Investigator Guide

Migrating an IRBNet Study to eProtocol

PURPOSE:

This guide is designed to assist Principal Investigators (PIs) and their research staff:

- Understand the process for migrating an IRB-approved study from IRBNet to eProtocol.
- Locate the approved shell protocol and initiate the required amendment.
- Enter the most recently approved protocol information and current research personnel.
- Upload the approved IRBNet record and clean, unstamped study documents.
- Review and successfully submit the migration amendment for IRB review.

KEY DETAILS OF THE MIGRATION PROCESS

- The IRB office has created an approved shell protocol in eProtocol for each study migrated from IRBNet.
- The migration must be completed through an amendment to the approved shell protocol.
- PIs should not create a new protocol for this process.
- The eProtocol record should reflect the most recently approved IRBNet protocol version.
- Any additional changes requested during migration must be described in the amendment and reflected throughout the affected protocol sections and documents.
- Clean, unstamped versions of all current study documents must be uploaded for IRB review.

BEFORE YOU BEGIN

Prepare the following information and documents:

- The most recently approved IRBNet protocol and related approval materials.
- A current list of all co-investigators and other research personnel.
- Clean, unstamped versions of all current study documents.
- A description of any additional changes that require IRB review.

AMENDMENT SUBMISSION PROCESS

Follow the steps below to complete your approved shell protocol and submit the IRBNet-to-eProtocol migration amendment.

PART 1 – FINDING THE SHELL PROTOCOL

1. Open the Investigator Home Page

- Open the **Investigator** menu in eProtocol.
- Select **Investigator Home**.
- Open **Approved Protocols**.



2. Select the Approved Shell Protocol

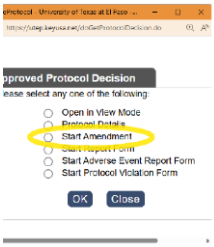
- Locate the shell protocol created for the migrated study.
- Select the corresponding **Protocol ID**.
- Confirm that the protocol title and principal investigator are correct.



If the shell protocol is missing or incorrect: Stop and contact the IRB office before creating a new record or making changes to another protocol.

3. Start the Amendment

- Select **Start Amendment**.
- Select **OK**.



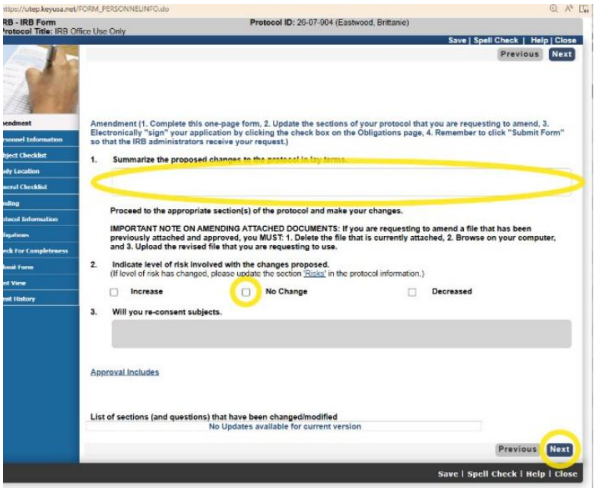
PART 2 – COMPLETING THE AMENDMENT PAGE

4. Describe the Amendment

In the amendment summary field, clearly state that the study is being converted from IRBNet. Include any other modifications you are requesting at the same time.

Suggested wording: "Convert approved study from IRBNet to eProtocol. Protocol information and current approved study documents have been entered based on the most recently approved IRBNet version. [Describe any additional changes, or state: No additional changes requested.]"

Answer the remaining amendment questions based on the actual changes being requested.

