



## **IRB ASSISTANT**

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### *List Maintenance*

Software Version: 13.01

Manual Version: P1

Manual Published: 7/12/2021

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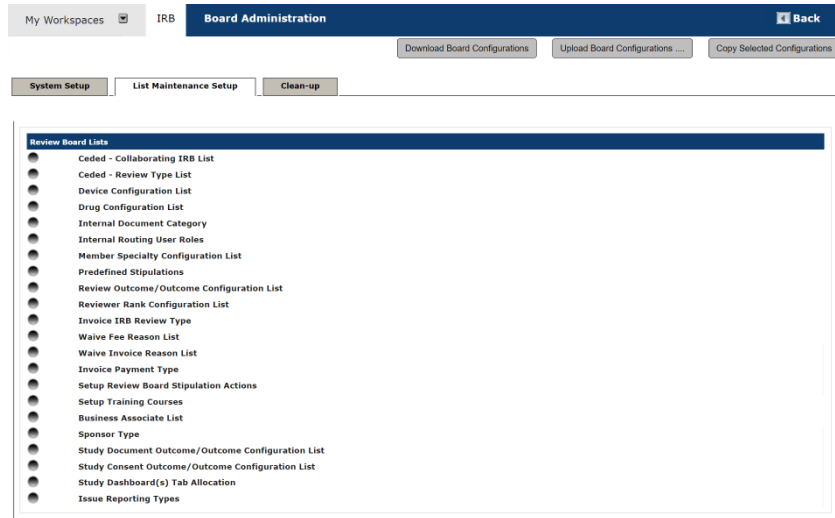
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## Introduction

The iRIS™ system provides numerous picklists on system pages and forms. Some of these lists exist to save users the time and trouble of manually typing in frequently used data items. Other lists exist to enforce data validation requirements.

Lists are managed on the **List Maintenance Setup** tab. To access this area navigate to IRB Assistant > Review Board Administration > **List Maintenance Setup** tab.



This manual provides details of list configuration processes and settings, and where applicable, information about where the configured lists are employed in the iRIS™ system.

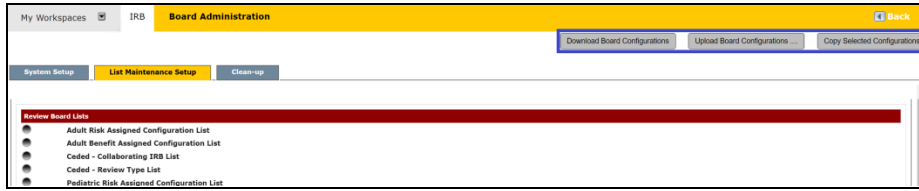
## Tools for Copying Board Configuration

The iRIS™ system provides tools for duplication of an existing review board's configuration files to serve two different scenarios:

**Download / Upload Board Configurations** — create an identical board on a new server / in a new installation of the iRIS™ software

**Copy Selected Configurations** — create a new board on the same server / in an existing installation of the iRIS™ software with the same configuration settings as the source board

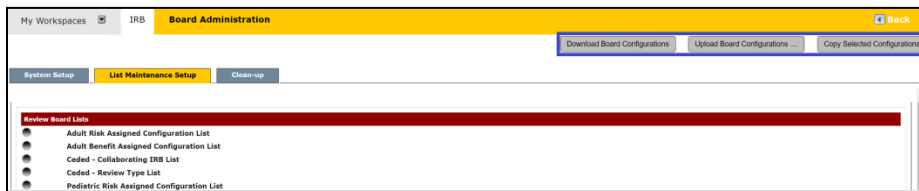
As shown in the screenshot below, both options are accessed via buttons on the **List Maintenance Setup** tab under IRB Assistant > Review Board Administration.



Note that these tools are only intended to be made available to full System Administrators (as opposed to those assigned to an Administrator role within a specific iRIS™ module) to help with initial setup of iRIS™ servers and new review boards.

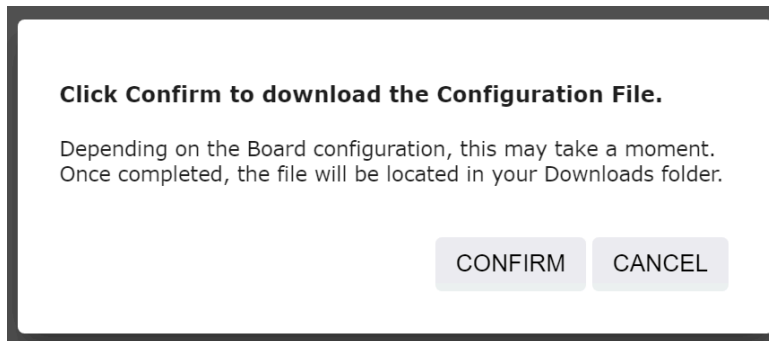
## Download/Upload Board Configurations

**Download/Upload Board Configurations** is a tool that allows full System Administrators (as opposed to those assigned to an Administrator role within a specific iRIS™ module) to duplicate a fully configured review board from one iRIS™ system to another, such as when setting up a new server at a new facility within the same umbrella institution, in order to avoid errors and save the time and effort of manually keying in all the same data for a new board.



**CAUTION: Download/Upload Configurations** should not be used in a live iRIS™ system. iMedRIS recommends performing a board configuration copy to a destination review board only once.

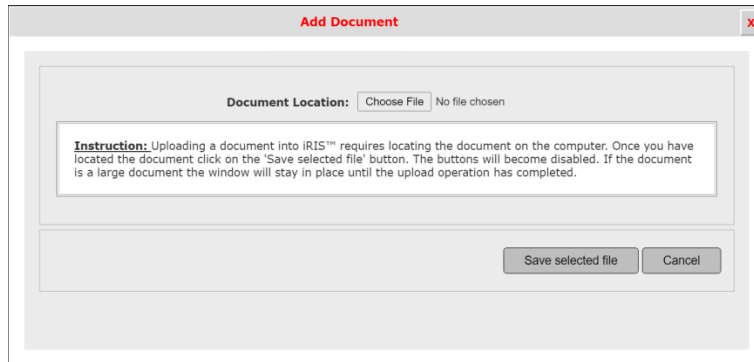
IN THE SOURCE iRIS™ SYSTEM: Click the **Download Board Configurations** button to download a file containing configuration settings for the currently selected IRB review board. A confirmation popup displays, as shown below.



Click **CANCEL** to close the popup without downloading the configuration file.

Click **CONFIRM** to complete the download. Note that as the popup indicates, the file is saved to the local computer's Downloads folder.

ON THE TARGET iRIS™ SYSTEM: Copy the downloaded configuration file to the computer where the target iRIS™ system is installed. Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Upload Board Configurations** button.



Click **Cancel** to close the popup without uploading the file.

Click **Save** selected file and follow the prompts to locate the file and upload it. Installation completes automatically.

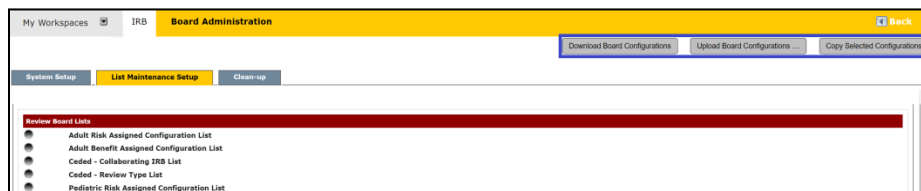
## Copy Configurations

**Copy Configurations** is a tool that allows an iRIS™ system administrator to copy pre-existing, fully configured review board elements into a different, newly created review board within the same iRIS™ system in order to avoid errors and save the time and effort of manually keying in all the same data for a new board.

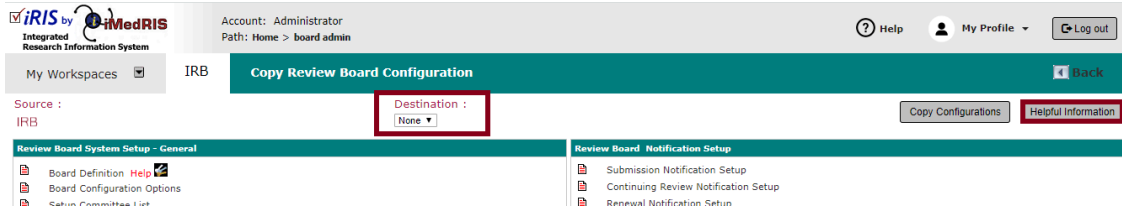
**CAUTION: Copy Configurations** should not be used after setup of review boards is complete, nor in a live iRIS™ system. iMedRIS recommends performing a board configuration copy to a destination review board only once.

Note that configurations cannot be copied across review boards of different types (IRB to IBC, IRB to ARC, etc.). Within IRB Assistant it is only possible to copy configurations across IRB review boards.

Click the **Copy Configurations** button to copy a pre-existing IRB review board configuration to another IRB review board.



The **Copy Review Board Configuration** page displays. The page contains links to configurations that can be copied to another review board. Note the **Destination** dropdown list at the top center of the page, and the **Helpful Information** button at right. The **Copy Configurations** button is non-functional until the **Destination** and at least one configuration item are selected (details follow below).



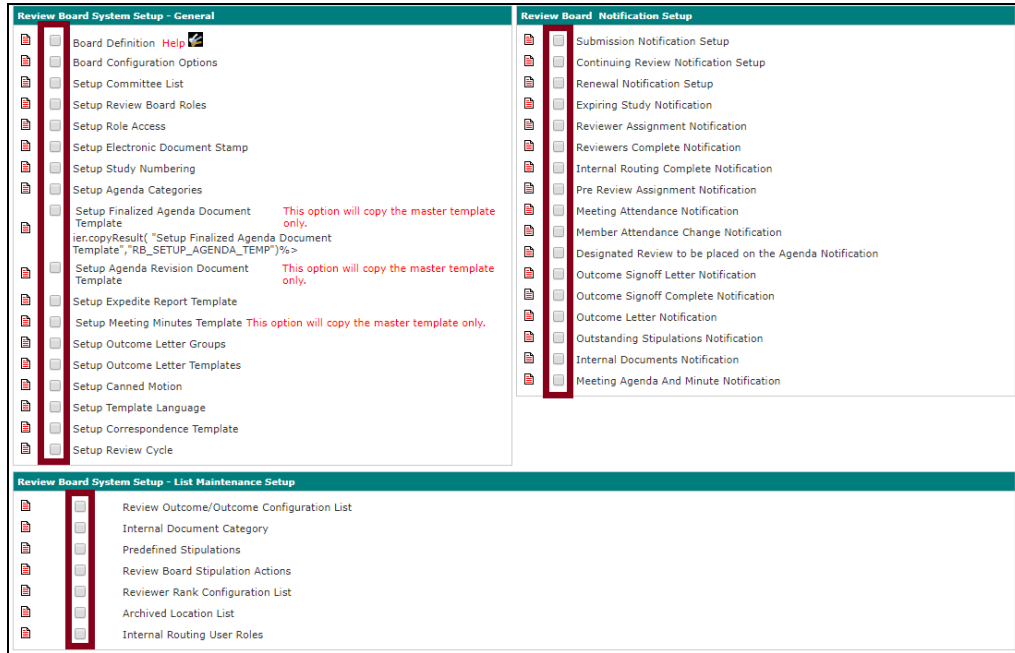
Click the **Helpful Information** button to view a popup containing important information and warnings about copying review board configurations.



Click the close window button in the upper right corner (marked with a red asterisk) to close the popup.

Back on the **Copy Review Board Configuration** page, select the target review board from the **Destination** dropdown list at the top of the page. The configuration **Source** is shown at the upper left, indicating the review board that is currently active. Only review boards of the same type will populate in the **Destination** dropdown list.

Select boxes for applicable configuration items in the setup lists are now available.

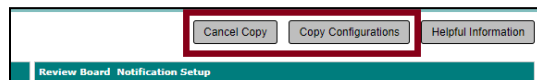


Select the configuration item(s) to be copied to the selected destination by clicking the respective checkbox(es).

Note that the following configuration items of the **Source** board cannot be copied:

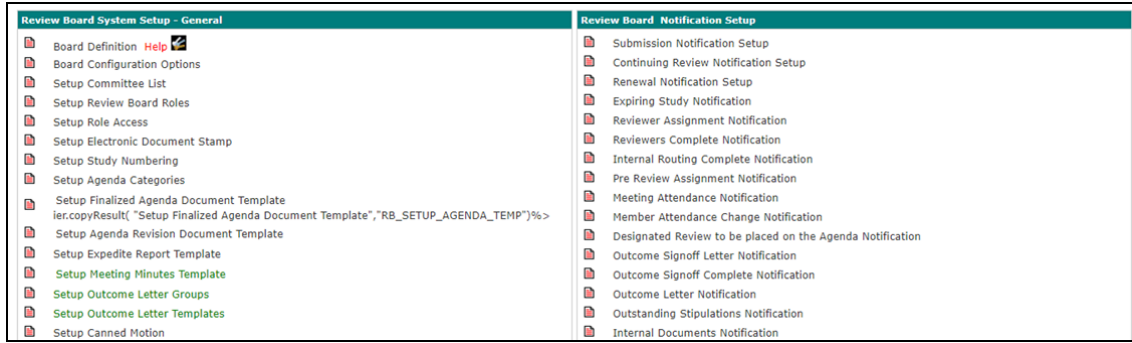
- Board Definition
- Setup Review Board Roles
- Role Access
- Setup Correspondence Template
- Review Cycle
- Study Status Configuration List

Click the **Copy Configurations** button to complete the copy process. Click the **Cancel Copy** button to cancel the process without saving changes.



When the **Copy Configurations** button is clicked the copy process completes, and the **Copy Review Board Configuration** page refreshes.

*Items where there is no data to copy, or where the corresponding field is not turned on in the destination review board, are not copied to the **Destination** review board.*

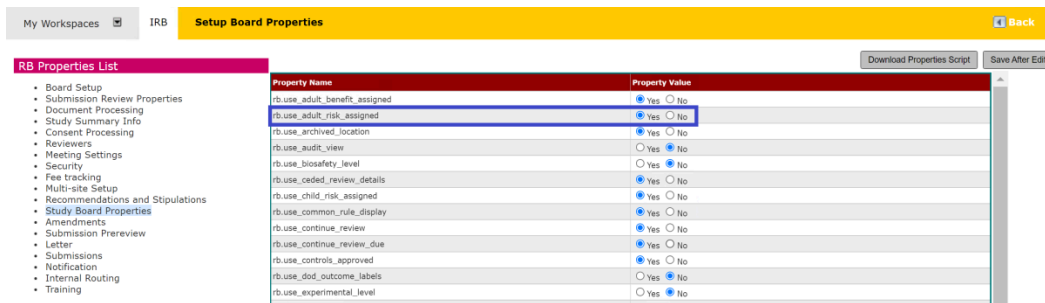


As demonstrated above, any items successfully copied are color coded with green text. Items that did not copy successfully are color coded with red text.

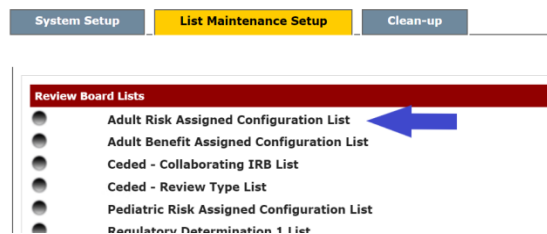
*Note: When performing a review board configuration copy from one board to another, fields that were originally pre-populated in the destination board are overwritten with data copied from the source board.*

## Adult Risk Assigned Configuration List

Where the property `rb.use_adult_risk_assigned` is set to “Yes” (under IRB Assistant > Review Board Administration > Board Configuration Options > Study Board Properties, see screenshot below), the iRIS™ system allows for setup and maintenance of an **Adult Risk Assigned Configuration List**. The list contains current risk ratings the review board can assign to rate potential risk to adults accrued from participation in a particular study.



Setting the property to “Yes” populates an **Adult Risk Assigned Configuration List** link on the List Maintenance Setup tab, as shown in the example below.



Click the link to open the **Setup Adult Risk Assigned List** page, shown below.

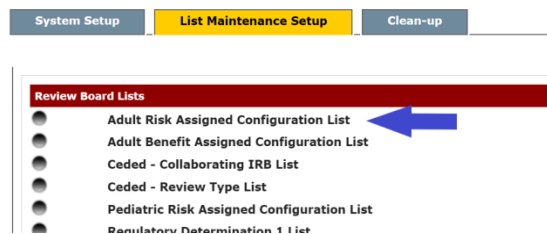
Order Number	Adult Risk	Adult Risk Description
1	minimal	The research involves no more than minimal risk to subjects.
2	minor increase over minimal	The research involves a minor increase over minimal risk to subjects.
3	> minor increase over minimal	The research involves more than a minor increase over minimal risk to subjects.
4	N/A	N/A

The page lists all previously configured adult risk assignments and provides controls for creating, revising and deleting adult risk assignment records.

The list defined here is used to populate the dropdown picklist for the **Adult Risk Assigned** field, which appears in both the **Outcome** tab (shown below) and Study Summary screen (not shown).

### Add Adult Risk Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Adult Risk Assigned Configuration List** link.



As shown below, the **Setup Adult Risk Assigned List** page opens.

Order Number	Adult Risk	Adult Risk Description
1	minimal	The research involves no more than minimal risk to subjects.
2	minor increase over minimal	The research involves a minor increase over minimal risk to subjects.
3	> minor increase over minimal	The research involves more than a minor increase over minimal risk to subjects.
4	N/A	N/A

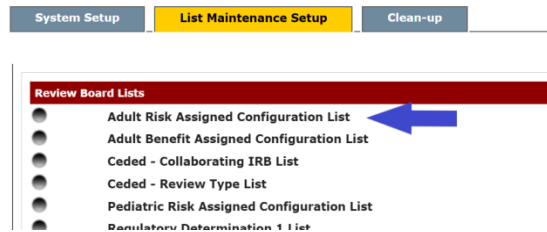
Click the **Add an Adult Risk** button (blue box in screenshot above). An add form opens, as shown below.

**Order Number** defaults to “1” (one), meaning that this entry will appear at the top of the list on the **Setup Adult Risk Assigned List** page when saved. The field is unlocked, allowing for entry of a different **Order Number**. If a duplicate **Order Number** is entered here the list is automatically reordered, with the new item taking precedence.

Enter desired text for **Adult Risk** and **Adult Risk Description**, and click the **Save Adult Risk** button. The add form closes and the new **Adult Risk** is added to the list on the **Setup Adult Risk Assigned List** page.

### Edit Adult Risk Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Adult Risk Assigned Configuration List** link.



As shown below, the **Setup Adult Risk Assigned List** page opens.

	Edit	Order Number	Adult Risk	Adult Risk Description
<input type="checkbox"/>		1	minimal	The research involves no more than minimal risk to subjects.
<input type="checkbox"/>		2	minor increase over minimal	The research involves a minor increase over minimal risk to subjects.
<input type="checkbox"/>		3	> minor increase over minimal	The research involves more than a minor increase over minimal risk to subjects.
<input type="checkbox"/>		4	N/A	N/A

Click the applicable icon in the **Edit** column (blue box in screenshot above). The selected record opens in an edit form, as shown below.

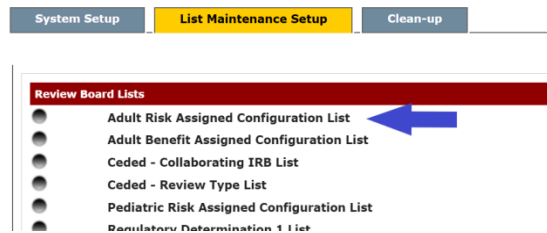
Make desired changes to **Order Number**, **Adult Risk** and **Adult Risk Description**.

If a duplicate **Order Number** is entered here the list is automatically reordered when changes are saved, with the new item taking precedence.

Click the **Save Adult Risk** button. The edit form closes and the **Adult Risk** is revised in the list on the **Setup Adult Risk Assigned List** page.

### Delete Adult Risk Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Adult Risk Assigned Configuration List** link.

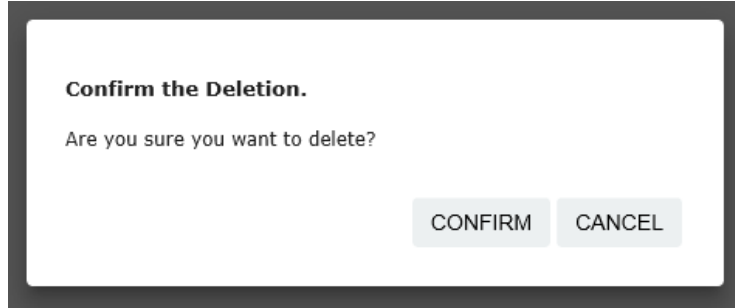


As shown below, the **Setup Adult Risk Assigned List** page opens.

Edit	Order Number	Adult Risk	Adult Risk Description
<input type="checkbox"/>	1	minimal	The research involves no more than minimal risk to subjects.
<input type="checkbox"/>	2	minor increase over minimal	The research involves a minor increase over minimal risk to subjects.
<input type="checkbox"/>	3	> minor increase over minimal	The research involves more than a minor increase over minimal risk to subjects.
<input type="checkbox"/>	4	N/A	N/A

Click to select the checkboxes of the item(s) to be deleted in the far left column and click the **Delete Selected Adult Risk(s)** button (blue boxes in screenshot above).

A confirmation popup window displays.

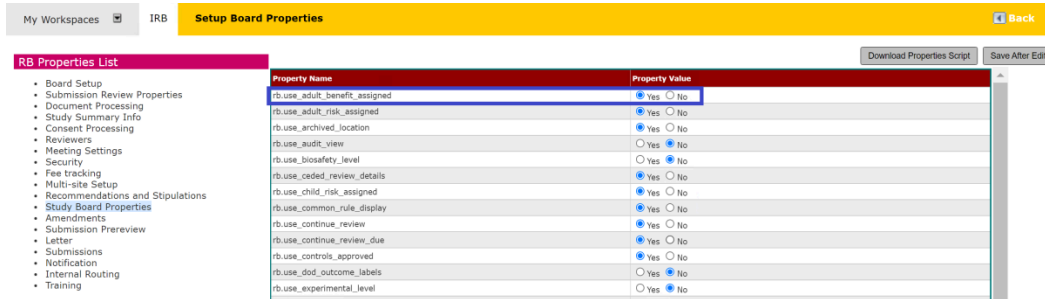


Click **CANCEL** to close the popup without deleting the record.

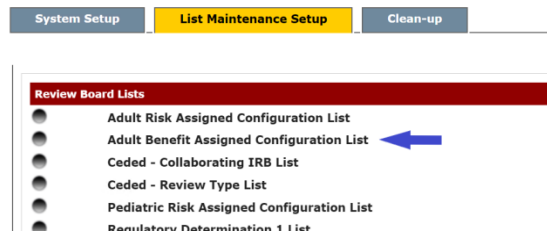
Click **CONFIRM** to complete deletion of the record. The item is deleted from the list on the **Setup Adult Risk Assigned List** page.

## Adult Benefit Assigned Configuration List

Where the property `rb.use_adult_benefit_assigned` is set to “Yes” (under IRB Assistant > Review Board Administration > Board Configuration Options > Study Board Properties), the iRIS™ system allows for setup and maintenance of an **Adult Benefit Assigned Configuration List**. The list contains current benefit ratings the review board can assign to rate potential benefits to adults accrued from participation in a particular study.



Setting the property to “Yes” populates an **Adult Benefit Assigned Configuration List** link on the List Maintenance Setup tab, as shown in the example below.



Click the link to open the **Setup Adult Benefit Assigned List** page, shown below.

My Workspaces ▾ IRB **Setup Adult Benefit Assigned List** [Back](#)

[Add an Adult Benefit](#) [Delete Selected Adult Benefit\(s\)](#)

<input type="checkbox"/>	Edit	Order Number	Adult Benefit	Adult Benefit Description
<input type="checkbox"/>		1	knowledge of condition w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects but is likely to yield generalizable knowledge about the subject's disorder or condition.
<input type="checkbox"/>		2	societal understanding w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge to further society's understanding of the disorder or condition under study.
<input type="checkbox"/>		3	prospect of direct benefit	The research involves the prospect of direct benefit.
<input type="checkbox"/>		4	N/A	N/A

The page lists all previously configured adult benefit assignments and provides controls for creating, revising and deleting adult benefit assignment records.

The list defined here is used to populate the dropdown picklist for the **Adult Benefit Assigned** field, which appears in both the **Outcome** tab (shown below) and Study Summary screen (not shown).

Recommendation
Stipulation
Internal Submission Routing
Expedited by
<b>Outcome</b>
Outcome Letter

<b>Adult Benefit Assigned:</b>	<input type="text" value="--none--"/>
<b>Pediatric Risk Assigned:</b>	<input type="text" value="knowledge of condition w/ no direct benefit"/>
<b>Exempt:</b>	<input type="checkbox"/>
<b>Non-Human Subject Research (NHSR) :</b>	<input type="radio"/> Yes <input type="radio"/> No

### Add Adult Benefit Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Adult Benefit Assigned Configuration List** link.

System Setup | **List Maintenance Setup** | Clean-up

**Review Board Lists**

- Adult Risk Assigned Configuration List
- **Adult Benefit Assigned Configuration List** ←
- Ceded - Collaborating IRB List
- Ceded - Review Type List
- Pediatric Risk Assigned Configuration List
- Regulatory Determination 1 List

As shown below, the **Setup Adult Benefit Assigned List** page opens.

