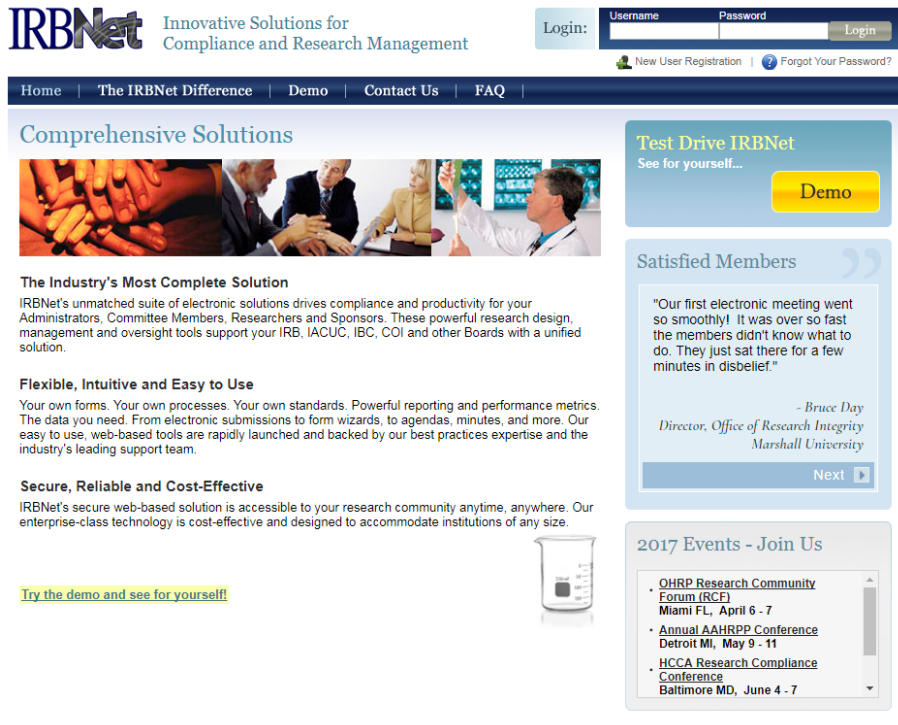


IRBNet Training Manual: Linking Training Credentials

Created by Will Baxley October 27, 2017

1. Log in to IRBNet [here](#)



IRBNet Innovative Solutions for Compliance and Research Management

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Comprehensive Solutions

The Industry's Most Complete Solution
IRBNet's unmatched suite of electronic solutions drives compliance and productivity for your Administrators, Committee Members, Researchers and Sponsors. These powerful research design, management and oversight tools support your IRB, IACUC, IBC, COI and other Boards with a unified solution.

Flexible, Intuitive and Easy to Use
Your own forms. Your own processes. Your own standards. Powerful reporting and performance metrics. The data you need. From electronic submissions to form wizards, to agendas, minutes, and more. Our easy to use, web-based tools are rapidly launched and backed by our best practices expertise and the industry's leading support team.

Secure, Reliable and Cost-Effective
IRBNet's secure web-based solution is accessible to your research community anytime, anywhere. Our enterprise-class technology is cost-effective and designed to accommodate institutions of any size.

[Try the demo and see for yourself!](#)

Test Drive IRBNet
See for yourself... [Demo](#)

Satisfied Members

"Our first electronic meeting went so smoothly! It was over so fast the members didn't know what to do. They just sat there for a few minutes in disbelief."
- Bruce Day
Director, Office of Research Integrity
Marshall University

2017 Events - Join Us

- OHRP Research Community Forum (RCF) Miami FL, April 6 - 7
- Annual AAHRPP Conference Detroit MI, May 9 - 11
- HCCA Research Compliance Conference Baltimore MD, June 4 - 7

2. Click on "User Profile" in the top right of the screen



USER PROFILE **LOGOUT**

Welcome to IRBNet
Mark Researcher

Help
My Projects
Create New Project
My Reminders (11)
Other Tools
Forms and Templates

My Projects

Your "My Projects" workspace shows projects that you have created and projects that have been shared with you by other users on the National Research Network. Use Reminders, Tags and Archiving to help organize your workspace and keep it running smoothly. ([Learn More](#))

Search: Search By Tag:

Search Clear

1 - 4 of 4

IRBNet ID	Project Title	Principal Investigator	Submission Type	Board Action	Effective Date
56892-1	Smile esthetic	Tabbaa	New Project	Pending Review	
56509-1	Test Project device new drug...	Schroder	New Project	Pending Review	
56493-1	Test Project 1 pi signature ...	Researcher	New Project	Approved	12/09/2016
56492-2	Test Project 2	Researcher	Amendment/Modification	Pending Review	

