification
- Copy Study
- Send Inquiry or Reply to IRB
- Study Team - Log Private Comment

PI Proxy Activities
- Submit Study
- Send Training Reminder
- Withdraw
- Copy Study
- Study Team - Log Private Comment

Available activities differ by the current state and by the role of the person.
If you have a **Faculty Sponsor** for the study, His/Her assurances are needed **before** the study can be submitted. Click here to send a message.
My Activities: Submit Study or Send Ready Notification

Click **Submit Study** (or **Send Ready Notification**) when the application is complete.
My Activities: Submit Study or Send Ready Notification

1. If the application is complete, you will get a Submit Study screen. Click OK.

2. If there are still items to complete, you will get an Error/Warning Message. You would use the blue link to go to the page with the needed item(s). Instead click Close.
My Activities: PI Assurances

**IMPORTANT:**

*After* the study is submitted, the **PI Assurances** become available. The PI must complete them **before** the study can be approved.

The study team can check to see if the assurances are completed on the summary screen.
My Activities: Withdraw

Use carefully: Click Withdraw if you are no longer planning on conducting the study.
My Activities: Edit PI Proxy

Click **Edit PI Proxy** if you need to appoint a person on the study to submit it for you.
My Activities: Copy Study

Click **Copy Study** if you want to copy a study as a starting point for a different study.
My Activities: Log Private Comment

Click Study Team – Log Private Comment if you want to leave a message for the study team.
Going back to work on the Smartform

2. Click **Edit Study** to go back to the Smartform
Checking Your Progress

1. Click **Hide/Show Errors**

2. A screen will appear with links to pages needing completion. Click the links to go to the pages.

3. Once you complete the item(s), click **Save** and then **Refresh**.

4. The error screen will update. Click **Hide/Show Errors** again to hide the screen.
Exit the Application

Click **Exit** to go back to the Study Workspace
Responding to IRB Feedback

1. Go to My Home

2. Click on the Study in your Inbox titled “Test Study for PI/Study Staff Training”
Where to find IRB Feedback

The PI, Contact Person and PI Proxies will receive an automatic email notification when the IRB sends correspondence.

**Note:** When the IRB first sends out feedback on a study the link will briefly disappear from your workspace while it is being copied.

1. Click on the **IRB Requests** tab. A list of requested changes will appear.

2. **Note:** If there is formal correspondence, it will be listed under the **History** and **Correspondence** tabs.
Responding to IRB Feedback

2. Click on the **Section Name** next to **Jump To**. This will take you to the smartform page.

Note: There is a quirk in the webIRB program that displays the IRB staff names under “Reviewer.” The staff are actually the “Minutes Recorders” and “Contact People”, not the reviewers.
Responding to Feedback (cont.)

1. Once on the page, click the arrow next to **Reviewer Notes**. The note will appear.

2. Make all of the needed changes on the page.

3. When the changes are complete, click **Click here to respond**.

4. A dialogue box will open.
   a. Use the pull down menu to indicate how you are responding
   b. Write a response to the IRB in the Text box.
   c. Click **OK**
Responding to Feedback (Cont.)

1. When all of the responses are complete, the color of the notes will change from **red** to **green**.

2. To return to the Study Workspace, Click **Save**, then **Exit**.
Exit the Application

Click **Exit** to go back to the Study Workspace
Responding to Feedback (Cont.)

1. Once all of the requested changes are made, all of the notes under the **IRB Requests** tab will be **green**.

2. Click **Submit Response** to submit the revised application to the IRB for review.

   (Note: another activity box will appear for you to complete. You will have a place to record any additional comments.)
Two More Tips

The IRB Staff working on your study is listed here.

You can send the IRB Staff a message by clicking here.
Post-Approval Activities

1. Click on My Home

2. Click on the My IRB Studies tab

3. Click on the link to “Sample Approved Study...”
Approved Study Workspace

The buttons to create PARs, Amendments and CR will be in the lower left corner.
Where are the documents stored?

Click On Approved Documents
Links to stamped consent forms and documents that were uploaded to the application.

Important Note: Don’t add footers to documents that will be stamped by webIRB.
Updating Your Profile

Go to the webIRB website

- [https://webirb.research.ucla.edu](https://webirb.research.ucla.edu)
Logging In

Getting Started:
1. Click **Login**
Logon

1. Enter your UCLA Logon ID and Password
2. Click Login
Update Contact Information

1. Click your name
Update Contact Information

2. Check to make sure that the information in the text boxes is current.

3. When you are done, **click Apply**

4. Click **My Home**
Update Profile

The Profile records information that will be central to all of your IRB submissions.

1. Click the Profile tab
2. Click the link to your Profile
Update Profile

3. Click Edit Researcher Profile
Update Profile

4. Click Continue
5. Items that are in **blue** come from the UCLA Employee Database

6. Items on the profile will be available to the IRB for all of your future applications. So you only need to update them as needed.

You can complete the rest of the items, as applicable, on your own.

7. Click Continue
Update Profile

8. If you want specific study personnel to automatically populate your webIRB applications, they can be added on this page.

9. Click Exit.
Where to get Help
Questions?
Types of Application Items

1.0
* Full Title of the Submission:

2.0
* Type of Submission (Select one)
- New Submission
- Transfer of Ongoing Research from Another Site from Investigator moving to UCLA
- Continuation of Previously Approved Paper Submission

Note: Items with * are required.

1.0
* Indicate the locations where research activities will be performed with participants and/or private information obtained.

Check all that apply:
- UCLA or UCLA Network site
- Off Campus (in the United States)
- Outside the United States
- Outside California
- Internet

Radio Buttons - one possible response

Text Box – Type in Response

Check Boxes – multiple responses possible
Types of Application Items (cont.)

4.0
*Study Contact Person: Indicate the person, in addition to the Principal Investigator, who should receive all of the study correspondence.
Jin Kim (Co-Investigator) [Select…]

5.0
Indicate the key personnel for this study:

- Add
- Name
- Department
- Role
- Other Role (If Applicable)
- Will Obtain Consent?
There are no items to display

1.1.1.1
If yes, attach the paperwork submitted to and any correspondence from the CIRC.

- Add
- Name
- Version
There are no items to display

- Single Person Selector
  (see page 47)

- Multiple Person Selector
  (see page 48)

- Upload File
  (see page 49)
1. Click **Select**

2. A drop-down box will appear.

3. Type in the first few letters of the last name into the text box and click **Go** to search for the name.

4. Select the name by clicking the radio button

5. Click **OK**
Pop-Up Windows & Multiple Person Selector

1. Click **Add**.

2. The pop-up window will open, click **Select**

3. A drop down box will appear.
   a. Type in the first few letters of the last name and click **Go** to search for the name.
   b. Select the name and click **OK**
   c. Complete the other items in the pop-up window

4. Click **OK and Add Another** if you have more people to add to the study, if not just click **OK**.
Upload File Attachment

1. Click **Add**
2. A window will appear, click **Browse**
3. Use the **Choose File** box to locate and upload a document on your computer.
4. Name the file and either click **OK** or **OK and Add Another**

**Tips:**
- A document must be saved to your computer (hard drive, network drive, etc.) before it can be uploaded to webIRB.
- Be sure to add a version date to the title of the file.