My Workspaces ▾ IRB **Setup Adult Benefit Assigned List** [Back](#)

[Add an Adult Benefit](#) [Delete Selected Adult Benefit\(s\)](#)

<input type="checkbox"/>	Edit	Order Number	Adult Benefit	Adult Benefit Description
<input type="checkbox"/>		1	knowledge of condition w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects but is likely to yield generalizable knowledge about the subject's disorder or condition.
<input type="checkbox"/>		2	societal understanding w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge to further society's understanding of the disorder or condition under study.
<input type="checkbox"/>		3	prospect of direct benefit	The research involves the prospect of direct benefit.
<input type="checkbox"/>		4	N/A	N/A

Click the **Add an Adult Benefit** button (blue box in screenshot above). An add form opens, as shown below.

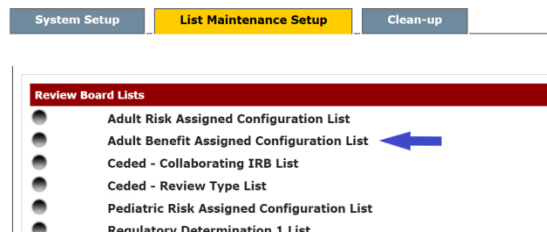
**Order Number** defaults to “1” (one), meaning that this entry will appear at the top of the list on the **Setup Adult Benefit Assigned List** page when saved. The field is unlocked, allowing for entry of a different **Order Number**.

If a duplicate **Order Number** is entered here the list is automatically reordered, with the new item taking precedence.

Enter desired text for **Adult Benefit** and **Adult Benefit Description**, and click the **Save Adult Benefit** button. The add form closes and the new **Adult Benefit** is added to the list on the **Setup Adult Benefit Assigned List** page.

### Edit Adult Benefit Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Adult Benefit Assigned Configuration List** link.



As shown below, the **Setup Adult Benefit Assigned List** page opens.

Order Number	Adult Benefit	Adult Benefit Description
1	knowledge of condition w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects but is likely to yield generalizable knowledge about the subject's disorder or condition.
2	societal understanding w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge to further society's understanding of the disorder or condition under study.
3	prospect of direct benefit	The research involves the prospect of direct benefit.
4	N/A	N/A

Click the applicable icon in the **Edit** column (blue box in screenshot above). The selected record opens in an edit form, as shown below.

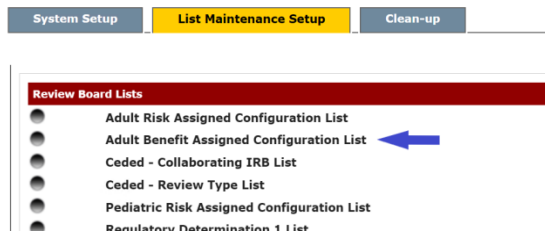
Make desired changes to **Order Number**, **Adult Benefit** and **Adult Benefit Description**.

If a duplicate **Order Number** is entered here the list is automatically reordered when changes are saved, with the new item taking precedence.

Click the **Save Adult Benefit** button. The edit form closes and the **Adult Benefit** is revised in the list on the **Setup Adult Benefit Assigned List** page.

### Delete Adult Benefit Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Adult Benefit Assigned Configuration List** link.

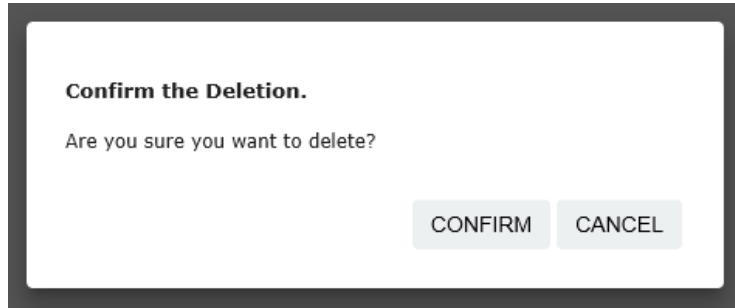


As shown below, the **Setup Adult Benefit Assigned List** page opens.

Edit	Order Number	Adult Benefit	Adult Benefit Description
<input type="checkbox"/>	1	knowledge of condition w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects but is likely to yield generalizable knowledge about the subject's disorder or condition.
<input type="checkbox"/>	2	societal understanding w/ no direct benefit	The research involves no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge to further society's understanding of the disorder or condition under study.
<input type="checkbox"/>	3	prospect of direct benefit	The research involves the prospect of direct benefit.
<input type="checkbox"/>	4	N/A	N/A

Click to select the checkboxes of the item(s) to be deleted in the far left columns and click the **Delete Selected Adult Benefit(s)** button (blue boxes in screenshot above).

A confirmation popup window displays.

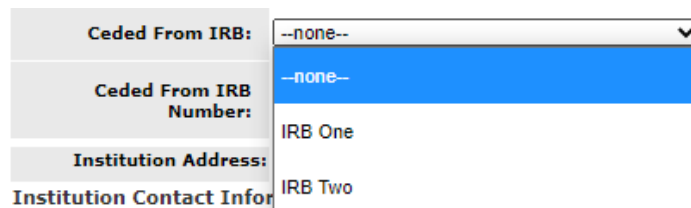
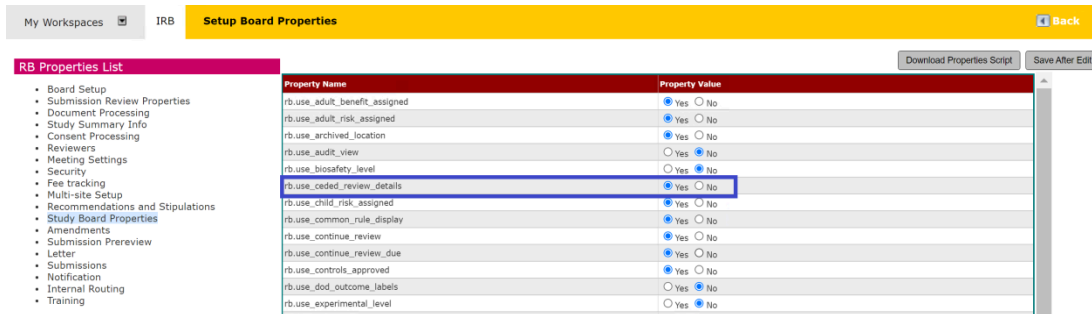


Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The item is deleted from the list on the **Setup Adult Benefit Assigned List** page.

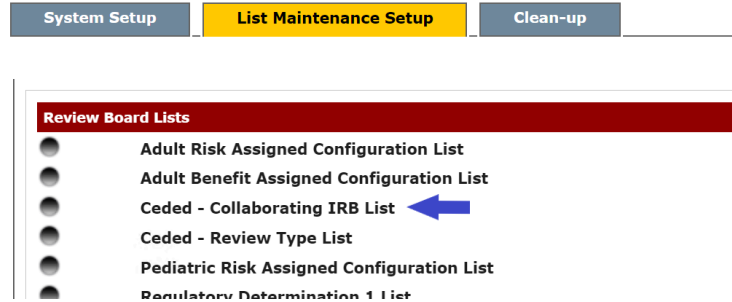
## Ceded – Collaborating IRB List

Where the property `rb.use_ceded_review_details` is set to “Yes” (under IRB Assistant > Review Board Administration > Board Configuration Options > Study Board Properties), the iRIS™ system allows for setup and maintenance of a **Collaborating IRB List**: a dropdown list of organizations provided in the **Ceded to IRB** field on the **Outcome** tab of a submission, as demonstrated below.

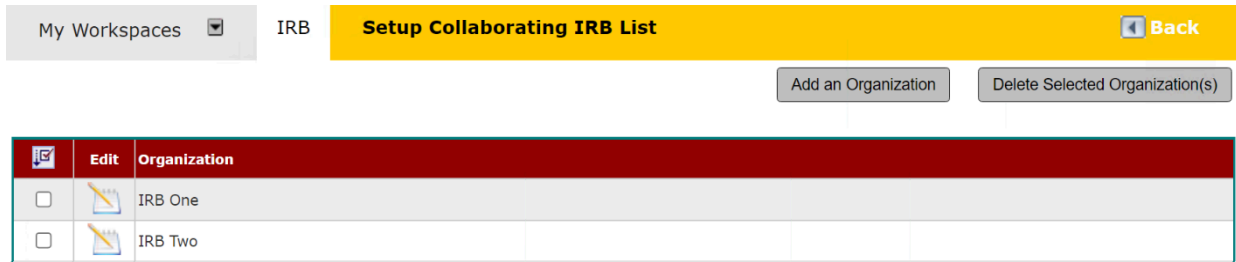


This field populates in the **Outcome** tab when the user indicates that the study has been ceded from or to another organization.

Setting the property to “Yes” populates a **Ceded - Collaborating IRB List** link on the **List Maintenance Setup** tab, as shown in the example below.



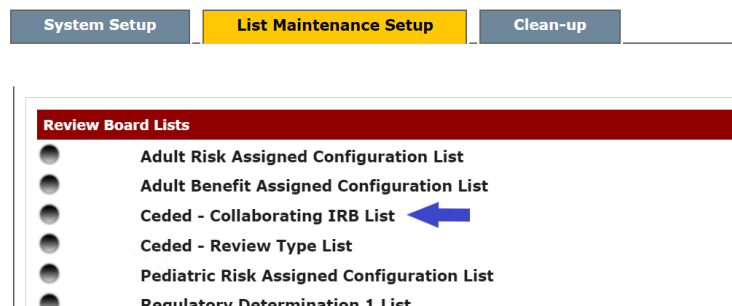
Clicking the link opens the **Setup Collaborating IRB List** page, shown below.



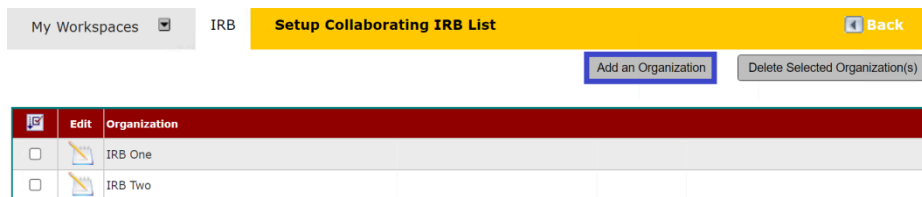
The page lists all previously configured **Collaborating IRB** records and provides controls for creating, revising and deleting **Collaborating IRB** records.

## Add Collaborating IRB Organization

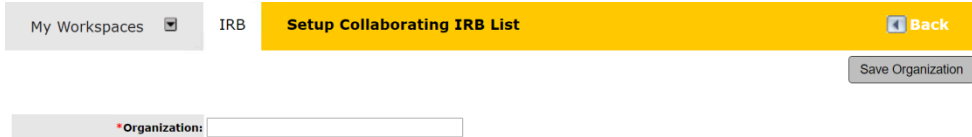
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Ceded – Collaborating IRB List** link.



As shown below, the **Setup Collaborating IRB List** page opens.



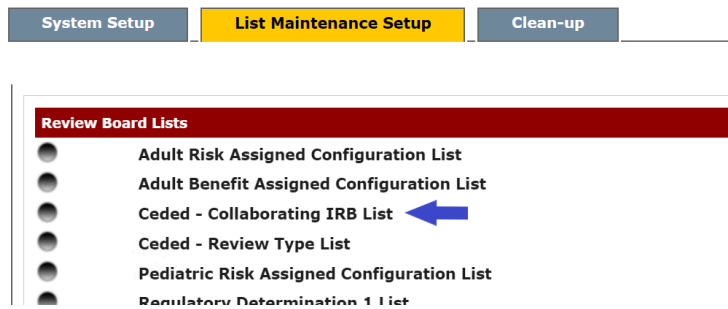
Click the **Add an Organization** button (blue box in screenshot above). An add form opens, as shown below.



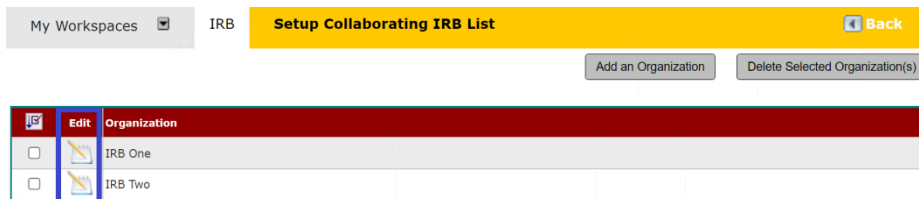
Enter the desired text for the new **Organization** and click the **Save Organization** button. The add form closes and the new **Organization** is added to the list on the **Setup Collaborating IRB List** page.

### Edit Collaborating IRB Organization

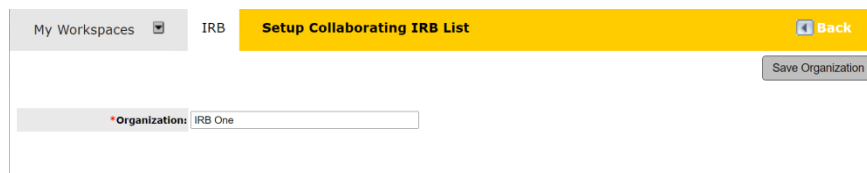
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Ceded – Collaborating IRB List** link.



As shown below, the **Setup Collaborating IRB List** page opens.



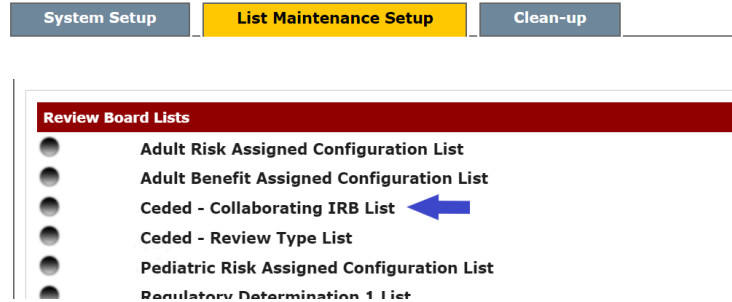
Click the applicable icon in the **Edit** column (blue box in screenshot above). The applicable record is opened in an edit form, as shown below.



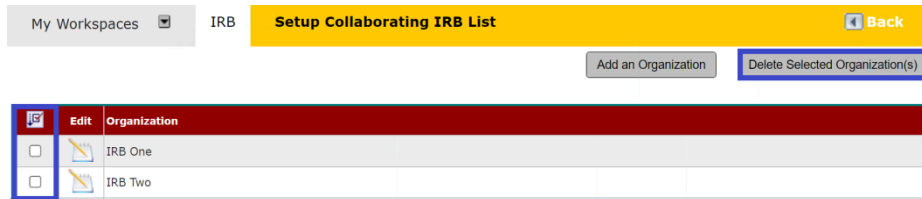
Revise text for the **Organization** as desired and click the **Save Organization** button. The edit form closes and the **Organization** is revised in the list on the **Setup Collaborating IRB List** page.

### Delete Collaborating IRB Organization

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Ceded – Collaborating IRB List** link.

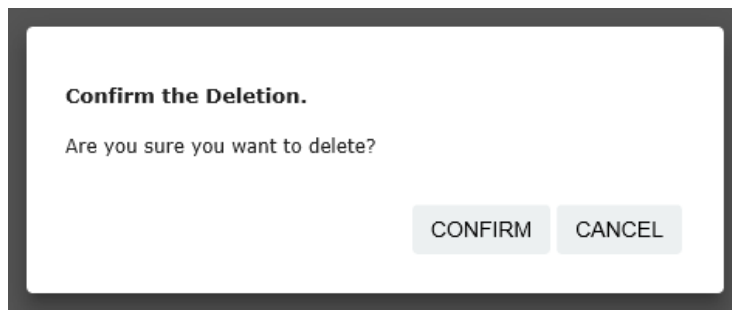


As shown below, the **Setup Collaborating IRB List** page opens.



Click to select the checkboxes of the item(s) to be deleted in the far left columns and click the **Delete Selected Organization(s)** button (blue boxes in screenshot above).

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The **Organization** is deleted from the list on the **Setup Collaborating IRB List** page.

## Ceded – Review Type List

The iRIS™ system allows for setup and maintenance of a **Type of Review List**: a dropdown list of review types provided in the **Ceded to IRB Review Type** field on the **Outcome** tab of a submission, as demonstrated below.

The screenshot shows a form with several sections. On the left is a navigation menu with items like 'Review Checklist and Comments', 'Review Summary', 'Submission Discussion', 'Recommendation', 'Stipulation', 'Internal Submission Routing', 'Outcome', and 'Outcome Letter'. The main form area contains:
 

- IRB of Record:** Radio buttons for 'Yes' and 'No' (No is selected).
- IRB Initial Approval:** A dropdown menu currently set to '--none--'.
- Review Cycle:** A dropdown menu.
- IRB Expiration:** A date field with a 'Calculate Date' button.
- Continuing Review Due:** A date field.
- Protocol Closure:** A date field.
- Temporary Closed:** Radio buttons.
- Ceded to IRB:** A dropdown menu set to 'IRB One'.
- Ceded to Expiration Date:** A date field set to '10/04/2016'.
- Ceded to IRB Number:** A text input field.
- Ceded to IRB Review Type:** A dropdown menu with options: 'none', 'Escalated', and 'Expedited'.

This field populates when the user indicates that the current IRB is not the IRB of Record and the study has been ceded to another IRB.

The **Type of Review List** is maintained on the **Setup Type of Review List** page, which is accessed via the **Ceded – Review Type List** link on the **List Maintenance Setup** tab, as shown in the example below.

The screenshot shows the 'List Maintenance Setup' tab selected in a navigation bar. Below the navigation bar, there is a section titled 'Review Board Lists' with a red header. A list of items follows:
 

- Adult Risk Assigned Configuration List
- Adult Benefit Assigned Configuration List
- Ceded - Collaborating IRB List
- Ceded - Review Type List (highlighted with a blue arrow)
- Pediatric Risk Assigned Configuration List
- Regulatory Determination 1 List

Clicking the link opens the **Setup Type of Review List** page, shown below.

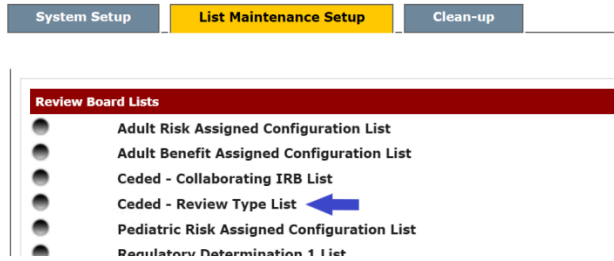
The screenshot shows the 'Setup Type of Review List' page. At the top, there are tabs for 'My Workspaces', 'IRB', and 'Setup Type of Review List'. Below the tabs are buttons for 'Add an Type of Review' and 'Delete Selected Type of Review(s)'. The main content is a table with the following data:
 

	Edit	Type of Review
<input type="checkbox"/>		Entertained
<input type="checkbox"/>		Escalated
<input type="checkbox"/>		Expedited
<input type="checkbox"/>		Multi-site Reliance Study Fee
<input type="checkbox"/>		Outside IRB Reviewed Study Fee

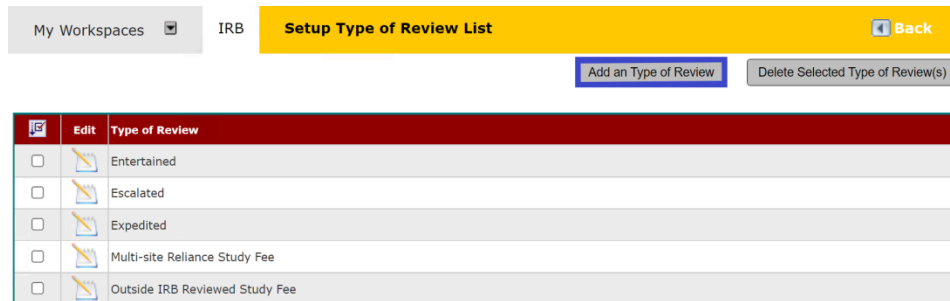
The page lists all previously configured **Type of Review** records and provides controls for creating, revising and deleting **Type of Review** records.

### Add Type of Review

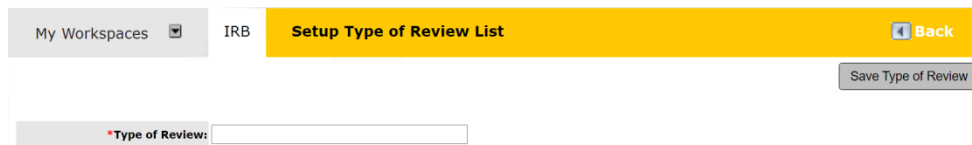
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Ceded – Review Type List** link.



As shown below, the **Setup Type of Review List** page opens.



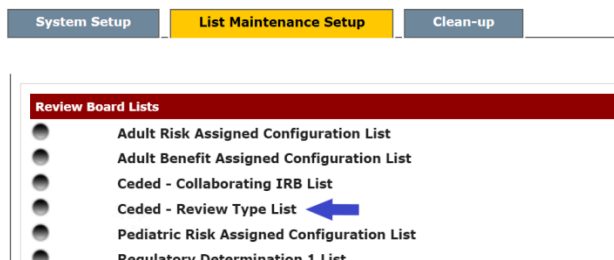
Click the **Add an Type of Review** button (blue box in screenshot above). An add form opens, as shown below.



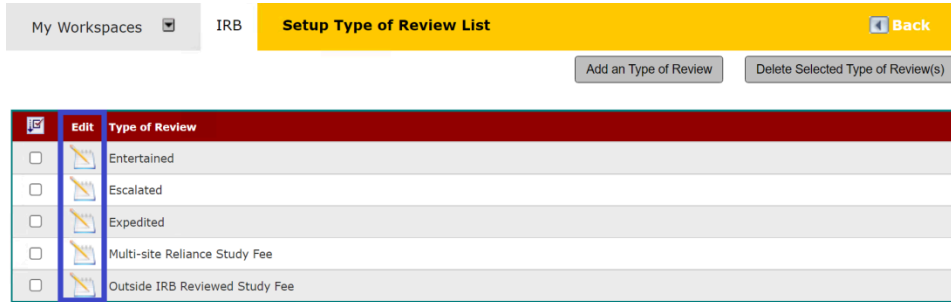
Enter the desired text for the new **Type of Review** and click the **Save Type of Review** button. The add form closes and the new **Type of Review** is added to the list on the **Setup Type of Review List** page.

## Edit Type of Review

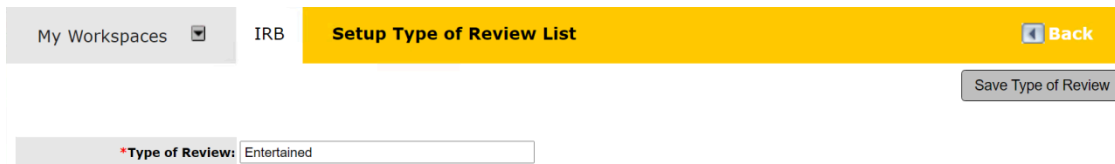
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Ceded – Review Type List** link.



As shown below, the **Setup Type of Review List** page opens.



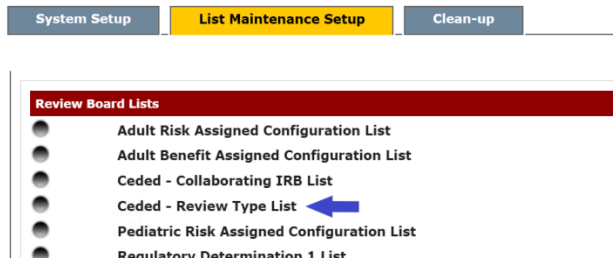
Click the applicable icon in the **Edit** column (blue box in screenshot above). The applicable record is opened in an edit form, as shown below.



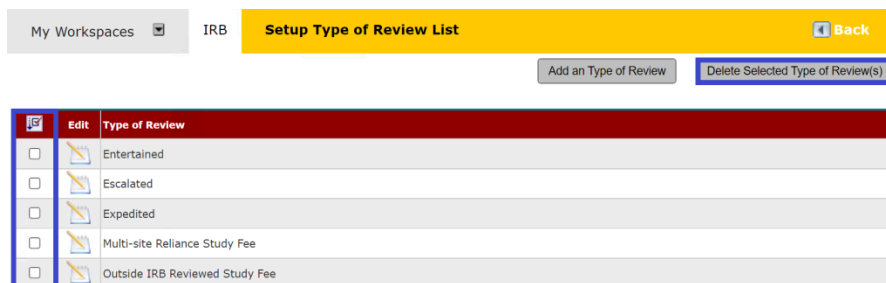
Make desired changes to **Type of Review** text and click the **Save Type of Review** button. The edit form closes and the **Type of Review** is revised in the list on the **Setup Type of Review List** page.

### Delete Review Type

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Ceded – Review Type List** link.

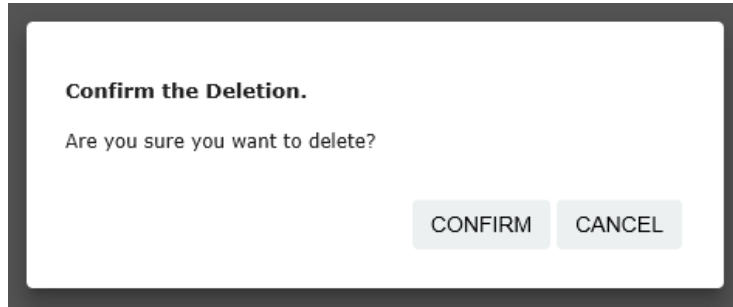


As shown below, the **Setup Type of Review List** page opens.



Click to select the checkboxes of the item(s) to be deleted in the far left columns and click the **Delete Selected Type of Review(s)** button (blue boxes in screenshot above).

A confirmation popup window displays.