1 - 4 of 4

3. Scroll down and click “Add a New Training & Credentials Record

The screenshot shows a user profile page for 'Mark Researcher'. At the top, there is a link to 'Add an Additional Affiliation'. Below that, the user's current affiliation is listed as 'Researcher at Jacksonville University, Jacksonville, FL (E-IR) (Deactivate)' with the email 'irbdefault@mailinator.com'. The 'External Accounts' section is empty, with a link to 'Add an External Account'. The 'Training & Credentials' section contains a red circle around the 'Add a New Training & Credentials Record' link, with an arrow pointing to it from the right. Below this is a table with one entry:

Doc ID	Document Type	Description	Cr	Effective Date	Expiration Date	Last Modified	Status	
20013.1	CV/Resume	CV/docx		12/06/2016		12/06/2016 09:46 AM	Accepted	

At the bottom of the page, there is a copyright notice: 'Copyright © 2002-2017 Research Dataware. All Rights Reserved.'

4. Choose your NIH Training certificate for “Choose File,” and fill out the appropriate information where asterisked. Click “Attach”

The screenshot shows the 'Training & Credentials Record' form for 'Mark Researcher'. The form includes a sidebar with navigation links like 'My Projects', 'Create New Project', and 'My Reminders (11)'. The main form area has the following fields:

- Document Type: * (dropdown menu)
- Description: (text input)
- Credits/Credit Hours (if applicable): (text input)
- Effective Date: * (calendar icon)
- Expiration Date: (calendar icon)
- File: * (Choose File | No file chosen)

Arrows point to the asterisked fields: Document Type, Effective Date, and File. Below the form are 'Attach' and 'Cancel' buttons. A note at the bottom left of the form area says '* required fields'.

Note: After you upload your credential, it still must be approved by the IRB Administrator and may not immediately appear on your IRBNet profile.

5. Log into your project by clicking “My Projects” and selecting your project

Welcome to IRBNet Mark Researcher

My Projects

Your "My Projects" workspace shows projects that you have created and projects that have been shared with you by other users on the National Research Network. Use Reminders, Tags and Archiving to help organize your workspace and keep it running smoothly. (Learn More)

Search: Search By Tag:

Search Clear

1 - 5 of 5

IRBNet ID	Project Title	Principal Investigator	Submission Type	Board Action	Effective Date
57926-1	Test research	Baxley	Work in progress (Not submitted)		
56892-1	Simile esthetic	Tabbaa	New Project	Pending Review	
56509-1	Test Project device new drug...	Schroder	New Project	Pending Review	
56493-1	Test Project 1 pi signature ...	Researcher	New Project	Approved	12/09/2016
56492-2	Test Project 2	Researcher	Amendment/Modification	Pending Review	

1 - 5 of 5

6. Click “Share this Project” to add any other investigators

IRBNet ID: 57926-1

Welcome to IRBNet Mark Researcher

Project Administration

- Project Overview
- Designer
- Share this Project
- View this Package
- Submit this Package
- Delete this Package
- Send Project Mail
- Project History
- Messages & Alerts

Project Overview

[57926-1] Test research

You have Full access to this project. (1:411)

Research Institution Jacksonville University, Jacksonville, FL
Title Test research
Principal Investigator Baxley, Will, BM, BA

The documents for this project can be accessed from the Designer.

Project Status as of: 10/27/2017

Reviewing Board	Initial Approval Date	Project Status	Expiration Date
There is no Project Status information to display as of 10/27/2017.			

Package 57926-1 is: Work in progress

Submitted To	Submission Date	Submission Type	Board Action	Effective Date
This package has not been submitted.				

Shared with the following users:

User	Organization	Access Type
Researcher, Mark	Jacksonville University, Jacksonville, FL	Full

7. Click “Share”

IRBNet ID: 57926-1 USER PROFILE LOGOUT

Welcome to IRBNet Mark Researcher

[57926-1] Test research

You may share this project with other Researchers, Committee Members, Administrators and Sponsors. You may also send a complete copy of this project to a Principal Investigator at another site if this is a multi-site project. You may also transfer ownership of this project to another individual.

