PI & Study Team Quick Reference Guide #2: Create a New Study (101209)

Log Into webIRB

1. Go to http://webirb.research.ucla.edu/WEBIRB/
2. Click **Login.** The following screen will appear:

3. Fill in your UCLA Logon ID and Password.
4. Click **Sign In Now**

Start a New Study

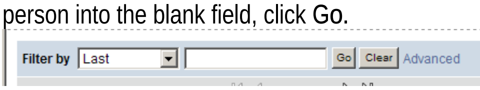
1. From your Home Page, Click **New Study.**

2. Enter the requested study information on the first page of the Smartform.
3. Click **Save** and then **Continue** on the toolbar at the top of the page.
4. webIRB will guide you through the required forms. Each time you complete a form click **Save** and **Continue.**

The Select Function to add People to the Study

1. Click **Select**

   - A new window will open displaying all of the UCLA Faculty/Staff with webIRB accounts.
   - Filter through the names by typing the last name of the person into the blank field, click **Go.**



   - Select the name of the name of the person from the list *(if the name is not on the list, complete and submit the account request form next to this item)*
   - Click **OK.**

Add Documents

1. Click **Add.**
2. If the following screen appears, click **Always.**

3. Enter a **Title** for the document you are uploading.
4. Click **Browse.**
5. Locate the file on your computer, select and Click **Open.**
6. Enter a **title** for the document. *Tip: Enter a version date as part of the title.*
7. Click **OK.**

Add Key Personnel

1. Click **Add.**
2. When a new window appears, click **Select**
   - Another window will open displaying all of the UCLA Faculty/Staff with webIRB accounts
3. Filter through the names by typing the last name of the person into the blank field, click **Go.**
   - Tip: If you just know the first letters of the name use % as a wildcard (e.g., "Sm%" for "Smithereens.")

4. Select the name of the person from the list *(if the name is not on the list, complete and submit the account request form next to this item)*
5. Click **OK.**
6. Complete the other requested information.
7. Click **OK** (or **OK and Add Another** if you have more key personnel to add to the protocol).

Print Application

1. To print the *complete application*:
   - From the Study Workspace, click:

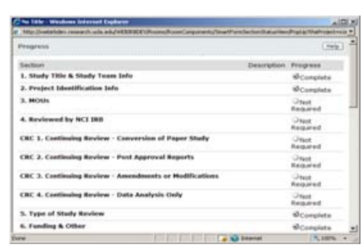
   - Click **Print.**
2. To print a *section of the application*:
   - Go to the section of the application that you want to print.
   - Click **Print** at the bottom of the page. A new page will appear

   - Click **Print** again at the top of the new page.

View Smartform Progress

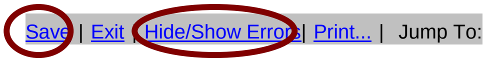
1. From the Study Workspace, click:

2. The status of each section will appear (Complete, Not Required, or Incomplete).
   - Open the application and use the Jump To menu to go to the incomplete sections.



Hide/Show Errors

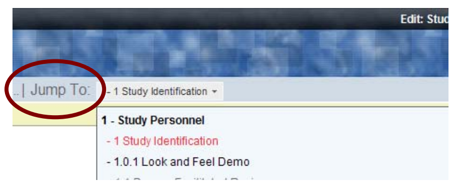
1. While inside the study application click **Save**.



2. Then click **Hide/Show Errors.**
   - ➢ Required fields that need completion are displayed in a window at the bottom of the page. (Note: The default setting is Hide Errors)
3. Click on a link to jump to a specific section.
4. When the section is complete, click **Save** before jumping to the next section.
5. To hide the list, click **Hide/Show Errors** again.

Note: There are two kinds of errors: 1) Not completing a required sections; and 2) validation errors (e.g., inconsistent answers or answers dependent on how you answer an earlier item). These are listed separately under Hide/Show Errors. So, you may need to look in two places for the errors on one page.

"Jump to" List : Find a Section of the Application



1. Use the **Jump To** list to directly access any section of the application.
   - ➢ Based on your answers at each point in time, the items on the list will appear as follows:
     - o The current section is listed in red.
     - o Required sections are **bolded.**
   - ➢ Based on your answers as you complete the sections these attributes may change.

2. Recommendations:
   - ➢ Use the **Continue** button to navigate through the application the first couple of times that you use it.
   - ➢ Use the **Jump to** list when you know how the sections are arranged and/ or if you need to leave a section before it is completed.

Helpful Hints

1. Copy and Paste into Application Text Boxes

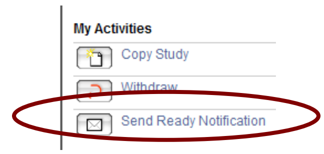
   - ➢ You can copy and paste test from electronic documents into the webIRB text boxes.
   - ➢ Note: some of the formatting will be lost (e.g., bolding, superscripts and Greek characters).

2. Save Often

   - ➢ Click **Save** often if it will take you a long time to complete a page. This will prevent losing data if the page system times out.

Submit the Study/PI Assurances

1. Study Staff
   - ➢ In the application go to **Section 100- Instructions for Study Submission**
   - ➢ Click **Finish,** at the top or bottom of the screen, to finalize and exit the application.
   - ➢ Under My Activities, click **Send Ready Notification.**



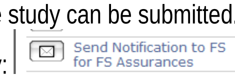
   - ➢ When the activity screen opens, **click OK**
   - ➢ Complete the screen and click **OK.**

2. PI/PI Proxy
   - ➢ Go to the Study Workspace.
   - ➢ Click **Submit Study.**
     - o If application sections are not complete, an error message will appear. Click on the links to jump to the items needing completion.

3. **PI Assurances** (PI's homepage only)
   - ➢ After the study is submitted, the **PI Assurance** button will appear under My Activities.

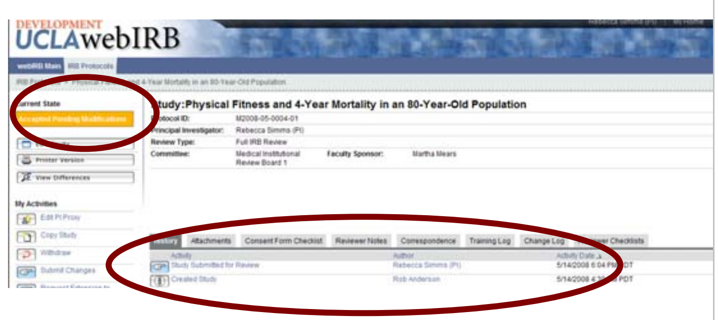
   - ➢ Click it. An activity form will appear with the **PI Assurances.** These must be completed before the study can be approved.

Note: If there is a **Faculty Sponsor** (FS) for the study, the FS Assurances must be completed ***before*** the study can be submitted.

Notify the FS by using the following activity: 

Study States

1. You can always track the progress of the study in the **Study Workspace.** The **Current State** is displayed in the upper left hand corner.



- ➢ The **Current State** and **Study History** are arranged in reverse chronological order in the bottom half of the screen.
- ➢ *Note*: Just after the study is approved by the IRB, you may notice that it briefly disappears from view on your homepage. This is a normal part of the process while webIRB makes a copy of the materials.