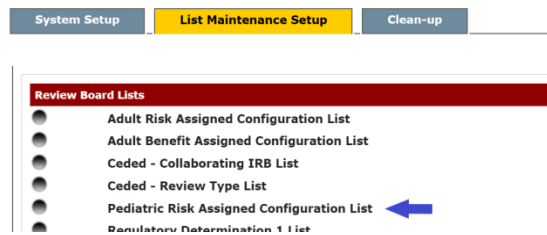
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The **Type of Review** is deleted from the list on the **Setup Type of Review List** page.

## Pediatric Risk Assigned Configuration List

Where the property rb.use\_child\_risk\_assigned is set to “Yes” (under IRB Assistant > Review Board Administration > Board Configuration Options > Study Board Properties), the iRIS™ system allows for setup and maintenance of a **Pediatric Risk Assigned Configuration List**. The list contains current risk ratings the review board can assign to rate potential risk to minors accrued from participation in a particular study.

Setting the property to “Yes” populates a **Pediatric Risk Assigned Configuration List** link on the List Maintenance Setup tab, as shown in the example below.



Click the link to open the **Setup Pediatric Risk Assigned List** page, shown below.

My Workspaces ▾ IRB **Setup Pediatric Risk Assigned List** [Back](#)

[Add a Pediatric Risk](#) [Delete Selected Pediatric Risk\(s\)](#)

<input type="checkbox"/>	Edit	Order Number	Pediatric Risk	Pediatric Risk Description
<input type="checkbox"/>		1	minimal	Research not involving greater than minimal risk.
<input type="checkbox"/>		2	> minimal w/ prospect of direct benefit	Research involving greater than minimal risk but presenting the prospect of direct benefit to the individual subjects.
<input type="checkbox"/>		3	> minimal w/ NO direct benefit	Research involving greater than minimal risk and no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge about the subject's disorder or condition.
<input type="checkbox"/>		4	not otherwise approvable	Research not otherwise approvable which presents an opportunity to understand, prevent, or alleviate a serious problem affecting the health or welfare of children.

The page lists all previously configured adult risk assignments and provides controls for creating, revising and deleting adult risk assignment records.

The list defined here is used to populate the dropdown picklist for the **Pediatric Risk Assigned** field, which appears in both the **Outcome** tab (shown below) and Study Summary screen (not shown).

### Add Pediatric Risk Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Pediatric Risk Assigned Configuration List** link.

System Setup **List Maintenance Setup** Clean-up

**Review Board Lists**

- Adult Risk Assigned Configuration List
- Adult Benefit Assigned Configuration List
- Ceded - Collaborating IRB List
- Ceded - Review Type List
- **Pediatric Risk Assigned Configuration List** ←
- Regulatory Determination 1 List

As shown below, the **Setup Pediatric Risk Assigned List** page opens.

My Workspaces ▾ IRB **Setup Pediatric Risk Assigned List** [Back](#)

[Add a Pediatric Risk](#) [Delete Selected Pediatric Risk\(s\)](#)

<input type="checkbox"/>	Edit	Order Number	Pediatric Risk	Pediatric Risk Description
<input type="checkbox"/>		1	minimal	Research not involving greater than minimal risk.
<input type="checkbox"/>		2	> minimal w/ prospect of direct benefit	Research involving greater than minimal risk but presenting the prospect of direct benefit to the individual subjects.
<input type="checkbox"/>		3	> minimal w/ NO direct benefit	Research involving greater than minimal risk and no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge about the subject's disorder or condition.
<input type="checkbox"/>		4	not otherwise approvable	Research not otherwise approvable which presents an opportunity to understand, prevent, or alleviate a serious problem affecting the health or welfare of children.

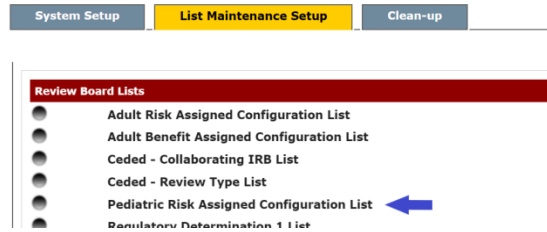
Click the **Add a Pediatric Risk** button (blue box in screenshot above). An add form opens, as shown below.

**Order Number** defaults to “1” (one), meaning that this entry will appear at the top of the list on the **Setup Pediatric Risk Assigned List** page when saved. The field is unlocked, allowing for entry of a different **Order Number**. If a duplicate **Order Number** is entered here the list is automatically reordered, with the new item taking precedence.

Enter desired text for **Pediatric Risk** and **Pediatric Risk Description**, and click the **Save Pediatric Risk** button. The add form closes and the new **Adult Risk** is added to the list on the **Setup Adult Risk Assigned List** page.

### Edit Pediatric Risk Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Pediatric Risk Assigned Configuration List** link.



As shown below, the **Setup Pediatric Risk Assigned List** page opens.

<input type="checkbox"/>	Edit	Order Number	Pediatric Risk	Pediatric Risk Description
<input type="checkbox"/>		1	minimal	Research not involving greater than minimal risk.
<input type="checkbox"/>		2	> minimal w/ prospect of direct benefit	Research involving greater than minimal risk but presenting the prospect of direct benefit to the individual subjects.
<input type="checkbox"/>		3	> minimal w/ NO direct benefit	Research involving greater than minimal risk and no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge about the subject's disorder or condition.
<input type="checkbox"/>		4	not otherwise approvable	Research not otherwise approvable which presents an opportunity to understand, prevent, or alleviate a serious problem affecting the health or welfare of children.

Click the applicable icon in the **Edit** column (blue box in screenshot above). The selected record opens in an edit form, as shown below.

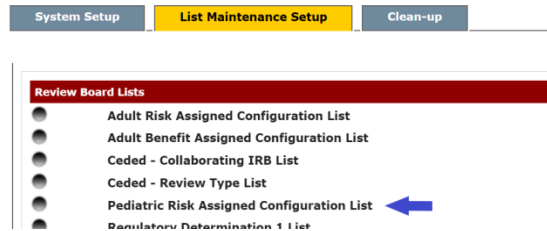
Make desired changes to **Order Number**, **Pediatric Risk** and **Pediatric Risk Description**.

If a duplicate **Order Number** is entered here the list is automatically reordered when changes are saved, with the new item taking precedence.

Click the **Save Pediatric Risk** button. The edit form closes and the **Pediatric Risk** is revised in the list on the **Setup Pediatric Risk Assigned List** page.

### Delete Pediatric Risk Assigned

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Pediatric Risk Assigned Configuration List** link.

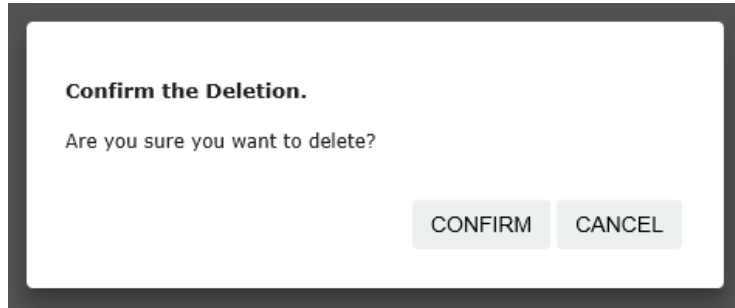


As shown below, the **Setup Pediatric Risk Assigned List** page opens.

IS	Edit	Order Number	Pediatric Risk	Pediatric Risk Description
<input type="checkbox"/>		1	minimal	Research not involving greater than minimal risk.
<input type="checkbox"/>		2	> minimal w/ prospect of direct benefit	Research involving greater than minimal risk but presenting the prospect of direct benefit to the individual subjects.
<input type="checkbox"/>		3	> minimal w/ NO direct benefit	Research involving greater than minimal risk and no prospect of direct benefit to individual subjects, but likely to yield generalizable knowledge about the subject's disorder or condition.
<input type="checkbox"/>		4	not otherwise approvable	Research not otherwise approvable which presents an opportunity to understand, prevent, or alleviate a serious problem affecting the health or welfare of children.

Click to select the checkboxes of the item(s) to be deleted in the far left column and click the **Delete Selected Pediatric Risk(s)** button (blue boxes in screenshot above).

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

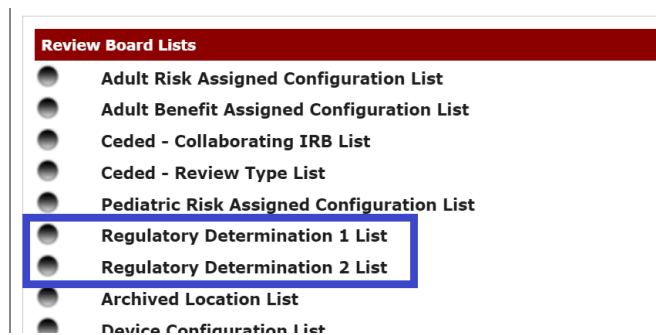
Click **CONFIRM** to complete deletion of the record. The item is deleted from the list on the **Setup Pediatric Risk Assigned List** page.

## Regulatory Determination 1 List / Regulatory Determination 2 List

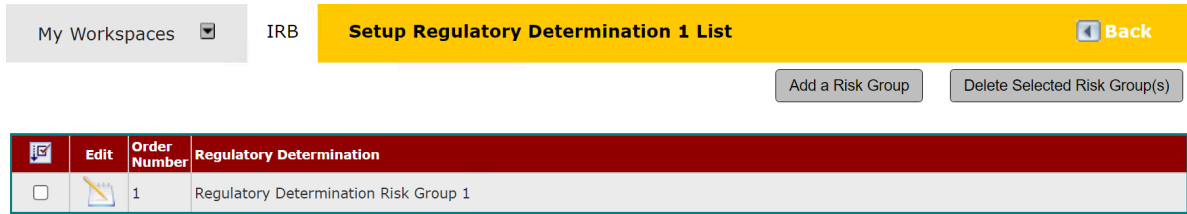
The **Regulatory Determination 1 List** and **Regulatory Determination 2 List** are used in the Outcome tab, to provide the IRB with preconfigured dropdown picklists of up to two regulatory determinations applicable to a given submission.



The configuration lists are accessed via the IRB Assistant > Review Board Administration > List Maintenance Setup tab > **Regulatory Determination 1 List** and **Regulatory Determination 2 List** links.



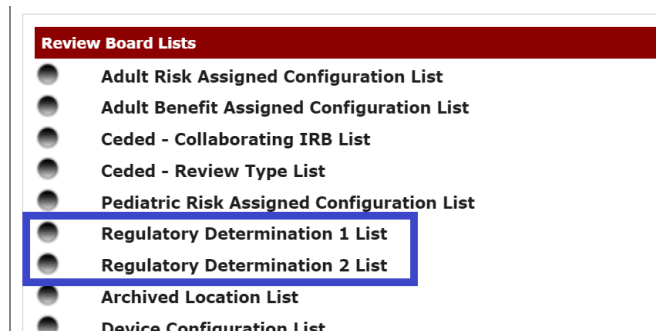
Clicking either link opens the associated **Regulatory Determination List** page (example, **Regulatory Determination 1 List** page, shown below).



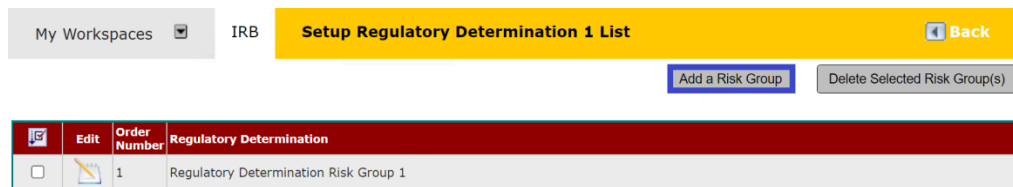
Processes for adding, revising and deleting regulatory determination items are the same for both lists, as described in the following manual subsections.

## Add Regulatory Determination

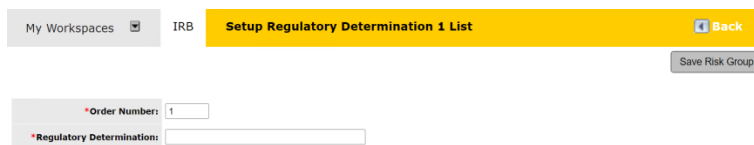
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the applicable **Regulatory Determination List** link.



As shown below, the applicable **Setup Regulatory Determination Assigned List** page opens.



Click the **Add a Risk Group** button (blue box in screenshot above). An add form opens, as shown below.

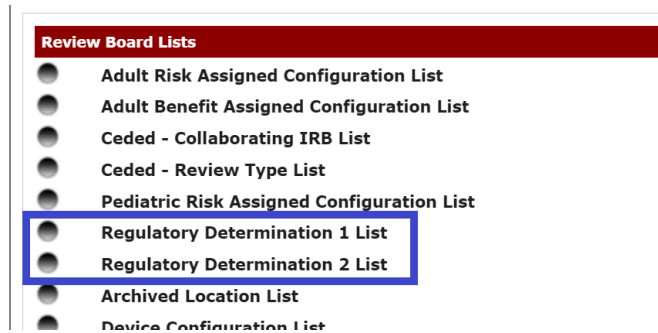


**Order Number** defaults to “1” (one), meaning that this entry will appear at the top of the list on the **Setup Regulatory Determination List** page when saved. The field is unlocked, allowing for entry of a different **Order Number**. If a duplicate **Order Number** is entered here the list is automatically reordered, with the new item taking precedence.

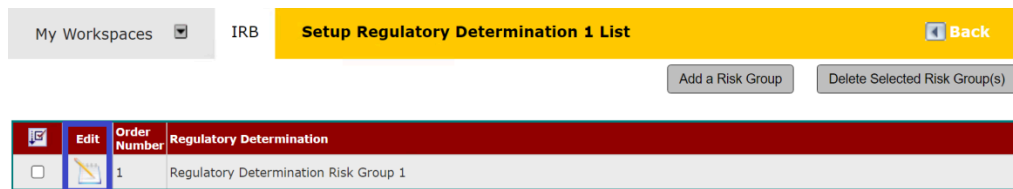
Enter desired text for **Regulatory Determination** and click the **Save Risk Group** button. The add form closes and the new **Regulatory Determination** is added to the list on the applicable **Setup Regulatory Determination List** page.

## Edit Regulatory Determination

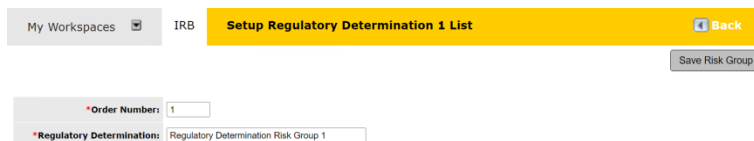
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the applicable **Regulatory Determination List** link.



As shown below, the applicable **Setup Regulatory Determination List** page opens.



Click the **Add a Risk Group** button (blue box in screenshot above). An add form opens, as shown below.



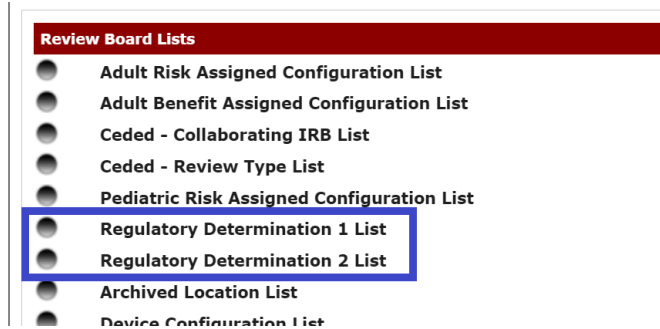
Make desired changes to **Order Number** and **Regulatory Determination** and click the **Save Risk Group** button.

If a duplicate **Order Number** is entered here the list is automatically reordered when changes are saved, with the new item taking precedence.

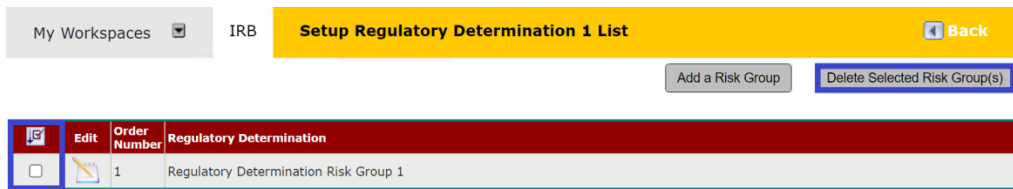
The edit form closes and the **Regulatory Determination** is revised in the list on the applicable **Setup Regulatory Determination List** page.

## Delete Regulatory Determination

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the applicable **Regulatory Determination List** link.

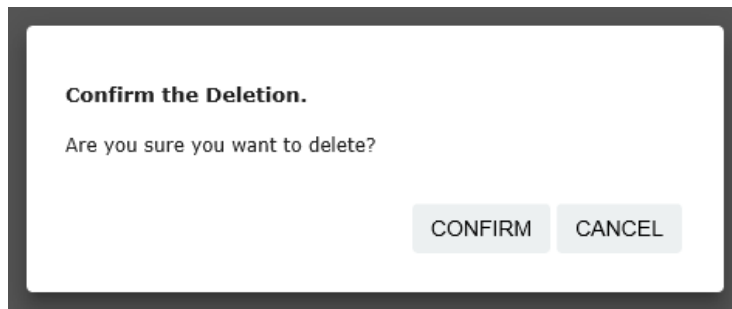


As shown below, the applicable **Setup Regulatory Determination List** page opens.



Click to select the checkboxes of the item(s) to be deleted in the far left column and click the **Delete Selected Risk Group(s)** button (blue boxes in screenshot above).

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The item is deleted from the list on the applicable **Setup Regulatory Determination List** page.

## Archived Location List

Where the property `rb.use_archived_location` is set to "Yes" (under IRB Assistant > Review Board Administration > Board Configuration Options > Study Board Properties, see screenshot below), the iRIS™ system provides a means for tracking locations where study documentation can be archived.

Property Name	Property Value
rb.use_adult_benefit_assigned	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_adult_risk_assigned	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_archived_location	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_audit_view	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_biosafety_level	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_ceded_review_details	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_child_risk_assigned	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_common_rule_display	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_continue_review	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_continue_review_due	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_controls_approved	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_dod_outcome_labels	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_experimental_level	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_expiration_date	<input checked="" type="radio"/> Yes <input type="radio"/> No

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Archived Location List** link.



The **Setup Archived Location List** page is opened.

My Workspaces ▾ IRB **Setup Archived Location List** Back

Add a New Location

List of Archived Locations

0 result(s) found...

✓	Edit	Archived Location
No Archived Locations are found.		

### Archived Location List Implementation – Application Side

The archived location list is provided as a dropdown picklist on the **Study Summary** page for selection of **Archived Location** when a study/submission is renewed or reactivated, as shown in the IACUC example below.

My Workspaces ▾ IACUC Number: ANI-12-156 IACUC **Study Summary** Back

Alias: Application  
PI: admin, Admin Admin, Ph.D. Brig. Gen.

Study Status: IACUC Number: ANI-12-156 Study Title: Application 2204

IACUC Expiration Date: 10/08/2015

IACUC Full Renewal Expiration Date: 04/08/2016

Save Changes

Previous Protocol Number:

Archived Location: --none--  
--none--  
Location 1

### Archived Location List Implementation – Board Side

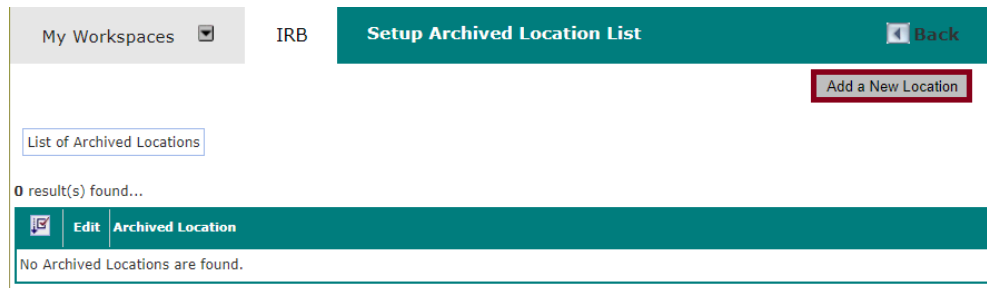
Where applicable, archive locations are specified on the application side and are not generally subject to direct revision by the board.

## Add Archived Location

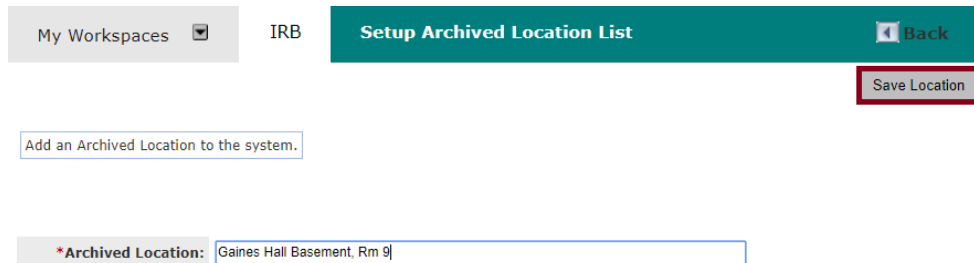
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Archived Location List** link.



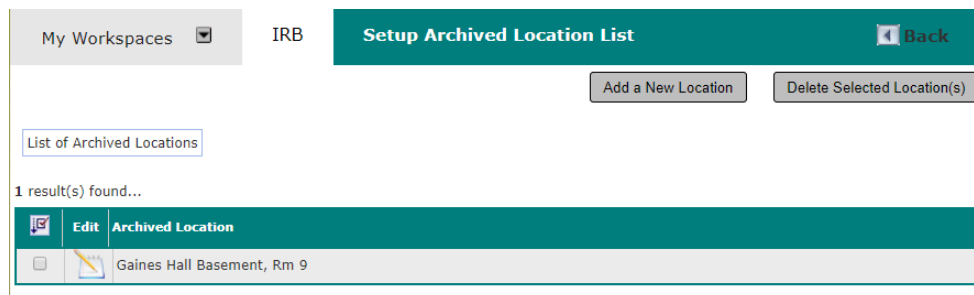
The **Setup Archived Location List** page is opened. Click the **Add a New Location** button.



Enter the desired **Archived Location** and click the **Save Location** button.



The category is added on the main **Setup Archived Location List** page.

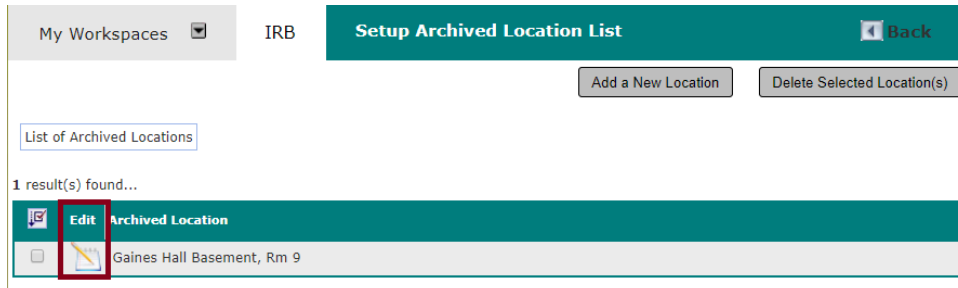


## Edit Archived Location

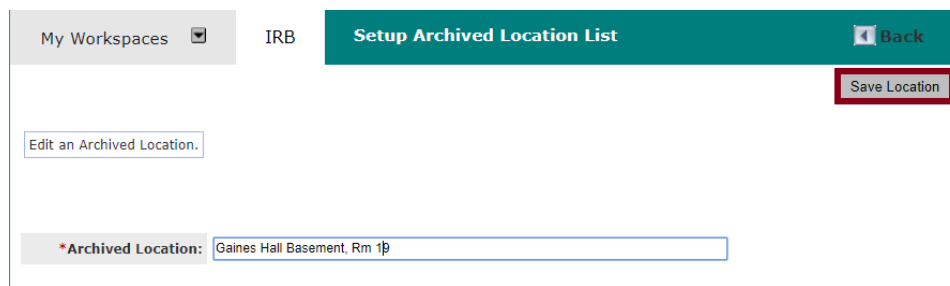
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Archived Location List** link.



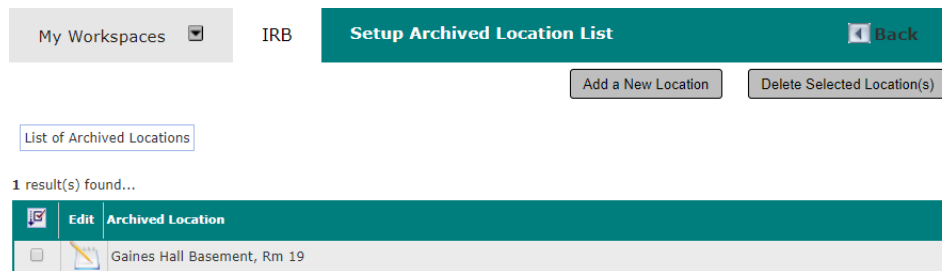
The **Setup Archived Location List** page is opened. Click the icon in the **Edit** column for the applicable item.



The record is opened for editing. Make desired changes to the **Archived Location** field and click the **Save Location** button.

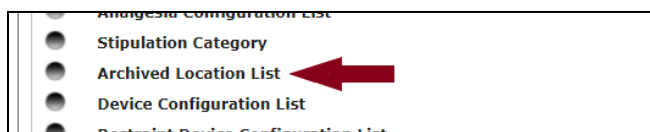


The category is revised on the main **Setup Archived Location List** page.