- **Share:** Use this option if you wish to share your project with other Researchers, Committee Members, Administrators or Sponsors at your own institution or any other institution. For example, you may wish to share this project with other members of your research team so that you may collaborate in the design and development of the project, or with a selected Committee Member or Administrator to solicit feedback prior to submitting your project for review. You may provide any individual with **Full**, **Write** or **Read** access.
- **Multi-site:** Use this option only if your project is a multi-site project and you wish to send a complete and independent copy of this project to a Principal Investigator at another site. The local Principal Investigator will be able to obtain project documents from the lead site and may modify their copy of these documents (such as consent forms) to meet the requirements of their local Board. You will be able to monitor the progress of this project at every local site. The other local Principal Investigators will also be able to monitor the progress of this project at every local site (including your own).
- **Transfer:** Transfer your ownership of this project to another user. In doing so you will relinquish all access to this project and the designated user will be granted **Full** access.

Project Administration

- Project Overview
- Designer
- Share this Project
- Sign this Package
- Submit this Package
- Delete this Package
- Send Project Mail
- Project History

Messages & Alerts

Other Tools

- Forms and Templates

8. Select Jacksonville University and click “Select Organization”

IRBNet ID: 57926-1 USER PROFILE LOGOUT

Welcome to IRBNet Mark Researcher

[57926-1] Test research

You may share this project with other users. Sharing a project consists of three steps:

1. Select an organization to display a list of users at that organization.
2. Specify the access that you wish to grant each user at that organization.
3. Save your changes.

Search for an Organization [Search] [Clear]

Organization types to display Research Institutions Boards Sponsors [Display]

Select an Organization*

- Inventum Technologies Inc, Columbia, MD
- Iowa Western Community College, Council Bluffs, IA
- IRB Advisor, Belleville, IL
- IRB ME, Anywhere, OR
- Ireland Army Community Hospital (IACH), Fort Knox, KY
- IU Health Ball Memorial Hospital, Muncie, IN
- IU Health Bloomington , Bloomington, IN
- Jacksonville University, Jacksonville, FL

[Select Organization]

* required fields

- Find the researchers you are looking to add (you will have to scroll down probably) and select the level of privileges you want to grant each. Click “save”

IRBNet ID: 57926-1

USER PROFILE LOGOUT

Welcome to IRBNet
Mark Researcher

Share Project

[57926-1] Test research

Specify the access that you wish to grant to each user at Jacksonville University. You should grant each user only the minimum level of access necessary to perform their work on this project.

- Signature Only (Read):** Users whose only role is to sign off on project documentation should be granted "Read" access. Users with Read access can view project documentation, communicate with the project team and add their signature. This would typically include advisors, department heads, and other individuals who are required to sign off on the project documentation prior to submission but do not otherwise have a day-to-day role on the project.
- Read:** Users that are granted "Read" access can view project documentation, collaborate with other users and add their signature, but may not edit project documents or perform any other administrative functions.
- Write:** Users that are granted "Write" access can view and edit project documents, collaborate with other users and add their signature, but may not grant access to other users, submit packages for review or perform any other administrative functions.
- Full:** Users that are granted "Full" access can perform all functions without restriction. This includes editing project documents, sharing the project with other users, submitting document packages for review and deleting document packages. Only Project Owners with day-to-day responsibility for the project should be granted Full access. Users with Full access will receive automatic email copies of all project notifications and alerts that are sent to the Project Owners.

User	Full	Write	Read	No Access
Researcher, Dan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Researcher, Eleanor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Schroder, Rebecca	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Wang, Shu nu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

4 Users found, displaying all Users.

Each user will be automatically notified that they have been granted access to this project. You may also specify additional comments to be included in this notification:

Your Comments

Save Cancel

Note: If one of your investigators is not showing up on this list, it means that they have not created an account on IRBNet yet.

- Go to the Designer tab of your project

IRBNet ID: 57926-1

USER PROFILE LOGOUT

Welcome to IRBNet
Mark Researcher

Project Overview

[57926-1] Test research

You have Full access to this project. (Full)

Research Institution Jacksonville University, Jacksonville, FL

Title Test research

Principal Investigator Baxley, Will, BM, BA

The documents for this project can be accessed from the Designer.

Project Status as of: 10/27/2017

Reviewing Board	Initial Approval Date	Project Status	Expiration Date
There is no Project Status information to display as of 10/27/2017.			