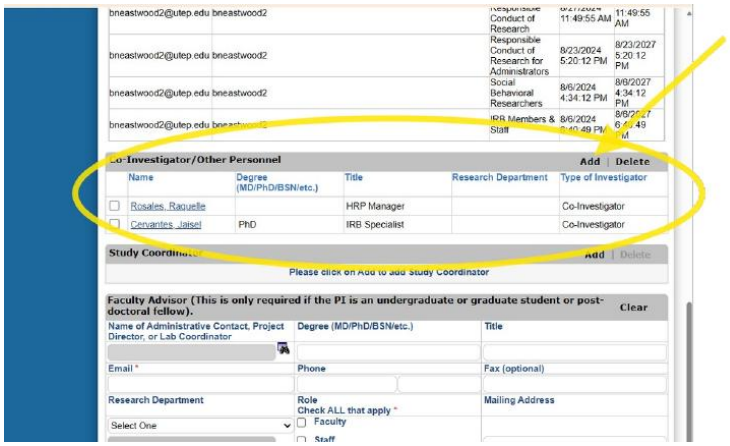


Keep the record consistent: If you request other changes during migration, describe them in the amendment summary and update every affected protocol section and document.

PART 3 – ADDING RESEARCH PERSONNEL

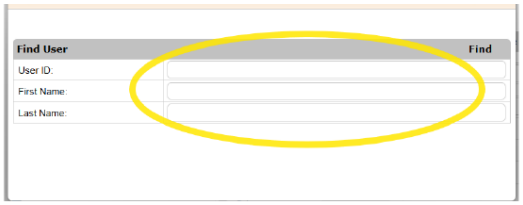
5. Open the Personnel Section

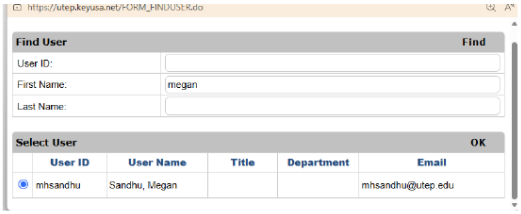
- Open **Personnel Information**.
- Scroll to **Co-Investigator/Other Personnel**.
- Select **Add**. Repeat this process for each person who should be listed on the study.



6. Search for the Person

- Select the **binoculars icon**.
- Search by user ID, first name, or last name.
- Select the correct person.
- Select **OK**.





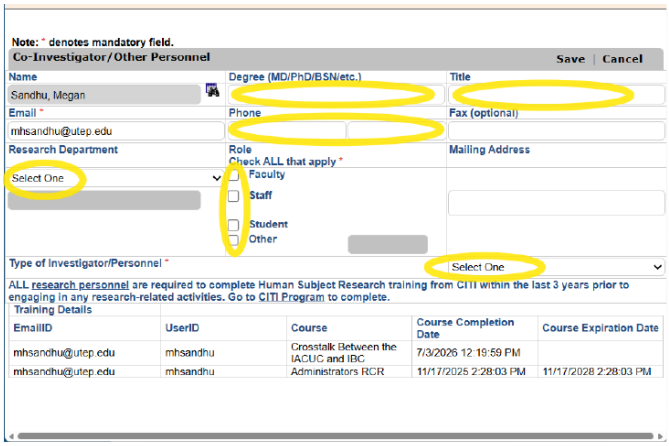
If the person cannot be found: Ask the person to sign in to eProtocol once. After the account is created in the system, search again. Do not substitute another person or enter an unverified identity.

7. Complete Personnel Information

Review the populated information and complete all required fields, including:

- Degree
- Title
- Phone number
- Research department
- Study role
- Type of investigator or personnel

Select every role that applies and save the entry.

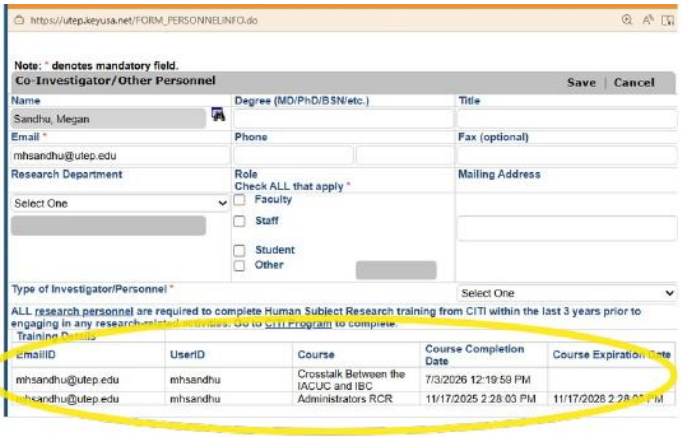


8. Verify CITI Training

Review the training information displayed for each person.