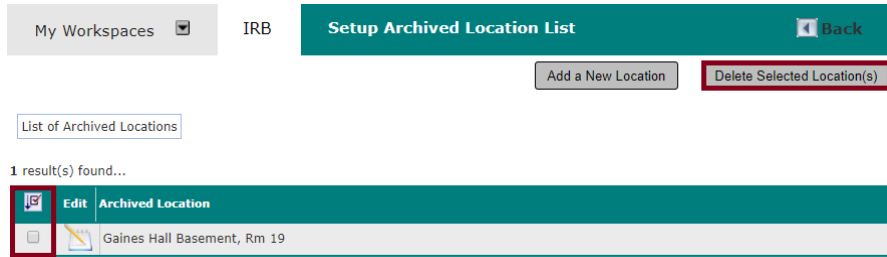


## Delete Archived Location

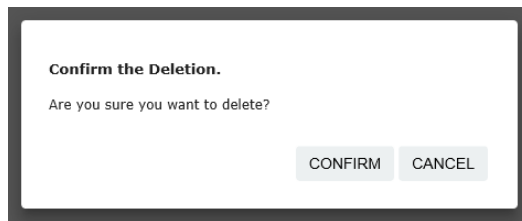
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Archived Location List** link.



The **Setup Archived Location List** page is opened. Select the checkbox(es) for the item(s) to be deleted and click the **Delete Selected Location(s)** button.

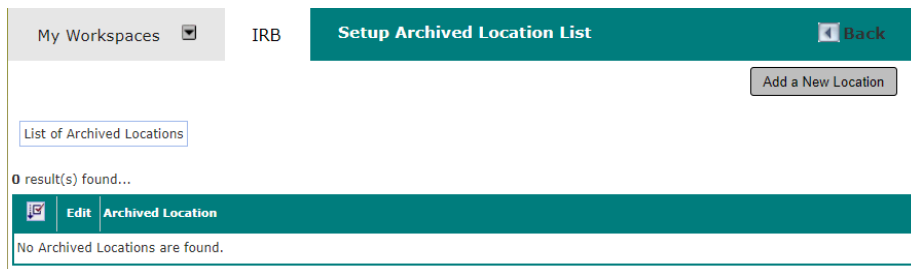


A confirmation popup window appears.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted from the list on the main **Setup Archived Location List** page.

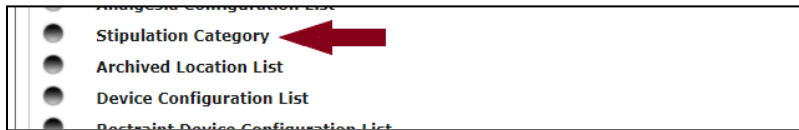


## Stipulation Category

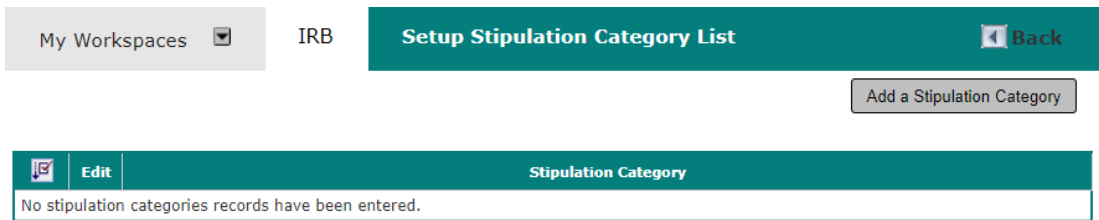
Where the property `rb.use_stipulation_category` is set to "Yes" (under IRB Assistant > Review Board Administration > Board Configuration Options > Recommendations and Stipulations), the review board can group stipulation items into categories.

Property Name	Property Value
rb.update_recommendation_by_all	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.update_stipulation_by_all	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_bundle_stipulation	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_stipulation_category	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_stipulation_control_response	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_stipulation_responses_display_all_boards	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_stipulation_tracking	<input checked="" type="radio"/> Yes <input type="radio"/> No

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Stipulation Category** link.



The **Setup Stipulation Category List** page is opened.

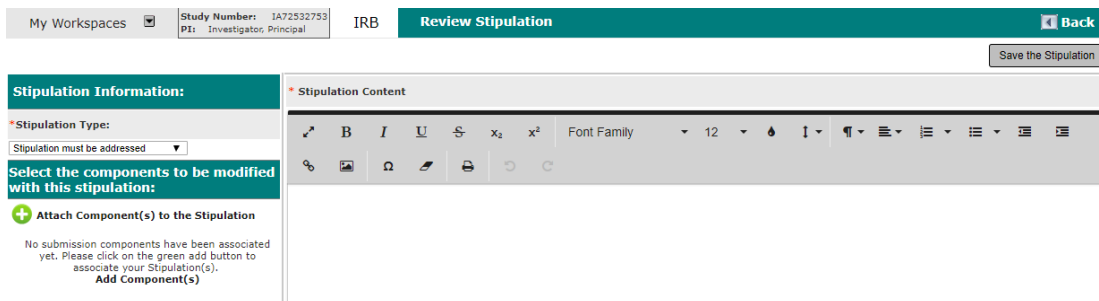


## Stipulation Category List Implementation – Application Side

Where applicable, stipulations are assigned on the board review side. This list is not employed on the application side.

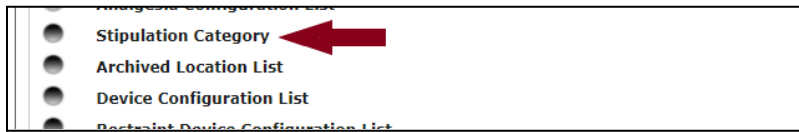
## Stipulation Category List Implementation – Board Side

The stipulation category list is provided as a dropdown picklist for selection of **Stipulation Type** when a stipulation is added for a submission.

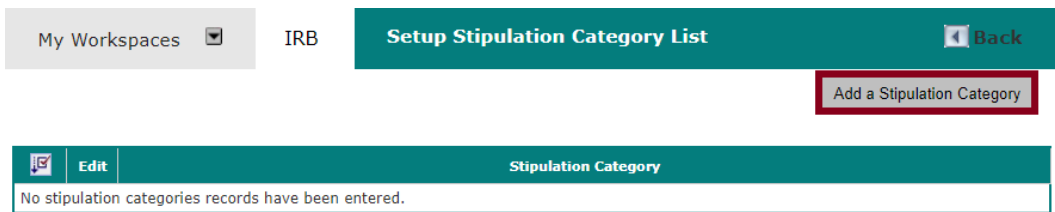


## Add Stipulation Category

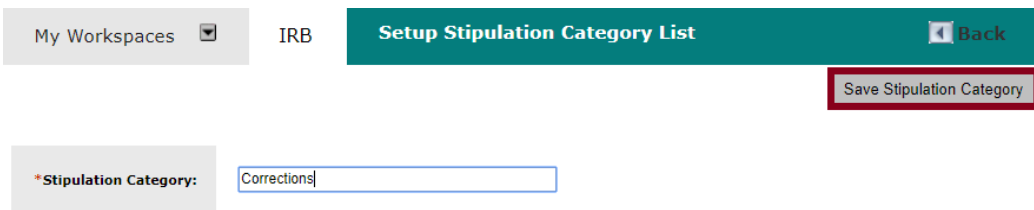
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Stipulation Category** link.



The **Setup Stipulation Category List** page is opened. Click the **Add a Stipulation Category** button.



Enter a **Stipulation Category** name and click the **Save Stipulation Category** button.



The category is added on the main **Setup Stipulation Category List** page.



## Edit Stipulation Category

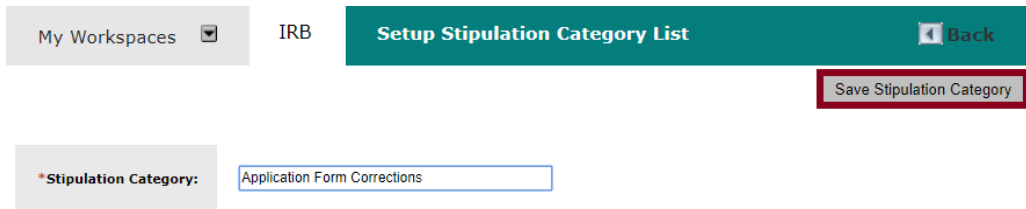
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Stipulation Category** link.



The **Setup Stipulation Category List** page is opened. Click the icon in the **Edit** column for the applicable item.



The record is opened for editing. Make desired changes to the **Stipulation Category** name and click the **Save Stipulation Category** button.

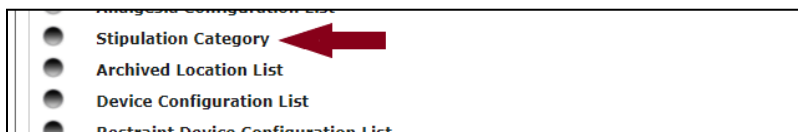


The category is revised on the main **Setup Stipulation Category List** page.



## Delete Stipulation Category

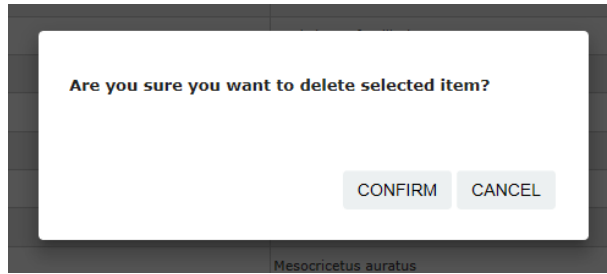
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Stipulation Category** link.



The **Setup Stipulation Category List** page is opened. Select the checkbox(es) for the item(s) to be deleted and click the **Delete Select Stipulation Category(s)** button.

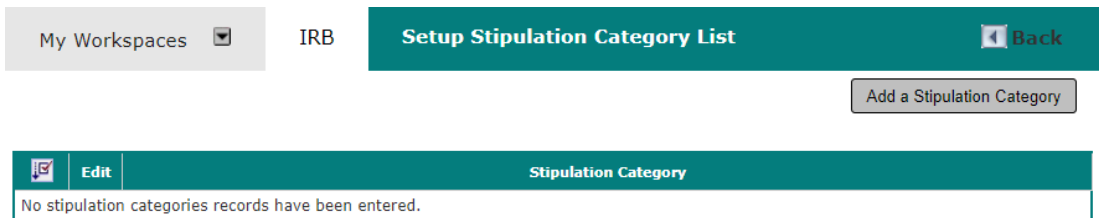


A confirmation popup window displays.



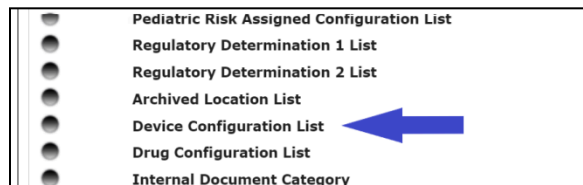
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The item is deleted from the **Setup Stipulation Category List** page.

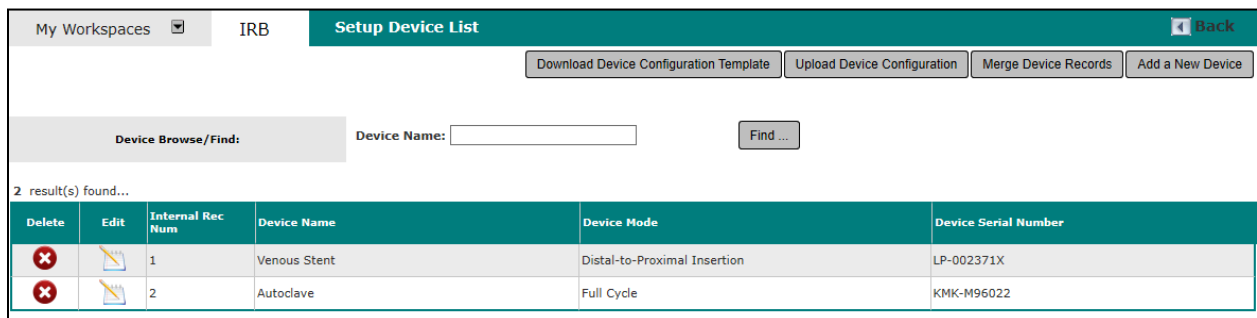


## Device Configuration List

The **Device Configuration List** is where a list of devices approved by the institution for use in animal subject studies is maintained in the iRIS™ system. To access the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



The **Setup Device List** page is opened.



If the device list is lengthy, use the **Device Browse/Find** form above the list to search for records by **Device Name**.

## Device List Implementation – Application Side

The device list is employed in the following areas on the application side of iRIS™.

**Study Application** — the Device Configuration List is made available in an application via an **Add a New Device to the Study** button



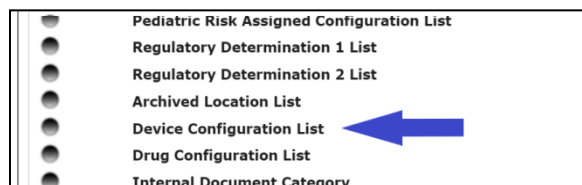
For more information about the study application, see the Study Assistant Manual.

## Device List Implementation – Board Side

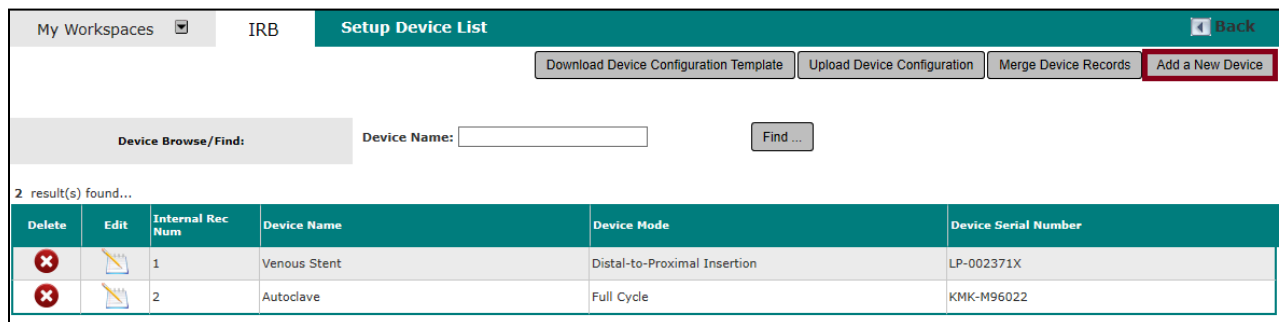
Devices are added on the application side where required and are not generally subject to direct revision by the board.

### Add a New Device

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



The **Setup Device List** page is opened. Click the **Add a New Device** button.



An **Add a new device to the system** panel opens for entry of the new record.

My Workspaces ▾ IRB **Setup Device List** [Back](#)

[Save Changes](#)

Add a new device to the system.

\*Device Name:

Device Mode:

Device Serial Number:

Enter a **Device Name**, **Device Mode** and **Device Serial Number**, then click the **Save Changes** button.

My Workspaces ▾ IRB **Setup Device List** [Back](#)

[Save Changes](#)

Add a new device to the system.

\*Device Name:

Device Mode:

Device Serial Number:

The add panel is closed and the new record is added on the **Setup Device List** page.

My Workspaces ▾ IRB **Setup Device List** [Back](#)

[Download Device Configuration Template](#) [Upload Device Configuration](#) [Merge Device Records](#) [Add a New Device](#)

Device Browse/Find: Device Name:  [Find ...](#)

3 result(s) found...

Delete	Edit	Internal Rec Num	Device Name	Device Mode	Device Serial Number
		1	Venous Stent	Distal-to-Proximal Insertion	LP-002371X
		3	High Temp Cautery Pen	Fine Tip	9560087ML
		2	Autoclave	Full Cycle	KMK-M96022

### Download Device Configuration Template

The iRIS™ system provides a mechanism for adding a large quantity of device records at once, via population and upload of a pre-formatted Excel template. Click the **Download Device Configuration Template** button to begin. A download dialog opens at the bottom of the page.

## IRB Assistant — List Maintenance iRIS™ v13.01

My Workspaces IRB **Setup Device List** Back

Download Device Configuration Template Upload Device Configuration Merge Device Records Add a New Device

Device Browse/Find: Device Name: Find ...

3 result(s) found...

Delete	Edit	Internal Rec Num	Device Name	Device Mode	Device Serial Number
		1	Venous Stent	Distal-to-Proximal Insertion	LP-002371X
		3	High Temp Cautery Pen	Fine Tip	9560087ML
		2	Autoclave	Full Cycle	KMK-M96022

What do you want to do with HCPPJOYZ.xls?  
From: sb1.imedris.net

Open Save ^ Cancel X

Click the **Cancel** button in the download dialog popup to close it without downloading the template.

Click the **Save** button in the download dialog popup to save the template to the default Downloads folder on the computer. Click the upward-pointing arrow to the right of the **Save** button to access Save As options, which allow for saving the template to the user's desired location on the computer.

The download dialog popup message changes when the download is complete, as shown below.

HCPPJOYZ.xls finished downloading.

Open Open folder View downloads X

Navigate to the downloaded template file and open it.

AutoSave Off HCPPJOYZ - Compatibility...

File Home Insert Page Layout Formulas Data Review View Help

Calibri 11

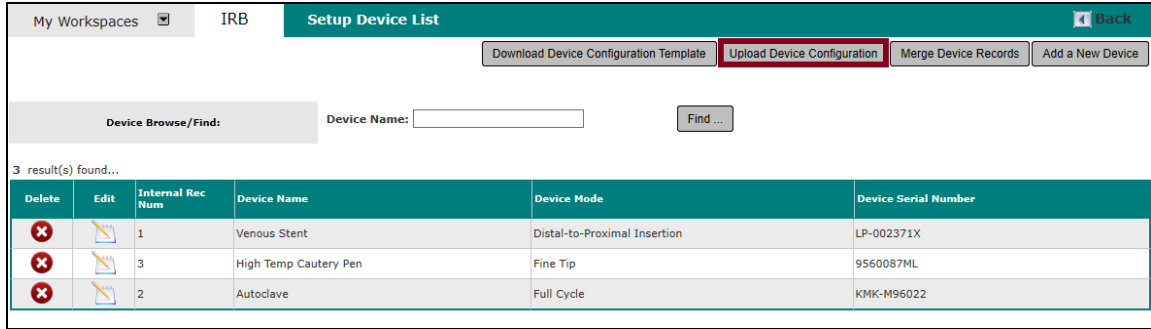
Clipboard Font Alignment Styles

	A	B	C
1	<b>Device Name</b>	<b>Device Mode</b>	<b>Device Serial No</b>
2	No more than 128 characters	No more than 32 characters	No more than 32 characters
3			
4			

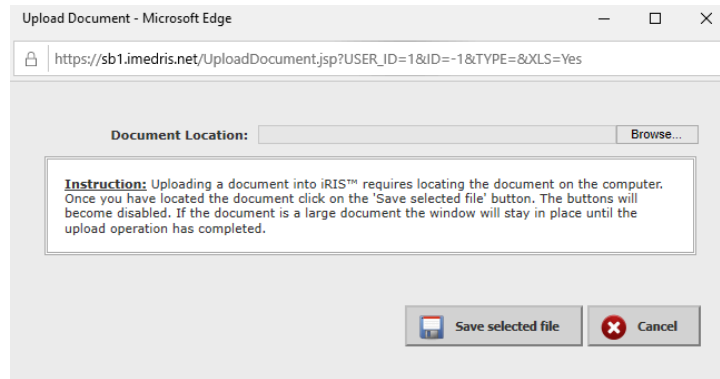
As shown in the screenshot above, field length limits are provided in the second row. Enter desired device records to complete the template and save changes to the file.

### Upload Device Configuration Template

When the Device Template has been populated with all desired data, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link. The **Setup Device List** page opens. Click the **Upload Device Configuration** button.



An upload dialog popup appears.



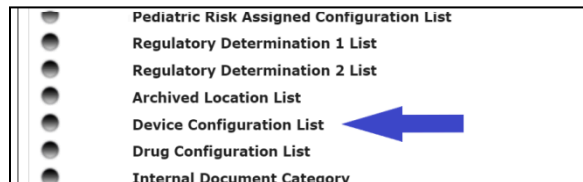
Click the **Cancel** button to close the dialog without completing the upload.

Click the **Browse...** button to navigate to the completed template and select it, then click the **Save selected file** button to complete the upload.

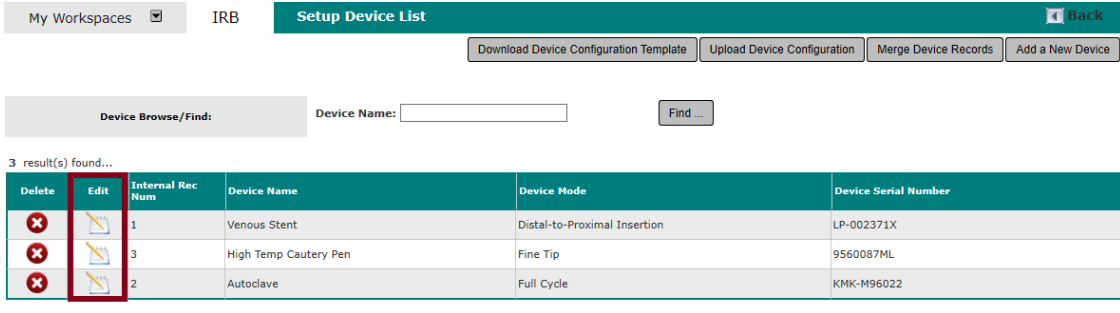
Review the uploaded records in the **Setup Device List** page to ensure the uploaded records have correctly populated all columns. Any records that do not meet data content requirements must be edited or deleted promptly, to ensure they cannot be mistakenly assigned to studies.

### Edit Device

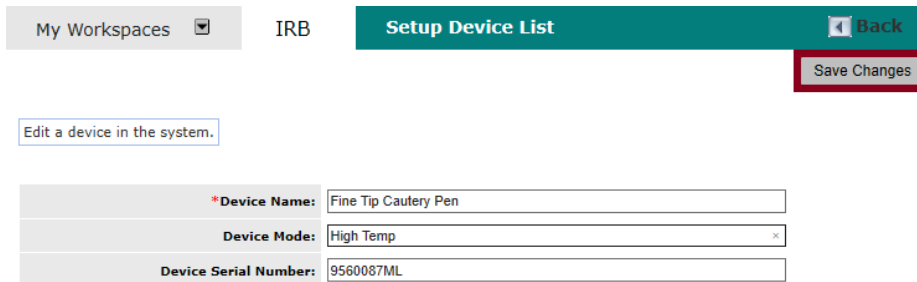
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



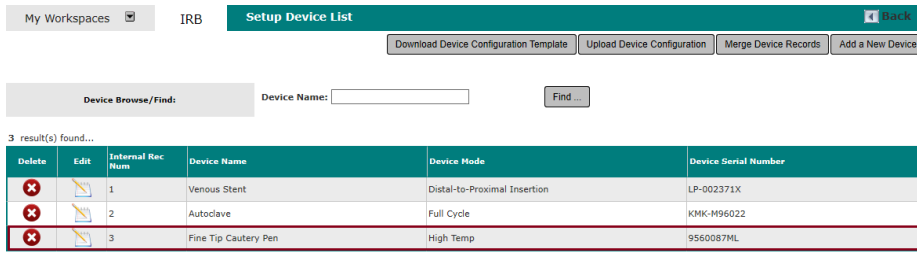
The **Setup Device List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an **Edit a device in the system** panel. Make desired changes and click the **Save Changes** button.

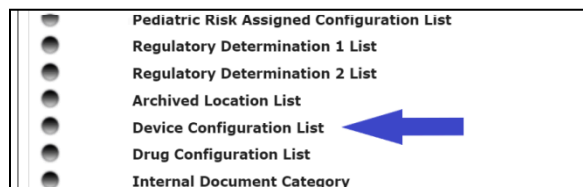


The edit panel is closed and the record is revised on the **Setup Device List** page.

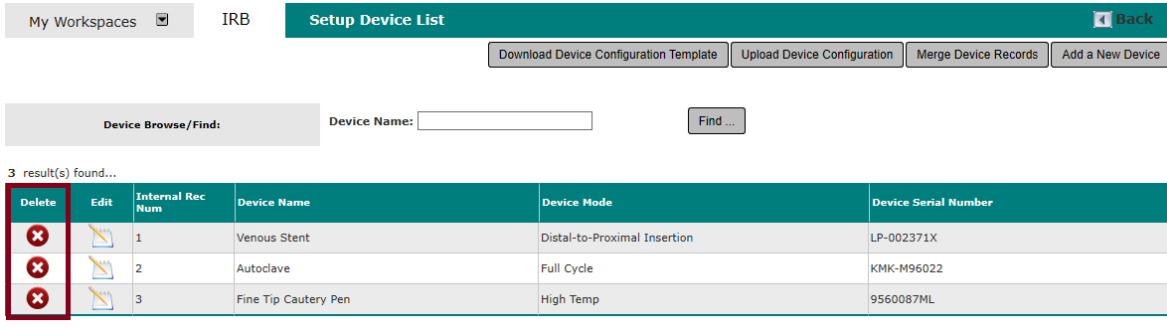


## Delete Device

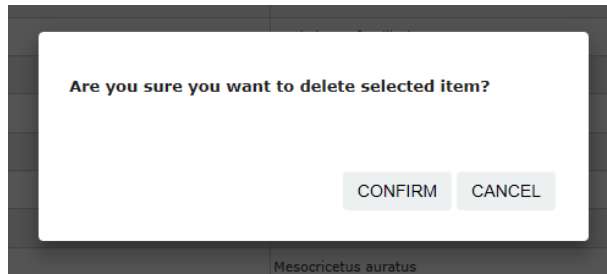
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



The **Setup Device List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

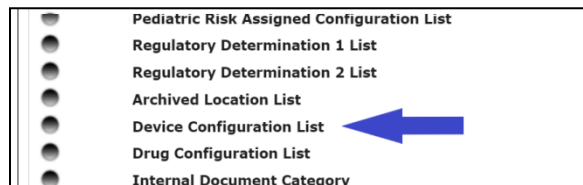
Click **CONFIRM** to complete deletion of the record and return to the **Setup Device List** page.