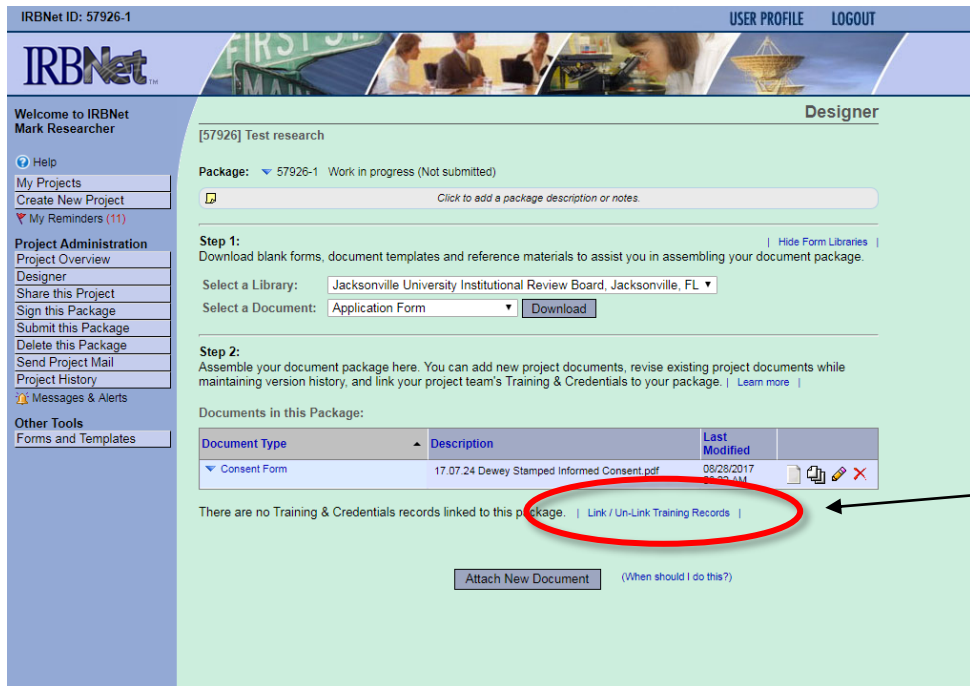
Package 57926-1 is: Work in progress

Submitted To	Submission Date	Submission Type	Board Action	Effective Date
This package has not been submitted.				

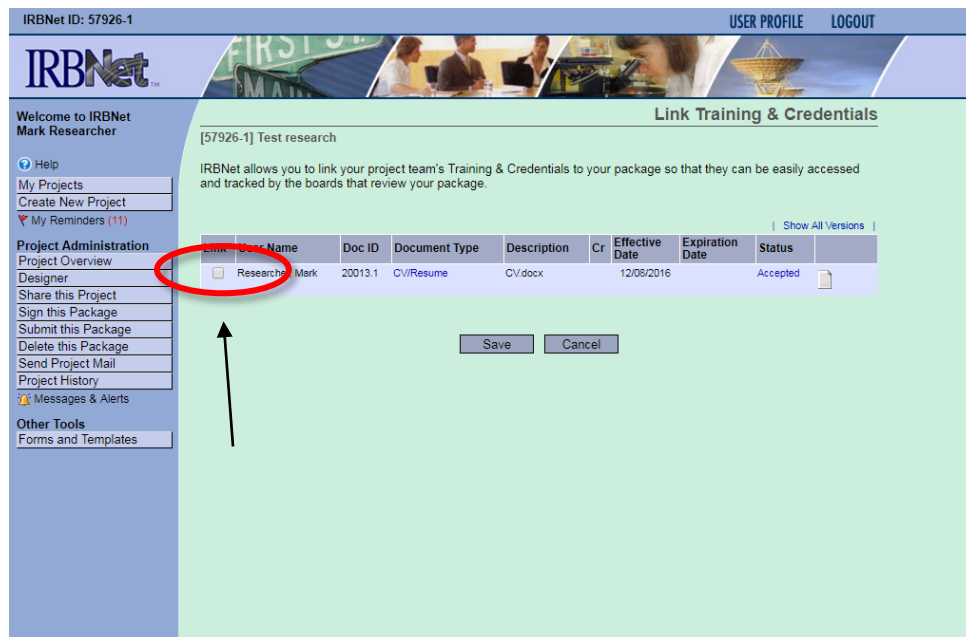
Shared with the following users:

User	Organization	Access Type
Researcher, Mark	Jacksonville University, Jacksonville, FL	Full

11. Click “Link / Un-Link Training Records



12. Check the box next to the name of each investigator to “Link” the credential.
Click Save



Note: If one of your investigators is not showing up on this list, it means that they have not uploaded their training credentials to IRBNet. They must follow steps 1 through 4 of this manual to upload their credential and then you will be able to check them.