V 2.0

UT Health San Antonio | Enterprise Research Management System (ERMS)

UT IRB Study Submission Quick-Guide

Dashboard | Agreements | COI | IRB

The circled numbers correspond to the relevant pages below:

Validate | Compare

3 Basic Study Information

4 Study Funding Sources

5 Local Study Team Members

6 Study Scope

7 Local Research Locations

8 Local Site Documents

The following guide will instruct the reader how to create a study using our system.

1. Navigate to the **IRB Tab** located at the top of the page.

IRB

2. Select the **Create New Study** button:

Create New Study

3 Complete the **Basic Study Information** fields. Upload the protocol here.

* fields are <u>mandatory</u>

Continue

4 Identify any **Study Funding Sources**. If no funding, you may proceed.

Continue

5 Add the **Local Study Team Members** (Research Team Members) who will be participating in this study by selecting the +Add button:

+ Add

Note: If you wish to add a Research Team Member as a **PI Proxy**, this personnel must be listed as a **Local Study Team Member**

6 Complete the **Study Scope** to identify if your study involves a **Drug/Device**. Attach Drug and Device documentation.

Continue

7 Add additional **Local Research Locations** relevant to the study (e.g. UH, VA, UT or MCC).

+ Add

8 Attach **Local Site Documents**. For example, **Consent forms** and **Recruitment materials**. Other than the protocol and Drug/Device forms, remaining documentation is uploaded here.

+ Add

9. Select Finish .

IMPORTANT: Continue to the next page to add PI Proxies and Submit the study.

Need Help?

By selecting the Help button, additional help text will be provided. This button can be located on any page.

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Next Steps

Dashboard | Agreements | COI | IRB

Pre-Submission

Next Steps

Edit Study

Printer Version

- Submit
- Assign PI Proxy
- Manage Ancillary Reviews
- Manage Guest List
- Add Related Grant
- Manage Related Agreements
- Create Ad Hoc Certifications
- Add Comment
- Discard
- Manage Tags

Submit

Once all applicable information has been provided, and a Contact/PI Proxy has been assigned, you may now submit your study.

Edit Study

If you feel something has been incorrectly filled out, or a person was not added, this will allow you to revise your application prior to submission.

Adding a PI Proxy

This function will allow the addition of a **PI Proxy**. A **PI Proxy** has the ability to act on behalf of the PI. Only a PI or a **PI Proxy** may submit a study.

Note: If you wish to add an individual as a **PI Proxy**, this person <u>must</u> be listed as a **Local Study Team Member**

Manage Guest List

Using this feature will allow added personnel to view the submission and its status.

Note: This feature is different from a **PI Proxy**

Need Help?

The Help button is also present within the Next Steps fields shown on the left. Once accessed, clicking the button will provide additional help text!