### Merge Device Records

Sometimes a duplicate or erroneous device record is created and then assigned to one or more study applications before the mistake is caught.

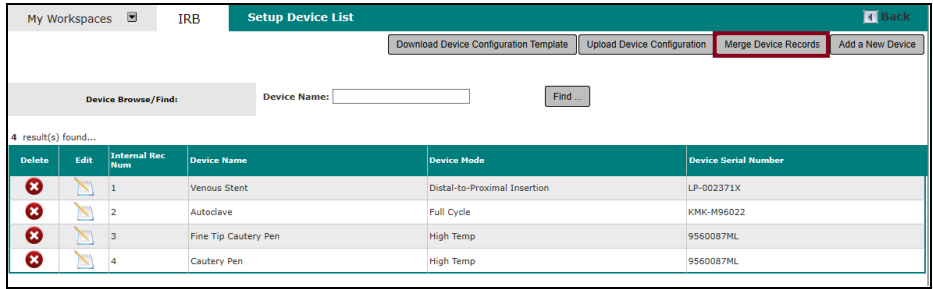
In that situation, the duplicate or erroneous device record can be merged with a valid device record. The valid device record is then substituted for the duplicate/erroneous device record previously assigned to study applications.

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.

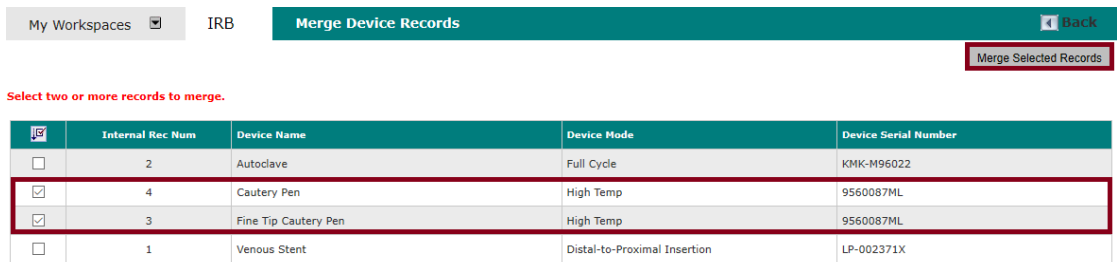


The **Setup Device List** page is opened.

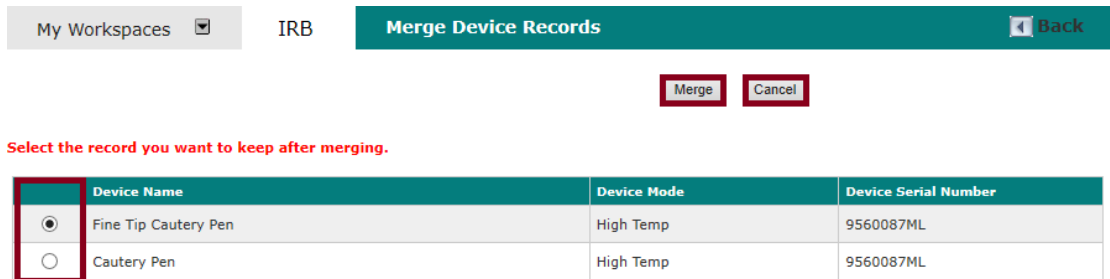
# IRB Assistant — List Maintenance iRIS™ v13.01



In the example shown above, the second “Cautery Pen” device record in the list was created in error but may have been assigned to one or more studies. Click the **Merge Device Records** button to begin. The **Merge Device Records** page opens.

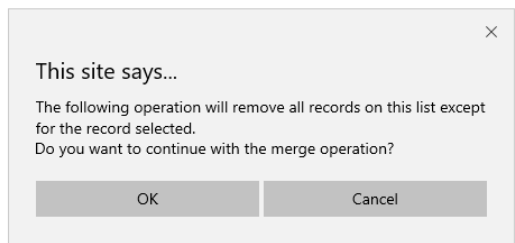


Select the checkboxes at far left for the device records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.



Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Merge Device Records** page, where the merge can be confirmed.

My Workspaces ▾ IRB Merge Device Records ◀ Back

Merge Selected Records

Select two or more records to merge.

<input checked="" type="checkbox"/>	Internal Rec Num	Device Name	Device Mode	Device Serial Number
<input type="checkbox"/>	2	Autoclave	Full Cycle	KMK-M96022
<input type="checkbox"/>	3	Fine Tip Cautery Pen	High Temp	9560087ML
<input type="checkbox"/>	1	Venous Stent	Distal-to-Proximal Insertion	LP-002371X

## Drug Configuration List

The **Drug Configuration List** is where a list of drugs approved by the institution for use in studies is maintained in the iRIS™ system. To access the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.

System Setup | **List Maintenance Setup** | Clean-up

**Review Board Lists**

- Pediatric Risk Assigned Configuration List
- Regulatory Determination 1 List
- Regulatory Determination 2 List
- Archived Location List
- Device Configuration List
- Drug Configuration List** ←
- Internal Document Category

The **Setup Drug List** page is opened.

My Workspaces ▾ IRB Setup Drug List ◀ Back

Download Drug Configuration Template Upload Drug Configuration Merge Drug Records Add a New Drug

Drug Browse/Find: Drug Name:  Find ...

4 result(s) found...

Delete	Edit	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
<input checked="" type="checkbox"/>		4	Amoxicillin	Amoxicillin A1	Amoxicillin A1
<input checked="" type="checkbox"/>		3	Benzocaine	Benzocaine 20% topical gel	Oral Gel
<input checked="" type="checkbox"/>		1	Ibuprofen	Advil	Ibuprofen I
<input checked="" type="checkbox"/>		2	Laxiom	LAX001	Laxiom 00989

If the drug list is lengthy, use the **Drug Browse/Find** section above the list to search for records by **Drug Name**.

## Drug List Implementation – Application Side

Where this field is in use by the institution, it appears in the study application form.

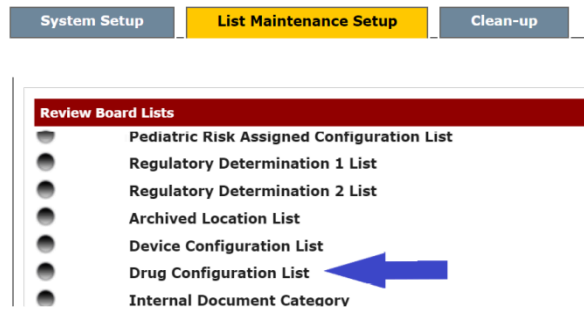
For more information about the study application, see the Study Assistant Manual.

## Drug List Implementation – Board Side

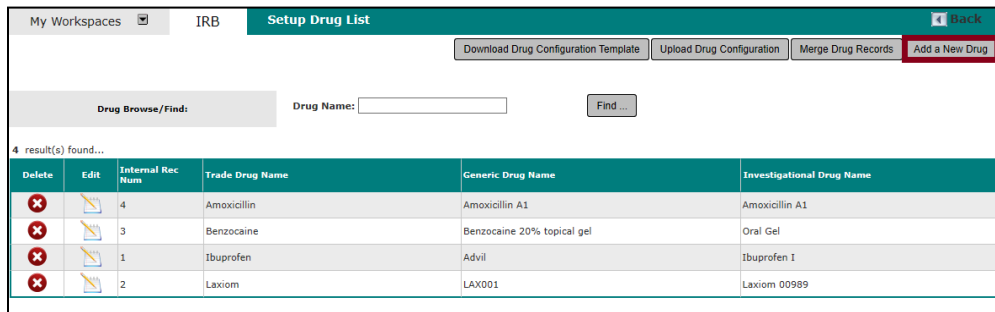
Drugs are added on the application/study side where required and are not generally subject to direct revision by the board.

### Add a New Drug

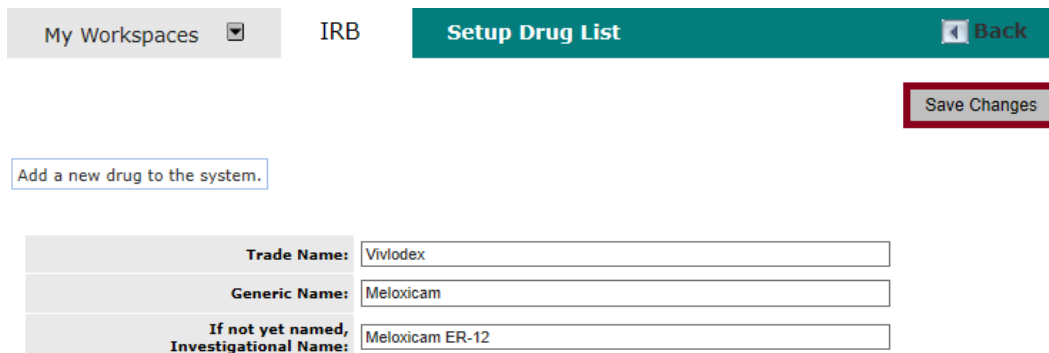
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



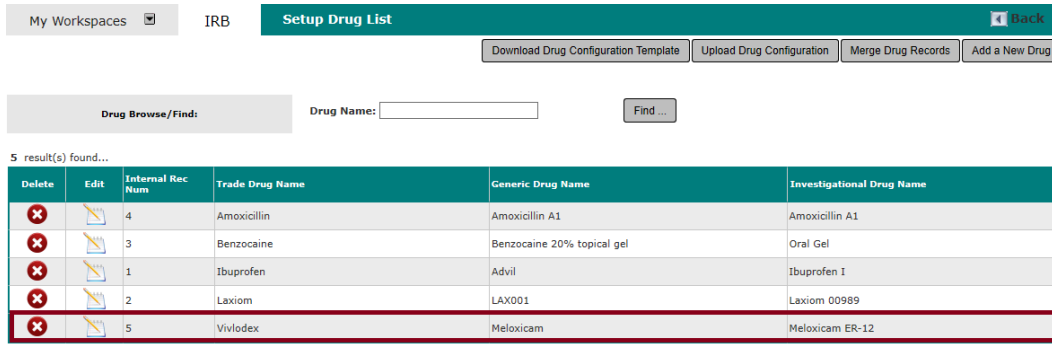
The **Setup Drug List** page is opened. Click the **Add a New Drug** button.



An **Add a new drug to the system** panel opens. Enter **Trade Name**, **Generic Name** and if not yet named, **Investigational Name** details, then click the **Save Changes** button to save the record and close the add panel.

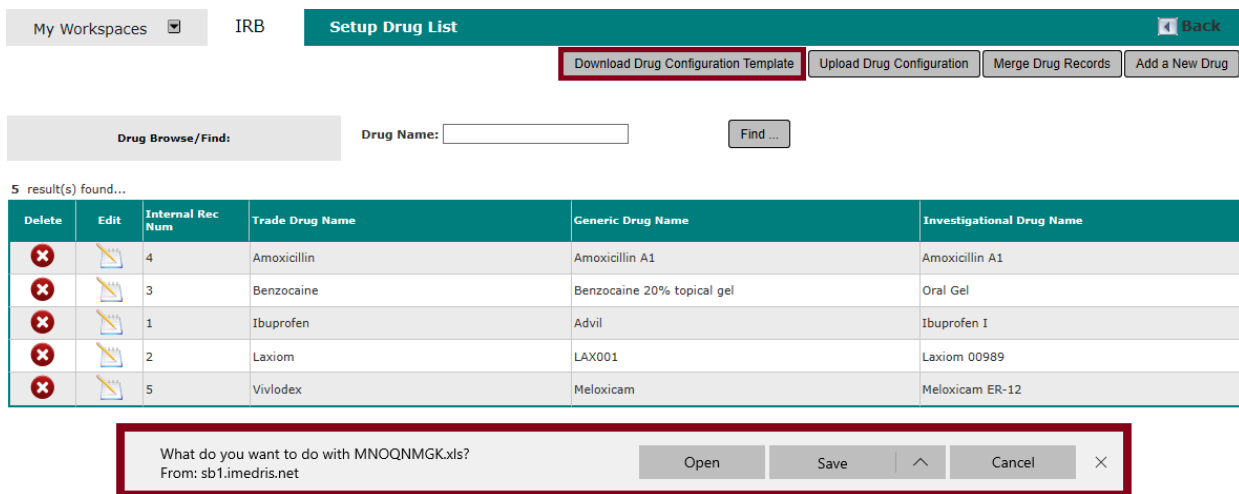


The new drug is added on the **Setup Drug List** page.



### Download Drug Configuration Template

The iRIS™ system provides a mechanism for adding a large quantity of drug records at once, via population and upload of a pre-formatted Excel template. Click the **Download Drug Configuration Template** button to begin. A download dialog opens at the bottom of the page.



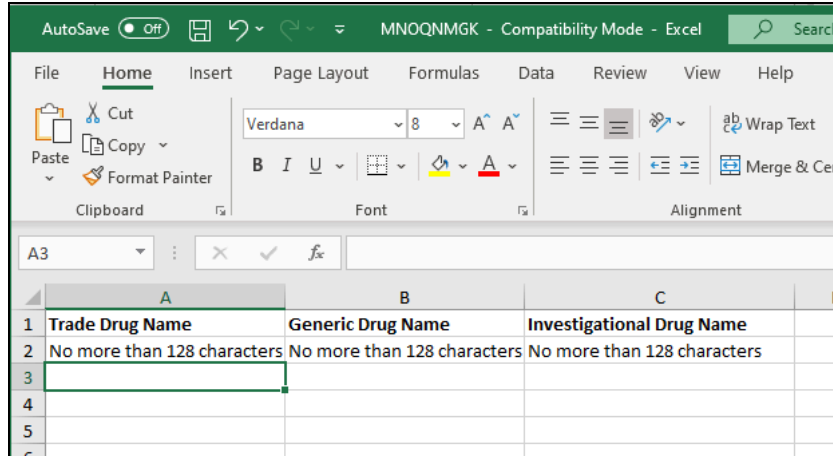
Click the **Cancel** button in the download dialog popup to close it without downloading the template.

Click the **Save** button in the download dialog popup to save the template to the default Downloads folder on the computer. Click the upward-pointing arrow to the right of the **Save** button to access Save As options, which allow for saving(s) the template to the user's desired location on the computer.

The download dialog popup message changes when the download is complete, as shown below.



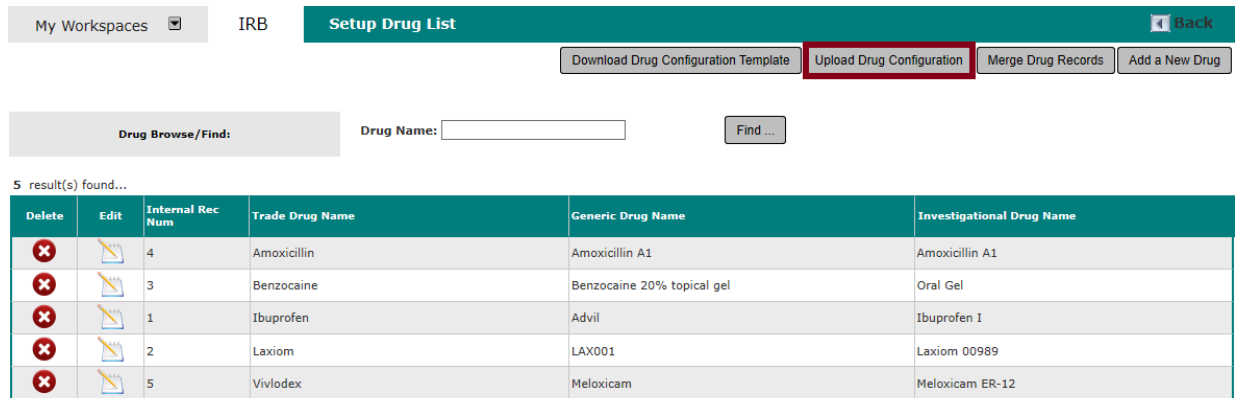
Navigate to the downloaded template file and open it.



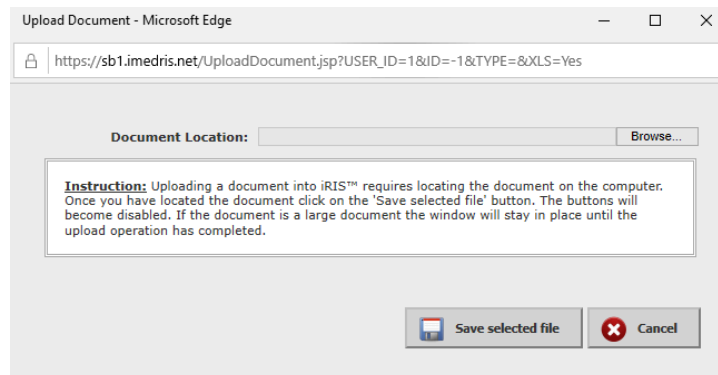
As shown in the screenshot above, field length limits are provided in the second row. Enter desired drug records to complete the template and save changes to the file.

### Upload Drug Configuration Template

When the Drug Template has been populated with all desired data, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link. The **Setup Drug List** page opens. Click the **Upload Drug Configuration** button.



An upload dialog popup appears.



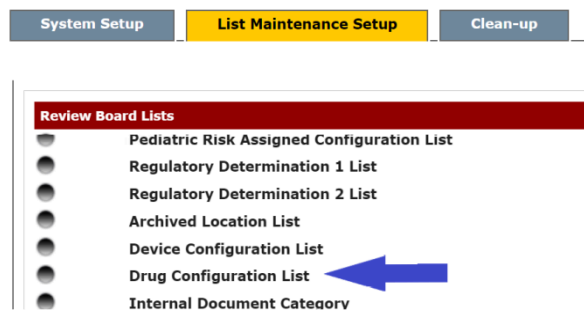
Click the **Cancel** button to close the dialog without completing the upload.

Click the **Browse...** button to navigate to the completed template and select it, then click the **Save selected file** button to complete the upload.

Review the uploaded records in the **Setup Drug List** page to ensure the uploaded records have correctly populated all columns. Any records that do not meet data content requirements must be edited or deleted promptly, to ensure they cannot be mistakenly assigned to studies.

## Edit Drug

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



The **Setup Drug List** page is opened. Click the icon in the **Edit** column for the applicable record.

The screenshot shows the "Setup Drug List" page. At the top, there are buttons for "Download Drug Configuration Template", "Upload Drug Configuration", "Merge Drug Records", and "Add a New Drug". Below these is a search bar with "Drug Name:" and a "Find ..." button. The main content is a table with 5 results found. The table has columns for "Delete", "Edit", "Internal Rec Num", "Trade Drug Name", "Generic Drug Name", and "Investigational Drug Name". The "Edit" column contains icons of a pencil and a document, which are highlighted with a red box in the image.

Delete	Edit	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
		4	Amoxicillin	Amoxicillin A1	Amoxicillin A1
		3	Benzocaine	Benzocaine 20% topical gel	Oral Gel
		1	Ibuprofen	Advil	Ibuprofen I
		2	Laxiom	LAX001	Laxiom 00989
		5	Viviodex	Meloxicam	Meloxicam ER-12

The record is opened in an **Edit a drug in the system** panel.

The screenshot shows the "Edit a drug in the system" panel. It features a "Save Changes" button at the top right. Below the header, there is a text input field with the placeholder "Edit a drug in the system.". The main form contains three rows of input fields: "Trade Name:" with the value "Advil", "Generic Name:" with the value "Ibuprofen" and a dropdown arrow, and "If not yet named, Investigational Name:" with the value "Ibuprofen I".

## IRB Assistant — List Maintenance*IRIS™*v13.01

Make desired changes and click the **Save Changes** button to save the record and close the edit panel. The record is revised on the **Setup Drug List** page.

The screenshot shows the 'Setup Drug List' page. At the top, there are tabs for 'My Workspaces' (selected) and 'IRB'. Below the tabs are buttons for 'Download Drug Configuration Template', 'Upload Drug Configuration', 'Merge Drug Records', and 'Add a New Drug'. A search bar labeled 'Drug Browse/Find:' contains the text 'Drug Name:' followed by an input field and a 'Find ...' button. Below the search bar, it says '5 result(s) found...'. A table displays the following data:

Delete	Edit	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
		1	Advil	Ibuprofen	Ibuprofen I
		4	Amoxicillin	Amoxicillin A1	Amoxicillin A1
		3	Benzocaine	Benzocaine 20% topical gel	Oral Gel
		2	Laxiom	LAX001	Laxiom 00989
		5	Vivlodex	Meloxicam	Meloxicam ER-12

## Delete Drug

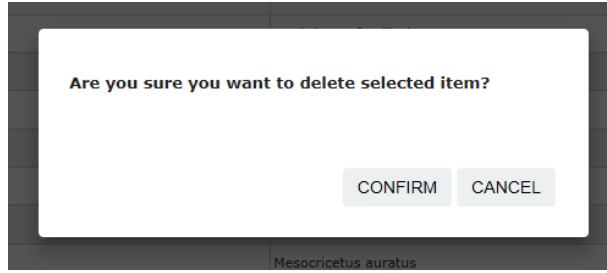
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.

The screenshot shows the 'List Maintenance Setup' page. At the top, there are tabs for 'System Setup', 'List Maintenance Setup' (selected), and 'Clean-up'. Below the tabs, there is a section titled 'Review Board Lists' with a list of links: 'Pediatric Risk Assigned Configuration List', 'Regulatory Determination 1 List', 'Regulatory Determination 2 List', 'Archived Location List', 'Device Configuration List', 'Drug Configuration List' (highlighted with a blue arrow), and 'Internal Document Category'.

The **Setup Drug List** page is opened. Click the icon in the **Delete** column for the applicable record.

The screenshot shows the 'Setup Drug List' page with the 'Delete' icon in the first row of the table highlighted with a red box. The table data is the same as in the previous screenshot.

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

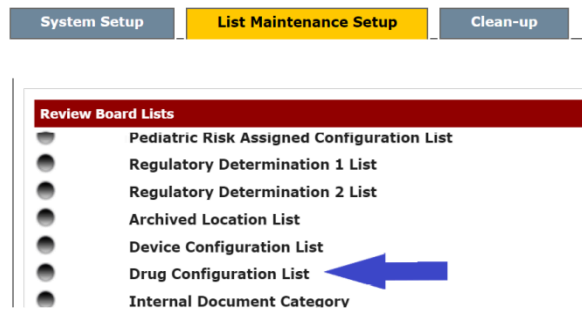
Click **CONFIRM** to complete deletion of the record and return to the **Setup Drug List** page.

### Merge Drug Records

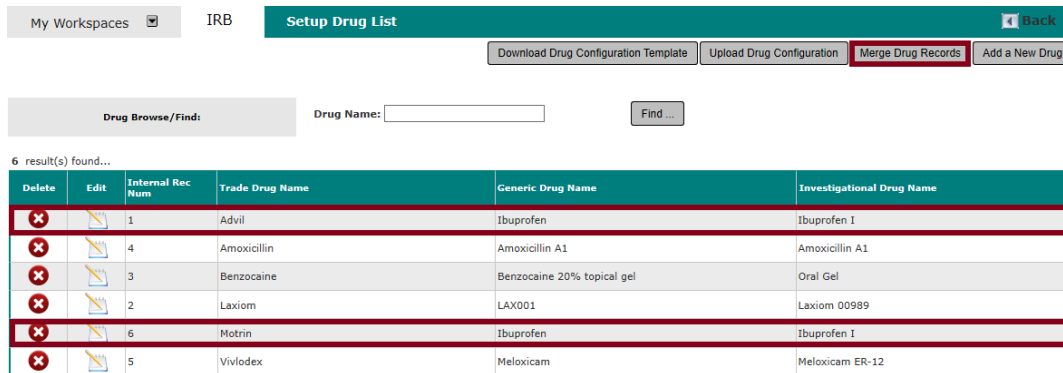
Sometimes a duplicate or erroneous drug record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous drug record can be merged with a valid drug record. The valid drug record is then substituted for the duplicate/erroneous drug record previously assigned to study applications.

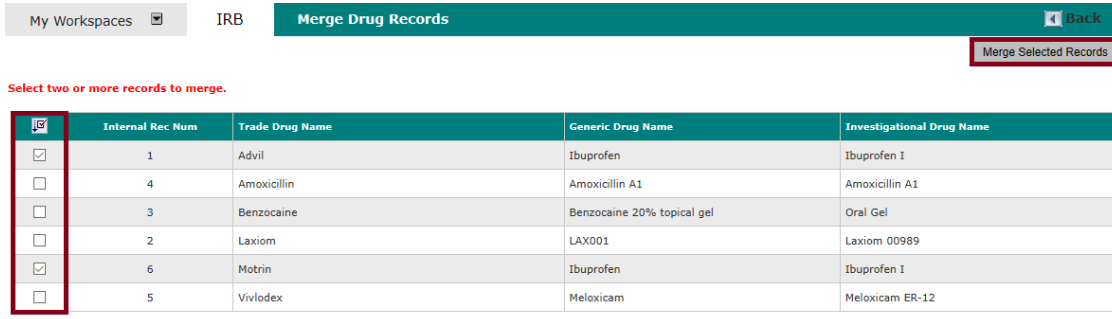
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



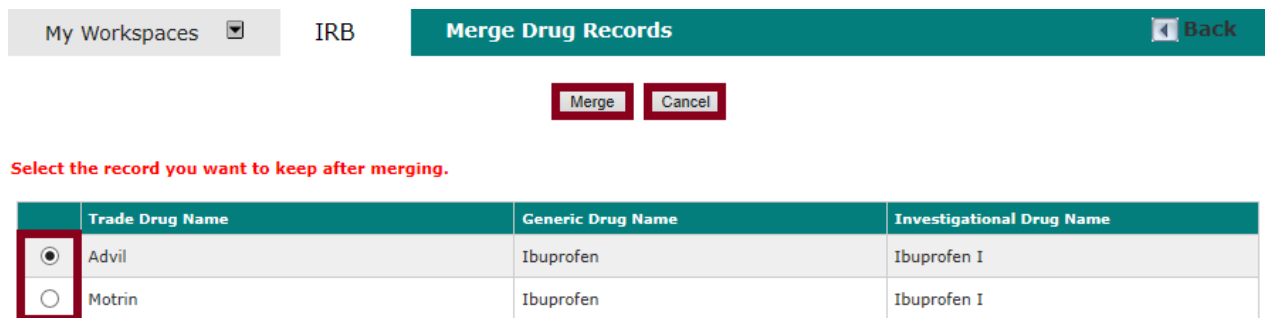
The **Setup Drug List** page is opened. Click the **Merge Drug Records** button.