- Nursing, Pharmacy, & Allied Health Researchers Training, or
- Social Behavioral Research Training

If the information is missing or incorrect, ask the person to confirm that their CITI Program account uses their UTEP institutional email address.



> **Training troubleshooting:** Signing into eProtocol creates the user record. Using the UTEP institutional email in CITI helps the systems match the training record to the correct person. Contact the IRB office if the record remains incorrect after both items are confirmed.

PART 4 – COMPLETING THE PROTOCOL RECORD

9. Review Every Protocol Tab

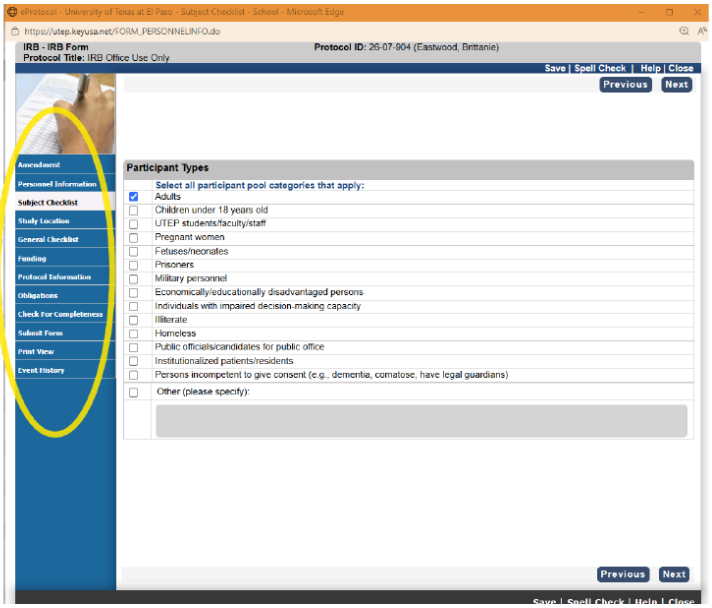
Complete every applicable section **using the most recently approved IRBNet protocol version.**

Review the following areas, as applicable:

- Personnel Information
- Subject Checklist
- Study Location
- General Checklist
- Funding

- Protocol Information
- Obligations

Save each section as you proceed.



PART 5 – UPLOADING SUPPORTING DOCUMENTS

10. Upload the Approved IRBNet Record

- Upload the most recently approved IRBNet protocol and related approval materials.
- The records may be combined into one PDF titled: **IRBNet Approval.pdf**

11. Upload Clean Study Documents

Upload clean, unstamped versions of each document that requires approval in eProtocol. Examples include:

- Consent, parental permission, and assent documents
- Recruitment materials, advertisements, emails, scripts, and flyers
- Surveys, questionnaires, interview guides, and data-collection instruments
- Information sheets or participant instructions
- Any other document used to conduct the study

Use current files only: Remove superseded drafts and avoid uploading stamped versions as the editable documents for future approval. Keep the IRBNet approval record as the historical source file.

PART 6 – REVIEWING AND SUBMITTING THE AMENDMENT

12. Final Quality Check

Confirm that:

- The correct shell protocol was used.
- The amendment summary states that the study is being converted from IRBNet.
- All current research personnel are listed.
- Personnel roles and required information are complete.
- CITI training information is visible, or any mismatch has been addressed.

- Every applicable protocol section is complete.
- The information matches the most recently approved IRBNet version.
- The approved IRBNet record is attached.
- Clean, unstamped versions of all current study documents are attached.
- Any additional changes requested are reflected throughout the amendment.

13. Submit the Amendment

- Select **Check for Completeness**.
- Resolve any missing required fields or errors.
- Review and save the completed amendment.
- Select **Submit Form**.

Saving the amendment does not submit it for IRB review.

After submission: Monitor eProtocol and your UTEP email for IRB questions or requests for clarification. Do not implement new changes described in the amendment until the IRB has approved them.

QUESTIONS? WE ARE HERE TO HELP!

If you have questions about the migration process, your shell protocol, or the required documents, please contact the UTEP IRB office for assistance at irb@utep.edu.