In the example shown above, the “Motrin” drug record was created in error, as Motrin is another trade name for Ibuprofen and that drug is already in the list under the Trade Drug Name “Advil”. The Motrin record may have been assigned to one or more studies and must be merged with the “Advil” record. Click the **Merge Selected Records** button to begin. The **Merge Drug Records** page opens.

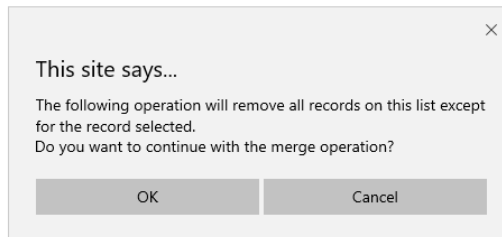


Select the checkboxes at far left for the drug records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.



Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Merge Drug Records** page, where the merge can be confirmed.

My Workspaces ▾ IRB Merge Drug Records Back

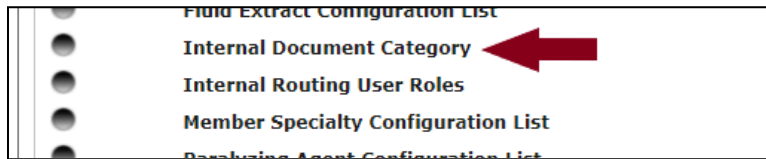
Merge Selected Records

Select two or more records to merge.

<input checked="" type="checkbox"/>	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
<input type="checkbox"/>	1	Advil	Ibuprofen	Ibuprofen I
<input type="checkbox"/>	4	Amoxicillin	Amoxicillin A1	Amoxicillin A1
<input type="checkbox"/>	3	Benzocaine	Benzocaine 20% topical gel	Oral Gel
<input type="checkbox"/>	2	Laxiom	LAX001	Laxiom 00989
<input type="checkbox"/>	5	Vivlodex	Meloxicam	Meloxicam ER-12

## Internal Document Category

The **Internal Document Category** list is where a list of standard, internal review board documents is maintained. To view the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



The **Setup Board Internal Document Category List** page is opened.

My Workspaces ▾ IRB Setup Board Internal Document Category List Back

Add a Document Category Delete Selected Document Category(s)

<input checked="" type="checkbox"/>	Edit	Document Category
<input type="checkbox"/>		Lab Equipment Cleaning Protocol
<input type="checkbox"/>		Rodent Care Sheet
<input type="checkbox"/>		Supplier Manifest

## Internal Document List Implementation – Application Side

The internal document list is employed in the following areas on the application side of iRIS™.

**Animal Procurement and Maintenance Information** section — any supporting document(s) pertaining to animal subject adoption procedures can be added to an IACUC / ARC study in the **Completed Experiment** section of the application form

**10.6 Completed Experiment**

Please note - To allow other PIs to utilize unused animals from your study when possible and encourage collaboration between PIs, "Internal transfer to another AUP" is automatically applied to all AUPs as an option for final disposition of animals. **\*\*Please note - animal transfers still need to be coordinated through the Attending Veterinarian's office.\*\***

Please check all possible final dispositions for the animals after the completed experiment or class:

- Animals remain under private ownership.
- Slaughter (using appropriate drug withdrawal times if applicable)
- Planned Euthanasia
- Release (field studies only)
- Other (Specify)

Please Specify:

Outside Agency/Institution Please Note: transfers must be coordinated through the Office of the Attending Veterinarian.

Please Specify:

Adoption

Describe your adoption procedures or upload your adoption policy or form.

**Add a New Document** **Add Multiple Documents**

Detach	Version	Sponsor Version	Title	Category	Expiration Date	Document Outcome	Checked Out	View Document
No Document(s) have been attached to this form.								

**Funding Questions** — any supporting document pertaining to funding can be added to a study in the **Funding Questions** section of the application form, as shown in the IACUC example below

**5.3 IACUC Funding Questions**

Please indicate source of funding

Internal  
 External  
 Both  
 None

Is there a grant, proposal, or scope of work associated with this AUP?

Yes  No

Please upload the grant, proposal, or scope of work and any additional documentation here or when you reach the Attach Documents screen near the end of the AUP submission process in IRIS.

Version	Sponsor Version	Title	Category	Expiration Date	Document Outcome	Checked Out	View Document
No Document(s) have been attached to this form.							

Name of funding source

View Details	Sponsor Name	Sponsor Type	Funding Through	Contract Type:	Project Number	Award Number
<input type="checkbox"/>	3-M Pharmaceuticals	Pharmaceutical				
Sponsor Name:		3-M Pharmaceuticals				
Sponsor Type:		Pharmaceutical				
Sponsor Role:						
Funding Through:						
<b>Is Institution the Primary Grant Holder:</b>		No				
Contract Type:						
Project Number:						
Award Number:						
Grant Title:						
PI Name: (If PI is not the same as identified on the study.)						
Explain Any Significant Discrepancy:						

Please list any internal funding associated with this application.

**Initial Review Submission Form** — internal study documents can be attached to the application in the **Other Study Documents** section

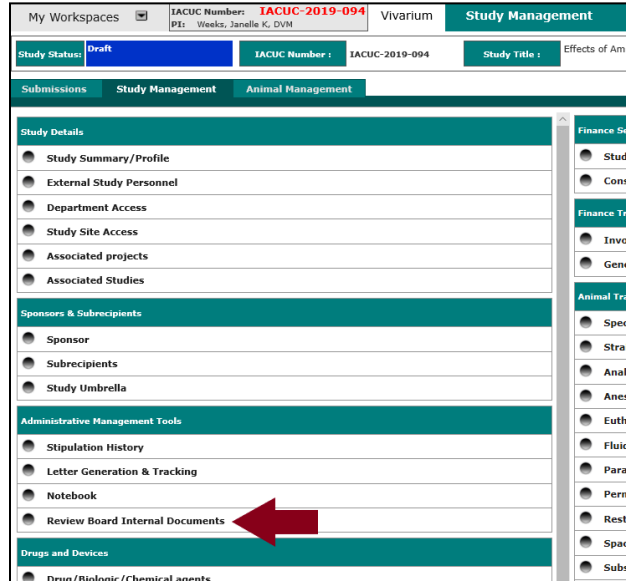
**4.0 Other Study Documents**

4.1 If a document was already attached in the Study Application, DO NOT upload it again here. This will create duplicates of documents which will need to be voided later. In this section, you can upload and attach any other study documents (e.g. protocol, investigator brochure, recruitment materials, instruments, case report forms, study handouts or other miscellaneous documents) that have not been attached as part of the Study Application. Click on the Help icon (?) on the right for instructions.

**Add a New Document** **Add Multiple Documents**

Detach	Version	Sponsor Version	Title	Category	Expiration Date	Document Outcome	Checked Out	View Document
No Document(s) have been attached to this form.								

**Review Board Internal Documents** — Review Board Internal Documents added to a study can be accessed on the application side via [module] > Find a Study > [study opened] > Study Management tab > Study Summary/Profile link > Study Management tab > Review Board Internal Documents link, as demonstrated in the IACUC example below



For more information about the study application, see the Study Assistant manual.

## Internal Document List Implementation – Board Side

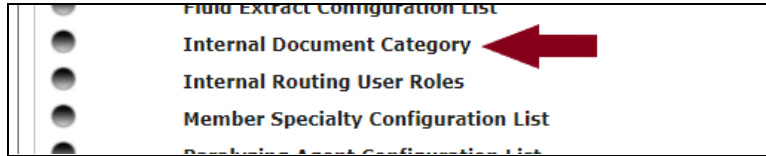
The internal document list is employed in the following areas on the review board / system setup side of iRIS™.

**Review Board Internal Documents add form** — board members can add internal documents via the Review Board Internal Documents add form

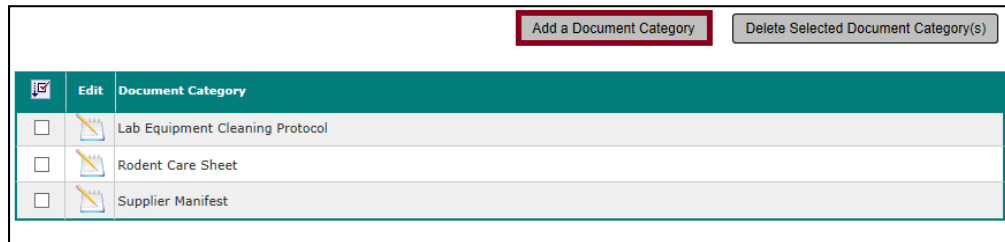
*Title:	Internal Document Attachment
*Version Number:	1 .0
Version Date:	02/17/2014
Category:	Additional Documents
Description:	Additional Documents Flyers Internal Document(s)
Load the document into iRIS:	Upload ...
Save the Document to my machine:	Download ...

## Add Internal Document Category

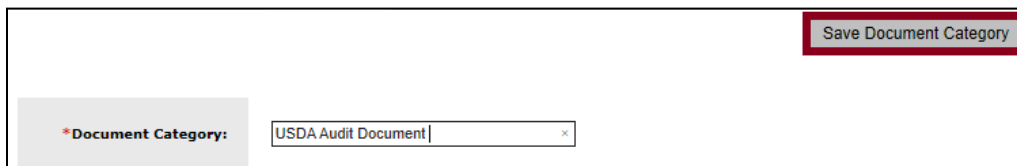
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



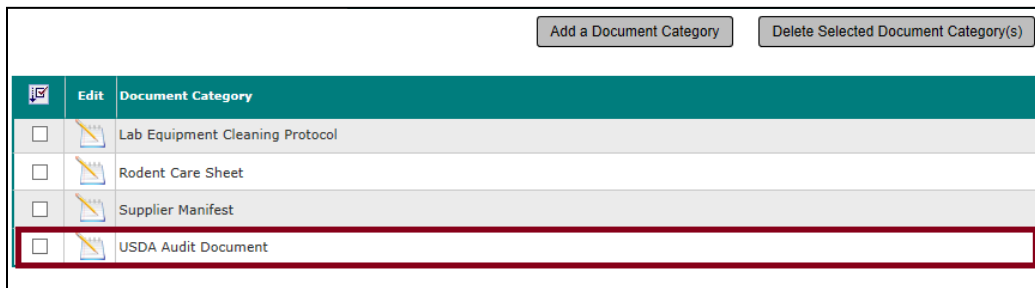
The **Setup Board Internal Document Category List** page is opened. Click the **Add a Document Category** button.



An add panel is opened for creation of the new record. Enter the new **Document Category** and click the **Save Document Category** button.

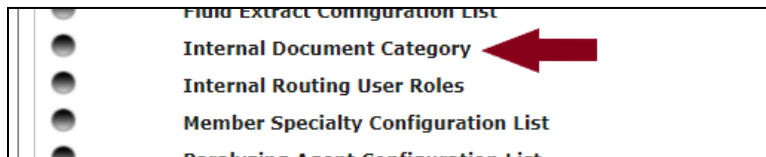


The record is added to the list on the main **Setup Board Internal Document Category List** page.



## Edit Internal Document Category

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



The **Setup Board Internal Document Category List** page is opened. Click the icon in the **Edit** column for the applicable record.

<input checked="" type="checkbox"/>	Edit	Document Category
<input type="checkbox"/>		Lab Equipment Cleaning Protocol
<input type="checkbox"/>		Rodent Care Sheet
<input type="checkbox"/>		Supplier Manifest
<input type="checkbox"/>		USDA Audit Document

The record is opened in an edit panel. Enter desired changes and click the **Save Document Category** button.

My Workspaces ▾ IRB **Setup Board Internal Document Category List** [Back](#)

**Save Document Category**

\*Document Category:

The record is revised on the main list page.

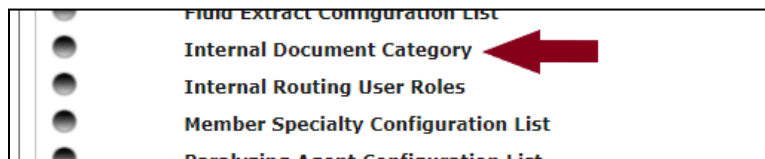
My Workspaces ▾ IRB **Setup Board Internal Document Category List** [Back](#)

[Add a Document Category](#) [Delete Selected Document Category\(s\)](#)

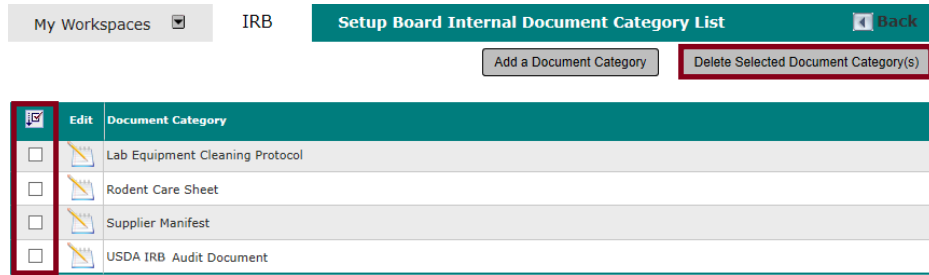
<input checked="" type="checkbox"/>	Edit	Document Category
<input type="checkbox"/>		Lab Equipment Cleaning Protocol
<input type="checkbox"/>		Rodent Care Sheet
<input type="checkbox"/>		Supplier Manifest
<input type="checkbox"/>		USDA IRB Audit Document

## Delete Internal Document Category

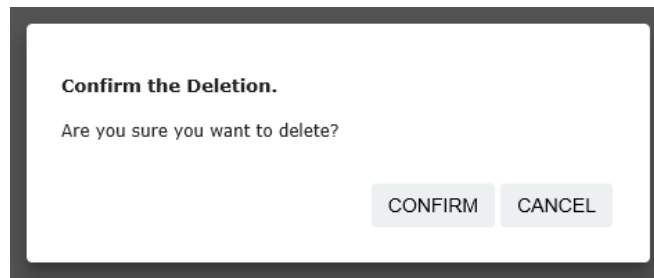
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



The **Setup Board Internal Document Category List** page is opened. Select the checkbox in the far-left column for the applicable record and click the **Delete Selected Document Category(s)** button.



A confirmation popup window appears.



Click **CANCEL** to close the popup without deleting the record.

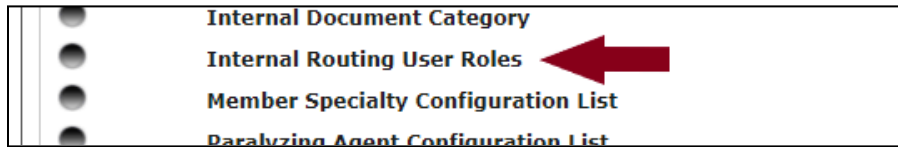
Click **CONFIRM** to delete the record and close the popup. The record is deleted from the list on the main **Setup Board Internal Document Category List** page.

## Internal Routing User Roles

Where the property `rb.useReviewRouting_user_role` is set to “Yes” (under IRB Assistant > Review Board Administration > Board Configuration Options > Submission Review Properties, see screenshot below), the iRIS™ system allows for setup and maintenance of an **Internal Routing User Roles** list, consisting of roles involved in study document review and signoff.

RB Properties List	Property Name	Property Value
	rb.use_restore_context_for_designated_reviewer	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_restore_context_for_emergency_use	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_restore_context_for_exempt	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_restore_context_for_expedited	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_restore_context_for_facilitated	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_restore_context_for_limited_review	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_review_comments	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_review_comments_ro	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_review_discussion	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_review_recommendations	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_review_stipulations	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_review_summary	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_reviewer	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_reviewer_coi_flag	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_show_restore_context_on_response_for_administrative	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_show_restore_context_on_response_for_committee_agenda	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_show_restore_context_on_response_for_designated_reviewer	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_show_restore_context_on_response_for_emergency_use	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_show_restore_context_on_response_for_exempt	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_show_restore_context_on_response_for_expedited	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_show_restore_context_on_response_for_facilitated	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_show_restore_context_on_response_for_limited_review	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_study_followup	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_submission_by_committee	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_submission_letters	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_submission_outstanding_board_tasks	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.use_submission_vote_summary	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.use_total_award	<input type="radio"/> Yes <input checked="" type="radio"/> No
	rb.useReviewRouting	<input checked="" type="radio"/> Yes <input type="radio"/> No
	rb.useReviewRouting_user_role	<input checked="" type="radio"/> Yes <input type="radio"/> No

To access the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



The **Setup Internal Routing User Roles List** page is opened.

		<input type="button" value="Add a User Role"/>	<input type="button" value="Delete Selected Role(s)"/>
Vivarium list of internal routing user roles.			
<input checked="" type="checkbox"/>	Edit	User Role	
<input type="checkbox"/>		ACORP Pre-reviewer	

## Internal Routing User Role List Implementation – Application Side

The internal routing user role list is employed in the following areas on the application side of iRIS™.

**Study Application** — the internal routing user role dropdown is employed when making internal routing assignments for a submission

Order Number	Click to review	Assignment Comments			
		Assigned To	Role	Date Notified	Date Completed
		User Comments			
0		Assignment Comments:			
		admin, Admin Admin, Ph.D. Brig. Gen.	--none--		
		User Comments:	--none--		
			ACORP Pre-Reviewer		
			ACORP Reviewer		

**Study Application** — the internal routing user role dropdown is employed in the **Assign Reviewers** section of the **Pre-review Screening** tab

Note that selection of an Ad Hoc reviewer role unlocks fields for selection of a named reviewer.

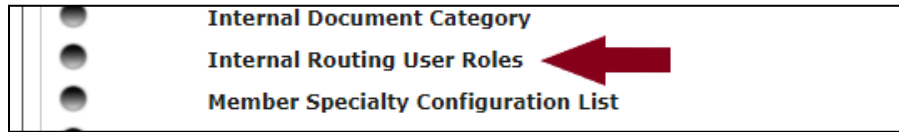
For more information about the study application, see the Study Assistant Manual.

### Internal Routing User Role List Implementation – Board Side

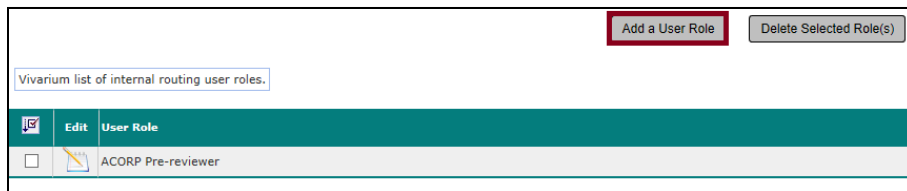
The internal routing user role list is utilized during Pre-Review screening, as described in the previous section, and routing assignments made at that time are not generally subject to direct revision by the board.

### Add Internal Routing User Role

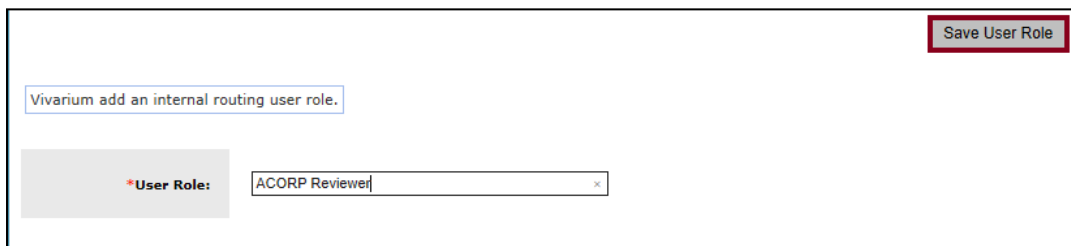
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



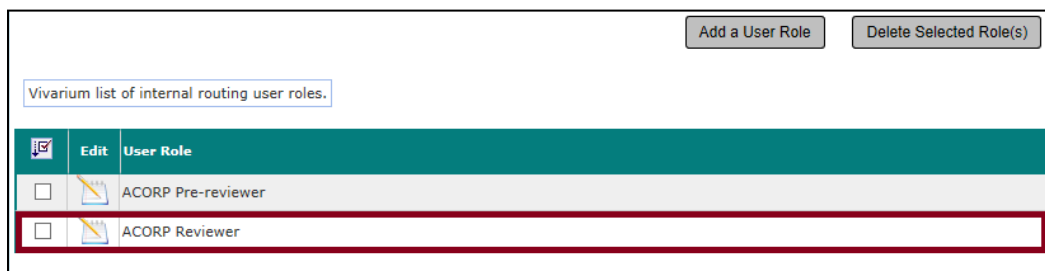
The **Setup Internal Routing User Roles List** page is opened. Click the **Add a User Role** button.



An **add an internal routing user role** panel is opened for creation of the new record. Enter the new **User Role** and click the **Save User role** button.

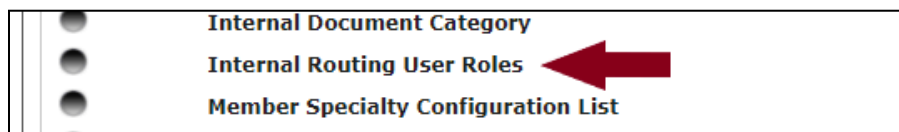


The add panel is closed and the record is added to the list on the **Setup Internal Routing User Roles List** page.

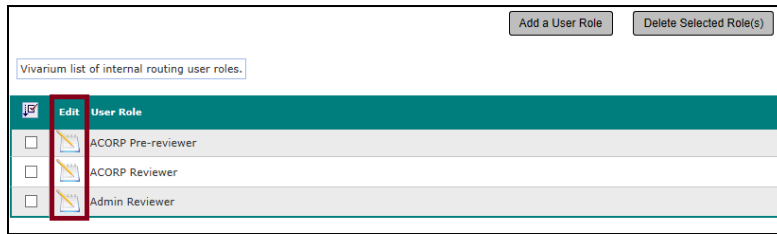


### Edit Internal Routing User Role

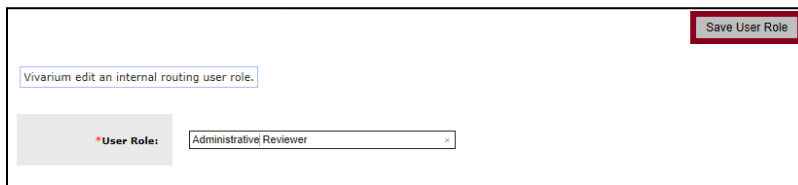
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



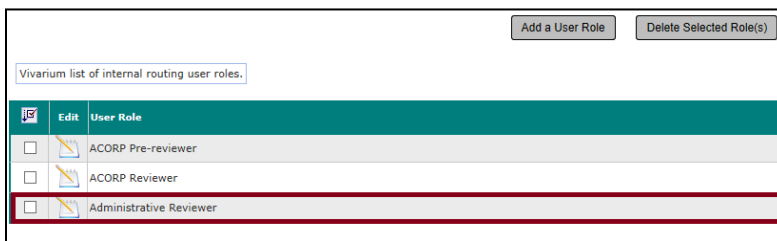
The **Setup Internal Routing User Roles List** page is opened. Click the icon in the **Edit** column for the applicable record.



An **edit an internal routing user role** panel is opened. Enter desired changes and click the **Save User Role** button.

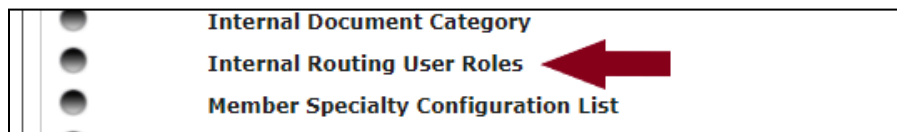


The edit panel is closed, and the record is revised on the **Setup Internal Routing User Roles List** page.

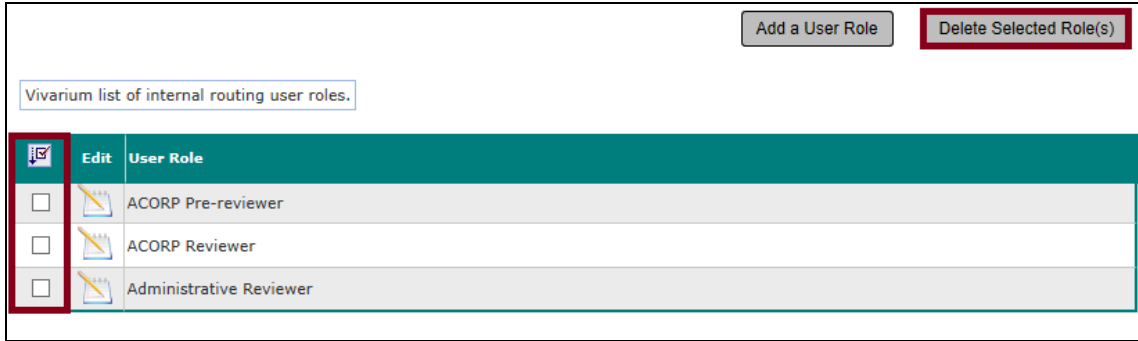


## Delete Internal Routing User Role

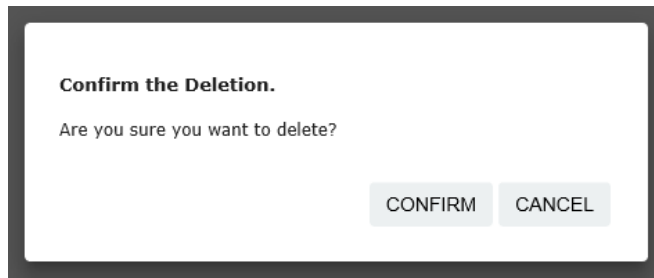
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



The **Setup Internal Routing User Roles List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Role(s)** button.



A confirmation popup window appears.

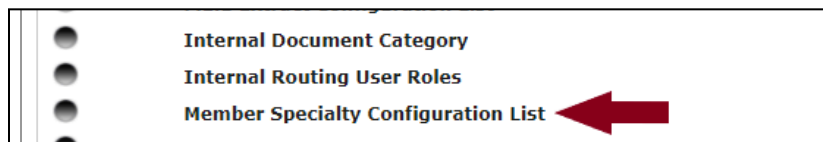


Click **CANCEL** to close the popup without deleting the record.

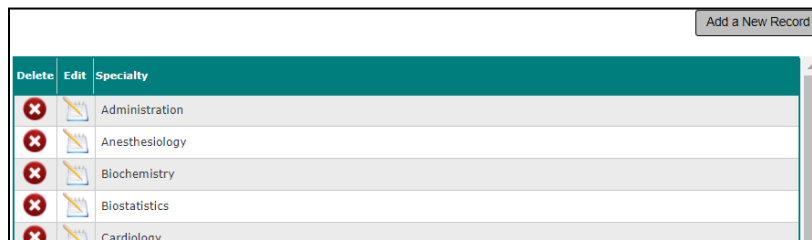
Click **CONFIRM** to delete the record and close the popup. The record is deleted from the list on the main **Setup Internal Routing User Roles List** page.

## Member Specialty Configuration List

The **Member Specialty Configuration List** is where a list of review board member academic or medical specialties is maintained in the iRIS™ system. To access the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Member Specialty Configuration List** link.



The **System Administration – Member Specialty** page is opened.



## Member Specialty List Implementation – Application Side

The member specialty list is employed on the review board side only.

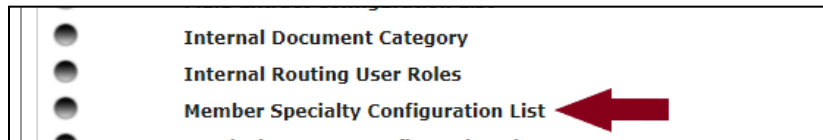
## Member Specialty List Implementation – Board Side

Member specialties are added to review board member user profiles at the time the system administrator sets up their iRIS™ user accounts, and the specialty configuration list is also made available as a dropdown picklist when guests are added to the meeting attendance section for a meeting agenda (shown below).

\*Guest Name:   
\*Specialty: --none--  
\*Affiliation:

## Add Member Specialty

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Member Specialty Configuration List** link.



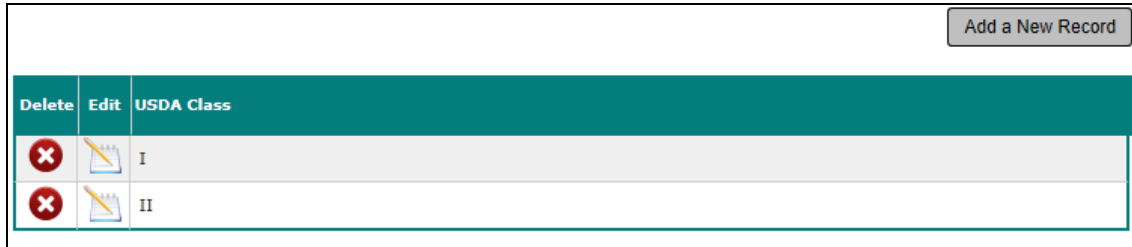
The **System Administration – Member Specialty** page is opened. Click the **Add a New Record** button.

Delete	Edit	Specialty
		Administration
		Anesthesiology
		Biochemistry
		Biostatistics
		Cardiology

An add panel is opened. Enter the **Specialty** and click the **Save Record** button.

\* Specialty:

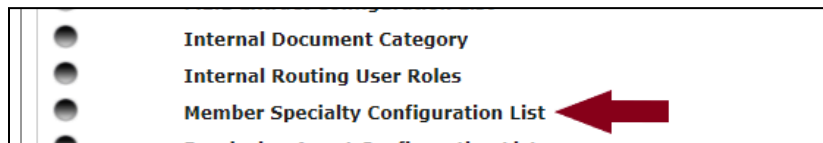
The record is added to the **System Administration – Member Specialty** list page.



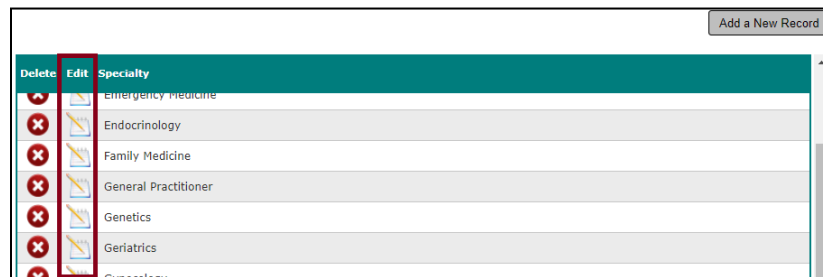
Delete	Edit	USDA Class
		I
		II

## Edit Member Specialty

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Member Specialty Configuration List** link.

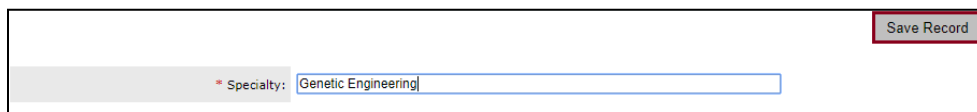


The **System Administration – Member Specialty** page is opened. Click the icon in the **Edit** column for the applicable record.

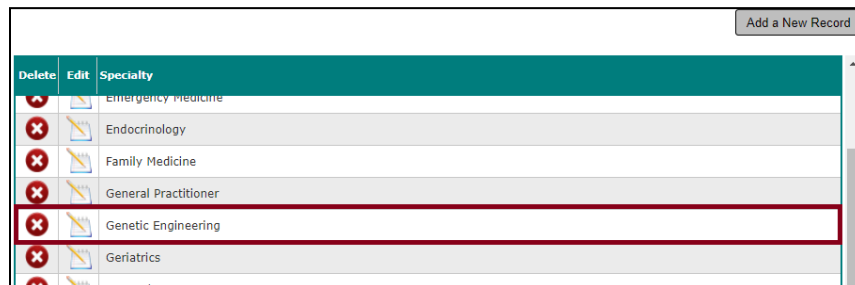


Delete	Edit	Specialty
		Emergency Medicine
		Endocrinology
		Family Medicine
		General Practitioner
		Genetics
		Geriatrics
		Gynecology

The record is opened in an edit panel.



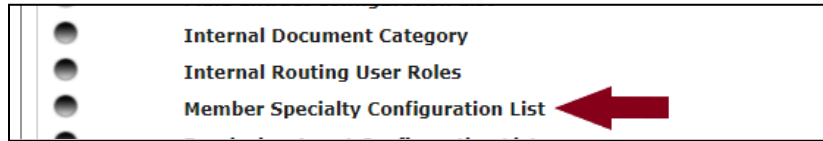
Make desired changes and click the **Save Record** button. The record is revised on the **System Administration – Member Specialty** list page.



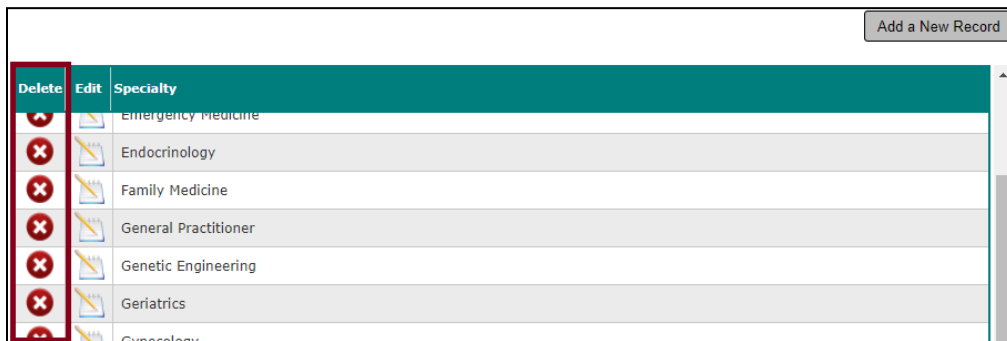
Delete	Edit	Specialty
		Emergency Medicine
		Endocrinology
		Family Medicine
		General Practitioner
		Genetic Engineering
		Geriatrics
		Gynecology

## Delete Member Specialty

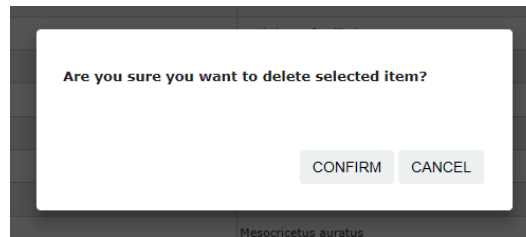
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Member Specialty Configuration List** link.



The **System Administration – Member Specialty** page is opened. Click the icon in the **Delete** column for the applicable record.

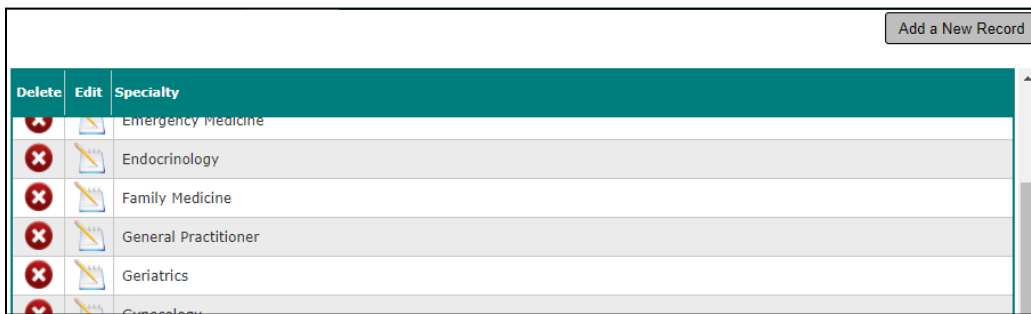


A confirmation popup window displays.



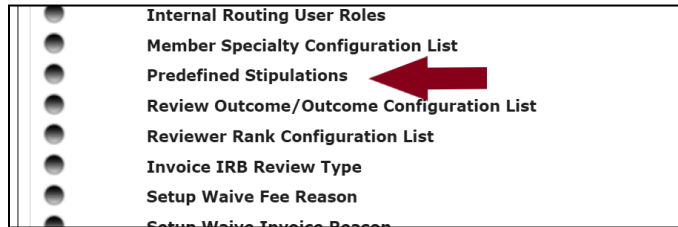
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record and return to the **System Administration – Member Specialty** list page. The record is deleted from the list.

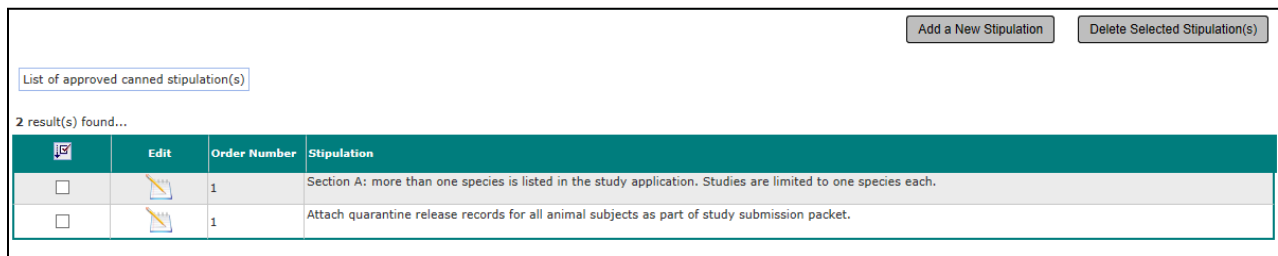


## Predefined Stipulations

The Predefined Stipulations list is where boilerplate stipulations approved by the institution for use in studies is maintained in the iRIS™ system. To view the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened.

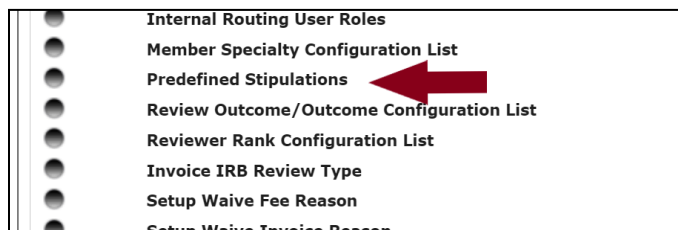


The screenshot shows the 'Setup Stipulation' page. At the top right, there are two buttons: 'Add a New Stipulation' and 'Delete Selected Stipulation(s)'. Below them is a search box containing 'List of approved canned stipulation(s)'. The text '2 result(s) found...' is displayed above a table. The table has a teal header with columns: a checkbox, 'Edit', 'Order Number', and 'Stipulation'. There are two rows of data, each with a checkbox, an 'Edit' icon, the number '1', and a text description of a stipulation.

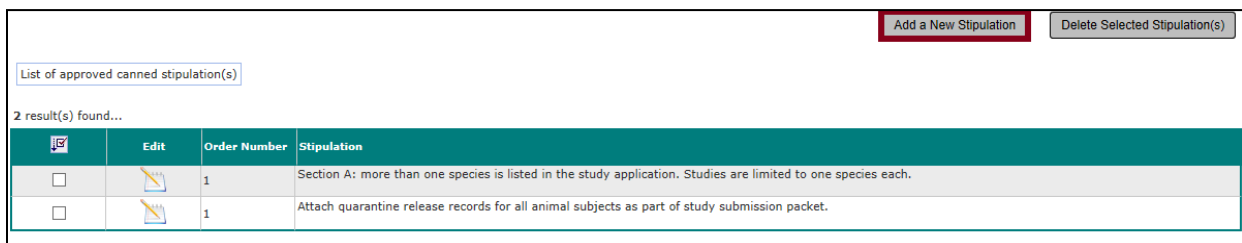
<input type="checkbox"/>	Edit	Order Number	Stipulation
<input type="checkbox"/>		1	Section A: more than one species is listed in the study application. Studies are limited to one species each.
<input type="checkbox"/>		1	Attach quarantine release records for all animal subjects as part of study submission packet.

## Add Predefined Stipulation

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened. Click the **Add a New Stipulation** button.



The screenshot shows the 'Setup Stipulation' page. At the top right, the 'Add a New Stipulation' button is highlighted with a red border. The rest of the page content is identical to the previous screenshot, showing the search box, the number of results, and the table of stipulations.

The **Add a stipulation to the system** panel is opened.

Enter desired stipulation text in the **Stipulation Content** area. Use the toolbar buttons to format the text, insert links or insert images. Enter a numeric **Order** value to indicate routing priority order for the stipulation.

If stipulation categories are in use at the institution (property rb.use\_stipulation\_category set to “Yes” under IRB Assistant > Review Board Administration > Board Configuration Options > Recommendations and Stipulations) a **Category** field is also included at the top of the page, as shown below. Select the applicable **Category** from the dropdown list.

In the example below, the add panel is complete. Click the **Save Stipulation** button to save the new record and close the add panel.

The new stipulation is added on the main **Setup Stipulation** list page.

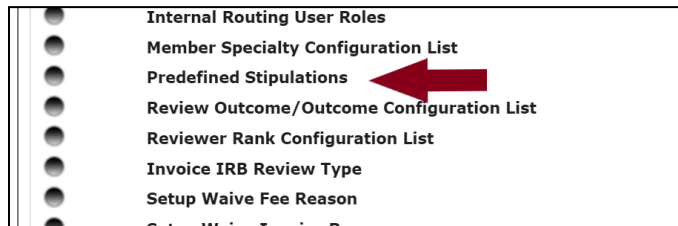
List of approved canned stipulation(s)

3 result(s) found...

<input checked="" type="checkbox"/>	Edit	Order Number	Stipulation
<input type="checkbox"/>		1	Section A: more than one species is listed in the study application. Studies are limited to one species each.
<input type="checkbox"/>		1	Attach quarantine release records for all animal subjects as part of study submission packet.
<input type="checkbox"/>		2	Attach copy(ies) of USDA facilities audit inspection sign off document(s) to application.

## Edit Predefined Stipulation

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened. Click the icon in the **Edit** column for the applicable record.

List of approved canned stipulation(s)

3 result(s) found...

<input checked="" type="checkbox"/>	Edit	Order Number	Stipulation
<input type="checkbox"/>		1	Section A: more than one species is listed in the study application. Studies are limited to one species each.
<input type="checkbox"/>		1	Attach quarantine release records for all animal subjects as part of study submission packet.
<input type="checkbox"/>		2	Attach copy(ies) of USDA facilities audit inspection sign off document(s) to application.

The selected record is opened in an **Edit a pre-defined system stipulation** panel.

Edit a pre-defined system stipulation.

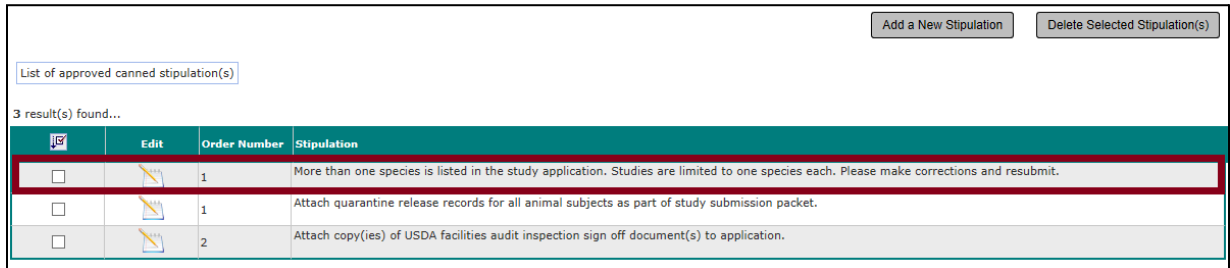
\*Stipulation Content:

More than one species is listed in the study application. Studies are limited to one species each. Please make corrections and resubmit.

\*Order:

Note that if stipulation categories are in use at the institution (property `rb.use_stipulation_category` set to “Yes” under IRB Assistant > Review Board Administration > Board Configuration Options > Recommendations and Stipulations) a **Category** field is included in the edit panel.

Make desired changes and click the **Save Stipulation** button to save changes and close the edit panel. The record is updated on the **Setup Stipulation** list page.



Buttons: Add a New Stipulation, Delete Selected Stipulation(s)

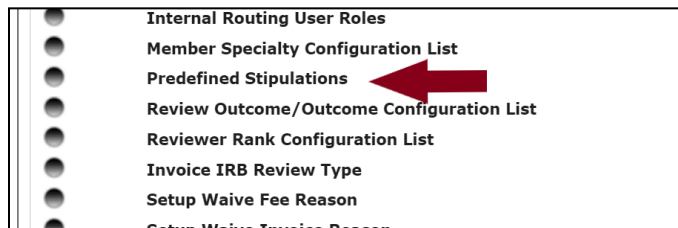
List of approved canned stipulation(s)

3 result(s) found...

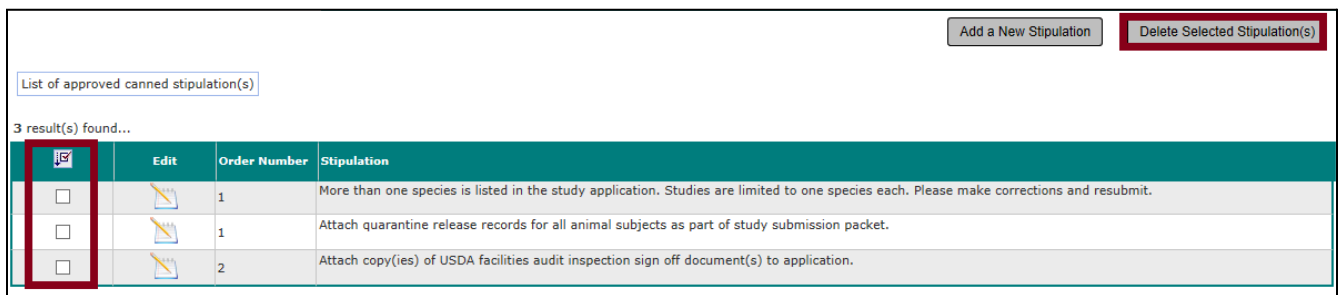
<input checked="" type="checkbox"/>	Edit	Order Number	Stipulation
<input type="checkbox"/>		1	More than one species is listed in the study application. Studies are limited to one species each. Please make corrections and resubmit.
<input type="checkbox"/>		1	Attach quarantine release records for all animal subjects as part of study submission packet.
<input type="checkbox"/>		2	Attach copy(ies) of USDA facilities audit inspection sign off document(s) to application.

## Delete Predefined Stipulation

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Stipulation(s)** button.



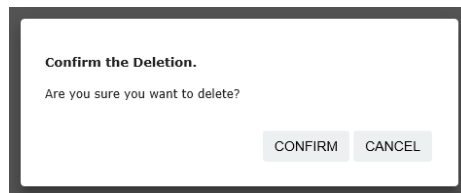
Buttons: Add a New Stipulation, Delete Selected Stipulation(s)

List of approved canned stipulation(s)

3 result(s) found...

<input checked="" type="checkbox"/>	Edit	Order Number	Stipulation
<input type="checkbox"/>		1	More than one species is listed in the study application. Studies are limited to one species each. Please make corrections and resubmit.
<input type="checkbox"/>		1	Attach quarantine release records for all animal subjects as part of study submission packet.
<input type="checkbox"/>		2	Attach copy(ies) of USDA facilities audit inspection sign off document(s) to application.

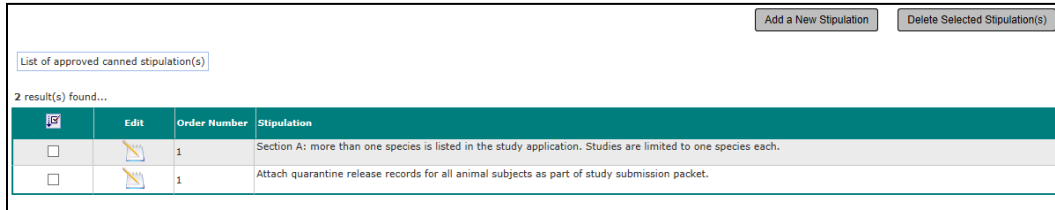
A confirmation popup window displays.



## IRB Assistant — List Maintenance iRIS™ v13.01

Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Stipulation** page. The record is deleted from the **Setup Stipulation** page.



Buttons: Add a New Stipulation, Delete Selected Stipulation(s)

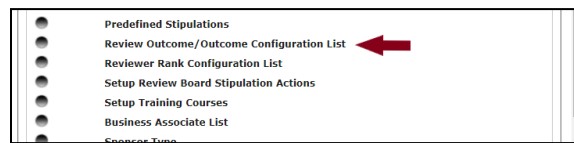
List of approved canned stipulation(s)

2 result(s) found...

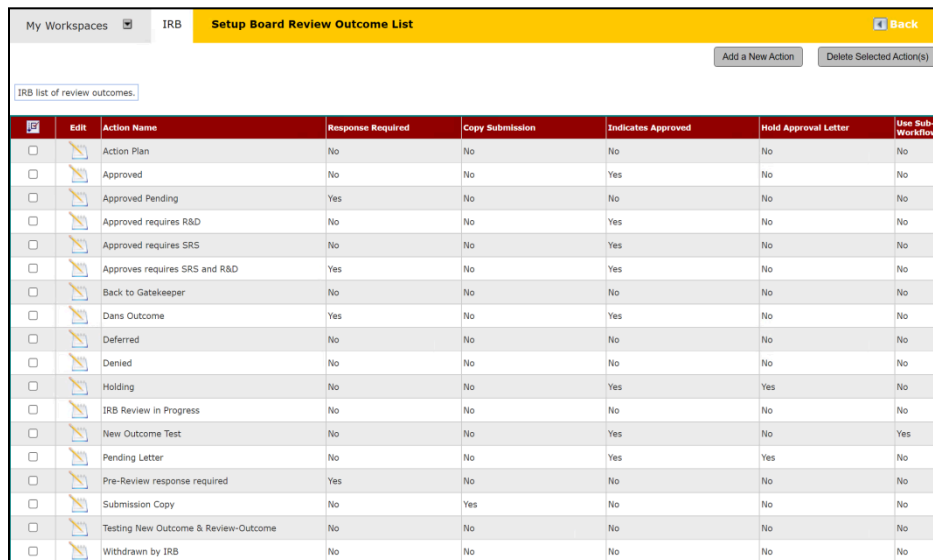
<input type="checkbox"/>	Edit	Order Number	Stipulation
<input type="checkbox"/>		1	Section A: more than one species is listed in the study application. Studies are limited to one species each.
<input type="checkbox"/>		1	Attach quarantine release records for all animal subjects as part of study submission packet.

## Review Outcome/Outcome Configuration List

The Review Outcome / Outcome Configuration list is where a list of predefined review outcomes is maintained in the iRIS™ system. To view the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened.



My Workspaces IRB Setup Board Review Outcome List Back

Buttons: Add a New Action, Delete Selected Action(s)

IRB list of review outcomes.

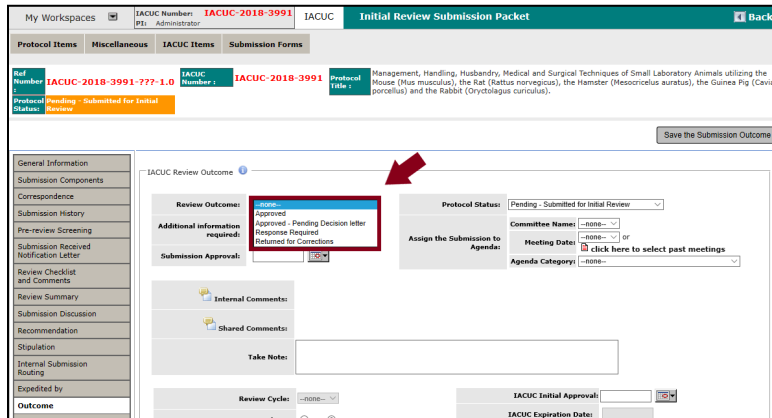
<input type="checkbox"/>	Edit	Action Name	Response Required	Copy Submission	Indicates Approved	Hold Approval Letter	Use Sub-Workflow
<input type="checkbox"/>		Action Plan	No	No	No	No	No
<input type="checkbox"/>		Approved	No	No	Yes	No	No
<input type="checkbox"/>		Approved Pending	Yes	No	No	No	No
<input type="checkbox"/>		Approved requires R&D	No	No	Yes	No	No
<input type="checkbox"/>		Approved requires SRS	No	No	Yes	No	No
<input type="checkbox"/>		Approves requires SRS and R&D	Yes	No	Yes	No	No
<input type="checkbox"/>		Back to Gatekeeper	No	No	No	No	No
<input type="checkbox"/>		Dans Outcome	Yes	No	Yes	No	No
<input type="checkbox"/>		Deferred	No	No	No	No	No
<input type="checkbox"/>		Denied	No	No	No	No	No
<input type="checkbox"/>		Holding	No	No	Yes	Yes	No
<input type="checkbox"/>		IRB Review in Progress	No	No	No	No	No
<input type="checkbox"/>		New Outcome Test	No	No	Yes	No	Yes
<input type="checkbox"/>		Pending Letter	No	No	Yes	Yes	No
<input type="checkbox"/>		Pre-Review response required	Yes	No	No	No	No
<input type="checkbox"/>		Submission Copy	No	Yes	No	No	No
<input type="checkbox"/>		Testing New Outcome & Review-Outcome	No	No	No	No	No
<input type="checkbox"/>		Withdrawn by IRB	No	No	No	No	No

## Review Outcome List Implementation – Application Side

Review outcomes are generally assigned by the applicable review board, making this functionality inapplicable on the application side.

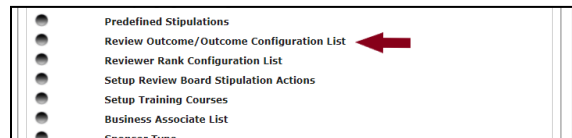
## Review Outcome List Implementation – Board Side

The review outcome list is employed in the Outcome tab within submission processing screens, as shown in the IACUC example below.



## Add Review Outcome

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened. Click the **Add a New Action** button.

☐	✎	Action Name	Response Required	Copy Submission	Indicates Approved	Hold Approval Letter	Use Sub-Workflow
<input type="checkbox"/>		Action Plan	No	No	No	No	No
<input type="checkbox"/>		Approved	No	No	Yes	No	No
<input type="checkbox"/>		Approved Pending	Yes	No	No	No	No
<input type="checkbox"/>		Approved requires R&D	No	No	Yes	No	No
<input type="checkbox"/>		Approved requires SRS	No	No	Yes	No	No
<input type="checkbox"/>		Approves requires SRS and R&D	Yes	No	Yes	No	No
<input type="checkbox"/>		Back to Gatekeeper	No	No	No	No	No

The **add a review outcome** panel is opened. Note that all fields default to a selection of “No”.

A selection of “Yes” for **Response Required** means that where this outcome is assigned, an application / submission will be returned and held from further progress until the required response is received.

A selection of “Yes” for **Submission Copy Required** means that where this outcome is assigned, a copy of the submission will be added to the Not Assigned queue. This option is typically used for tabled submissions that are to be assigned to a future meeting.

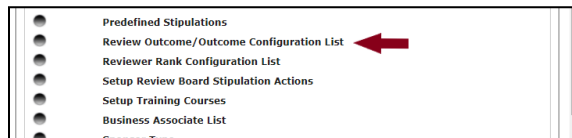
A selection of “Yes” for **Use Sub-Workflow** means that where this outcome is assigned, the system will trigger a sub-workflow that must be completed before submission for final approval.

Enter a **Review Outcome** and click to select “Yes” or “No” for **Response Required**, **Submission Copy required** and **Use Sub-Workflow**, then click the **Save Review Outcome** button.

The record is added on the main **Setup Board Review Outcome List** page.

### Edit Review Outcome

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened. Click the icon in the **Edit** column for the applicable record.

<input type="checkbox"/>	Edit	Action Name	Response Required	Copy Submission	Indicates Approved	Hold Approval Letter	Use Sub-Workflow
<input type="checkbox"/>		Action Plan	No	No	No	No	No
<input type="checkbox"/>		Approved	No	No	Yes	No	No
<input type="checkbox"/>		Approved Pending	Yes	No	No	No	No
<input type="checkbox"/>		Approved requires R&D	No	No	Yes	No	No
<input type="checkbox"/>		Approved requires SRS	No	No	Yes	No	No
<input type="checkbox"/>		Approves requires SRS and R&D	Yes	No	Yes	No	No
<input type="checkbox"/>		Back to Gatekeeper	No	No	No	No	No
<input type="checkbox"/>		Dans Outcome	Yes	No	Yes	No	No
<input type="checkbox"/>		Deferred	No	No	No	No	No
<input type="checkbox"/>		Denied	No	No	No	No	No
<input type="checkbox"/>		Holding	No	No	Yes	Yes	No
<input type="checkbox"/>		IRB Review in Progress	No	No	No	No	No
<input type="checkbox"/>		New Outcome Test	No	No	Yes	No	Yes
<input type="checkbox"/>		Pending Letter	No	No	Yes	Yes	No
<input type="checkbox"/>		Pre-Review response required	Yes	No	No	No	No
<input type="checkbox"/>		Submission Copy	No	Yes	No	No	No
<input type="checkbox"/>		Testing New Outcome & Review-Outcome	No	No	No	No	No
<input type="checkbox"/>		Withdrawn by IRB	No	No	No	No	No

The record is opened in an **edit a review outcome** panel.

IRB edit a review outcome.

\*Review Outcome:

\*Response Required:  Yes  No

\*Submission Copy required:  Yes  No

\*Action indicates an Approved Status:  Yes  No

\*Hold Approval Letter:  Yes  No

\*Use Sub-Workflow:  Yes  No

A selection of “Yes” for **Response Required** means that where this outcome is assigned, an application / submission will be returned and held from further progress until the required response is received.

A selection of “Yes” for **Submission Copy Required** means that where this outcome is assigned, a copy of the submission will be added to the Not Assigned queue. This option is typically used for tabled submissions that are to be assigned to a future meeting.

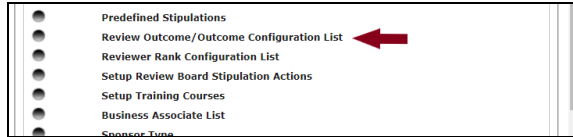
A selection of “Yes” for **Use Sub-Workflow** means that where this outcome is assigned, the system will trigger a sub-workflow that must be completed before submission for final approval.

Make desired changes and click the **Save Review Outcome** button.

The edit panel is closed, and the record is updated on the **Setup Board Review Outcome List** page.

## Delete Review Outcome

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted, then click the **Delete Selected Action(s)** button.

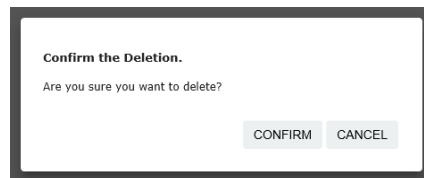
My Workspaces ▾ IRB **Setup Board Review Outcome List** Back

Add a New Action Delete Selected Action(s)

IRB list of review outcomes.

<input type="checkbox"/>	Edit	Action Name	Response Required	Copy Submission	Indicates Approved	Hold Approval Letter	Use Sub-Workflow
<input type="checkbox"/>		Action Plan	No	No	No	No	No
<input type="checkbox"/>		Approved	No	No	Yes	No	No
<input type="checkbox"/>		Approved Pending	Yes	No	No	No	No
<input type="checkbox"/>		Approved requires R&D	No	No	Yes	No	No
<input type="checkbox"/>		Approved requires SRS	No	No	Yes	No	No
<input type="checkbox"/>		Approves requires SRS and R&D	Yes	No	Yes	No	No
<input type="checkbox"/>		Back to Gatekeeper	No	No	No	No	No
<input type="checkbox"/>		Dans Outcome	Yes	No	Yes	No	No
<input type="checkbox"/>		Deferred	No	No	No	No	No
<input type="checkbox"/>		Denied	No	No	No	No	No
<input type="checkbox"/>		Holding	No	No	Yes	Yes	No
<input type="checkbox"/>		IRB Review in Progress	No	No	No	No	No
<input type="checkbox"/>		New Outcome Test	No	No	Yes	No	Yes
<input type="checkbox"/>		Pending Letter	No	No	Yes	Yes	No
<input type="checkbox"/>		Pre-Review response required	Yes	No	No	No	No
<input type="checkbox"/>		Submission Copy	No	Yes	No	No	No
<input type="checkbox"/>		Testing New Outcome & Review-Outcome	No	No	No	No	No
<input type="checkbox"/>		Withdrawn by IRB	No	No	No	No	No

A confirmation popup window displays.

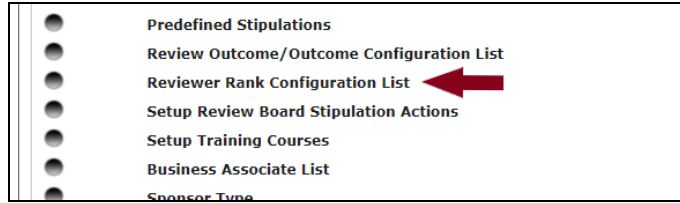


Click **CANCEL** to close the popup without deleting the record.

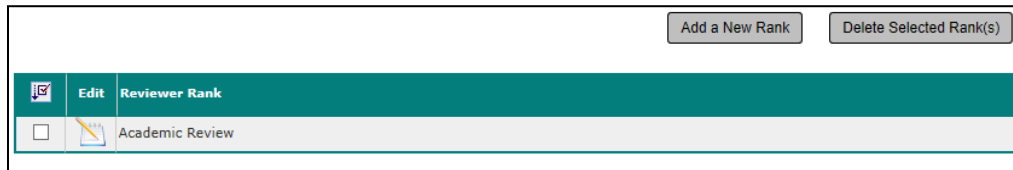
Click **CONFIRM** to complete deletion of the record. The popup closes and the record is deleted from the **Setup Board Review Outcome List** page.

## Reviewer Rank Configuration List

The Reviewer Rank Configuration List is where a list of predefined reviewer ranks is maintained in the iRIS™ system. To view the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.



The Setup Reviewer Rank List page is opened.



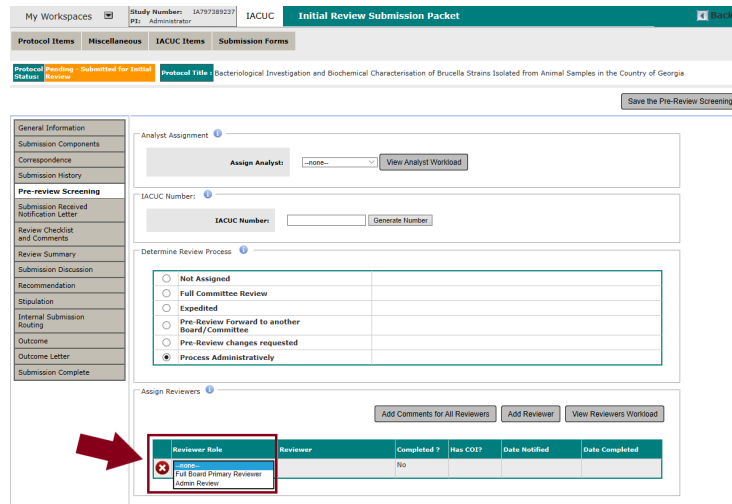
### Reviewer Rank List Implementation – Application Side

Reviewer ranks are generally assigned and tracked by the Coordinator and/or applicable review board, making this functionality inapplicable on the application side.

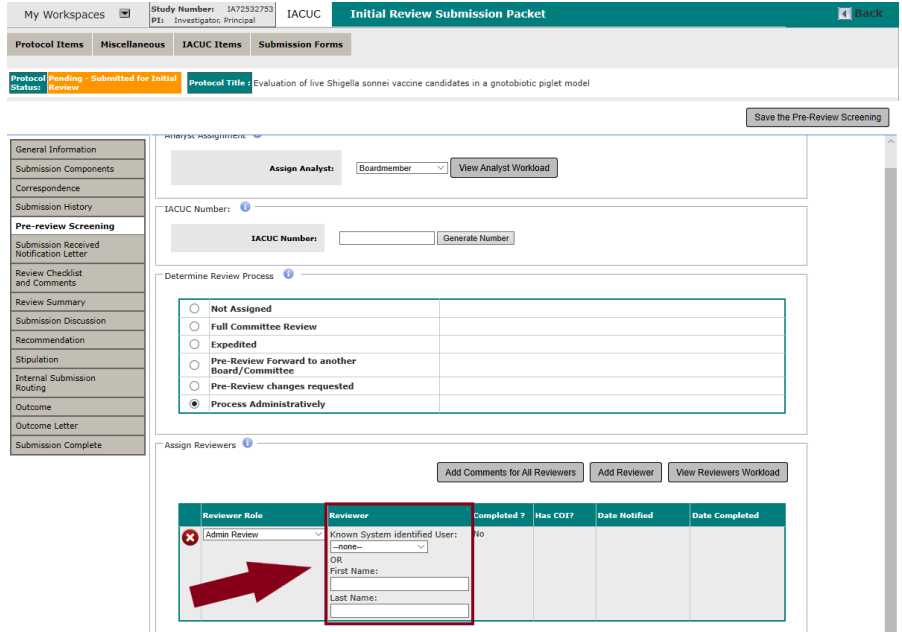
### Reviewer Rank List Implementation – Board Side

The reviewer rank list is employed in the following areas on the review board / system setup side of iRIS™.

**Study Application** — the Reviewer Rank List is employed on the **Pre-review Screening** tab of the **Initial Review Submission Packet**, which is accessed via [module name] > Submissions > [submission opened for editing], as shown in the IACUC example below

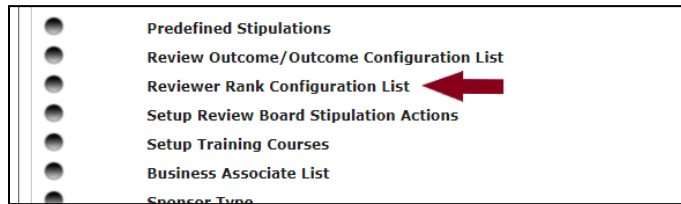


If the reviewer rank selected in the **Reviewer Role** column is an Ad Hoc rank, additional fields populate in the **Reviewer** column for entry of the reviewer name.

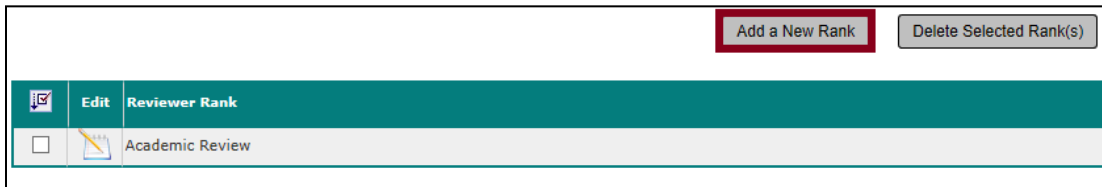


### Add Reviewer Rank

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.



The **Setup Reviewer Rank List** page is opened. Click the **Add a New Rank** button.



An add panel is opened for creation of the new record.

**\* Reviewer Rank:** Full Board Primary Reviewer

**\* Is this the label for an Ad Hoc Reviewer:**  Yes  No

**\* If this is not an Ad Hoc Reviewer please add the Rank ( i.e. 1, 2, 3):** 1

Save Reviewer Rank

Enter a **Reviewer Rank**.

Click to select “Yes” or “No” for **Is this the label for an Ad Hoc reviewer**. Note that the field defaults to “Yes”.

In the **If this is not an Ad Hoc Review please add the Rank ( e.g., 1, 2, 3)** field, enter a single digit from zero (0) through three (3). “0” indicates an Ad Hoc reviewer. “1” indicates a Primary Reviewer. “2” indicates a Secondary Reviewer. “3” indicates any other review level. “0” indicates Ad Hoc.

*Note that if no entry is made in the **If this is not an Ad Hoc Review please add the Rank ( e.g., 1, 2, 3)** field a default value of “0” will be stored by the system, indicating this is an Ad Hoc Reviewer role.*

Click the **Save Reviewer Rank** button to close the add panel. The record is added on the **Setup Reviewer Rank List** page.

	Edit	Reviewer Rank
<input type="checkbox"/>		Full Board Primary Reviewer
<input type="checkbox"/>		Academic Review

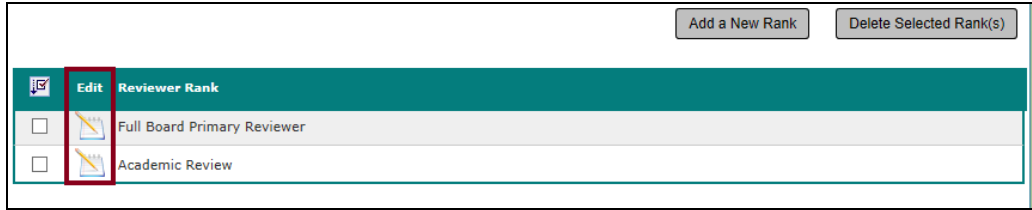
Add a New Rank    Delete Selected Rank(s)

## Edit Reviewer Rank

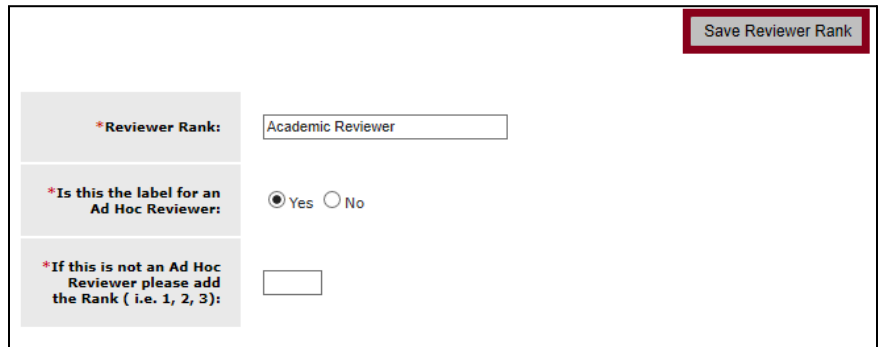
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.

- Predefined Stipulations
- Review Outcome/Outcome Configuration List
- Reviewer Rank Configuration List ←
- Setup Review Board Stipulation Actions
- Setup Training Courses
- Business Associate List
- Sponsor Type

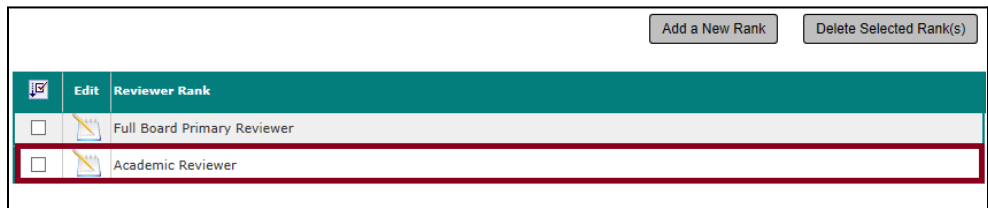
The **Setup Reviewer Rank List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an edit panel. Make desired changes and click the **Save Reviewer Rank** button.

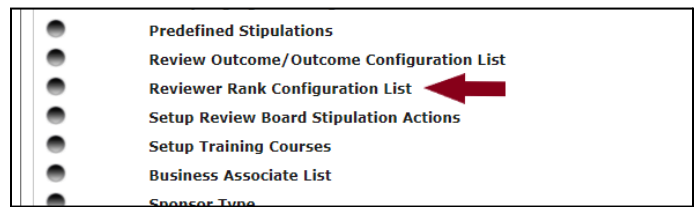


The edit panel is closed, and the record is revised on the **Setup Reviewer Rank List** page.

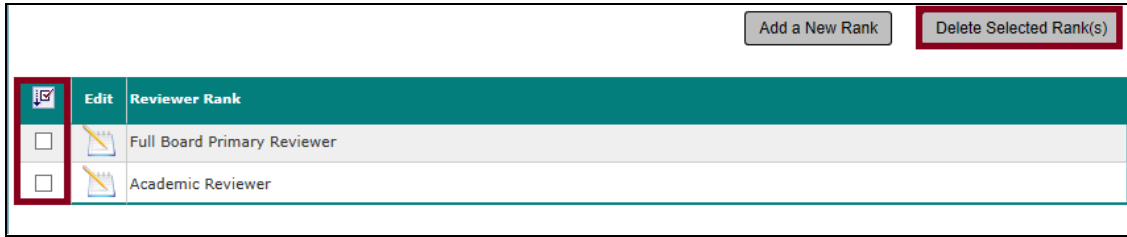


## Delete Reviewer Rank

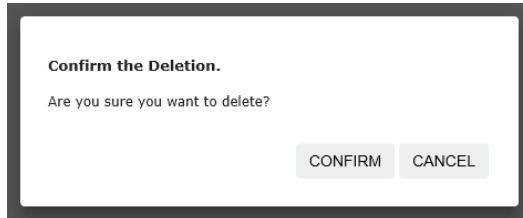
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.



The **Setup Reviewer Rank List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Rank(s)** button.



A confirmation popup window displays.

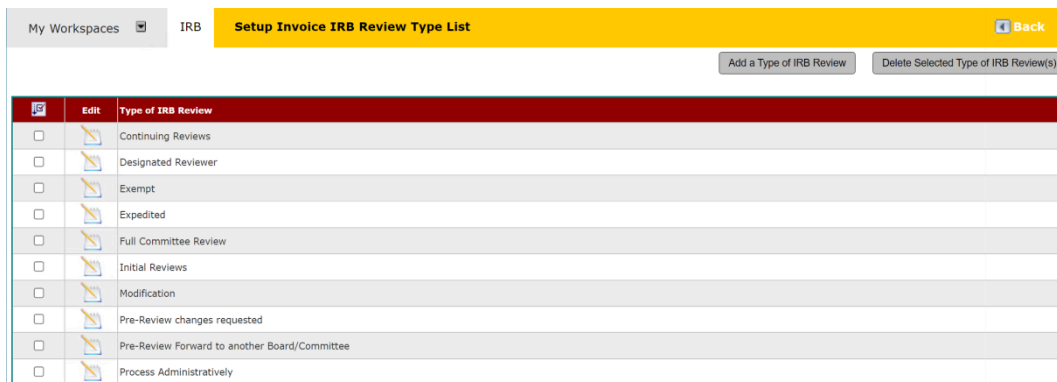


Click **CANCEL** to close the popup without deleting the record.

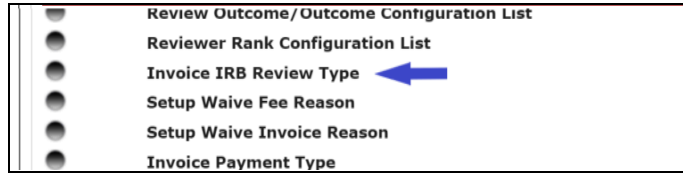
Click **CONFIRM** to complete deletion of the record. The popup closes and the record is deleted from the **Setup Reviewer Rank List** page.

## Invoice IRB Review Type

The iRIS™ system provides invoicing and accounting tools for use during processing of fee-based submissions. Categories for fee based review types are configured via the **Setup Invoice IRB Review Type List** page, shown below.

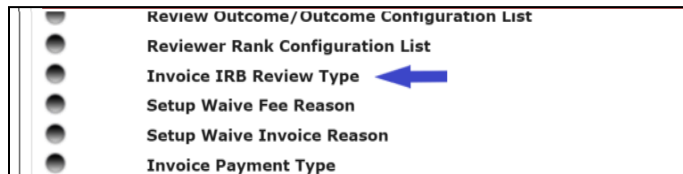


The configuration list is accessed via the IRB Assistant > Review Board Administration > List Maintenance Setup tab > **Invoice IRB Review Type** link.

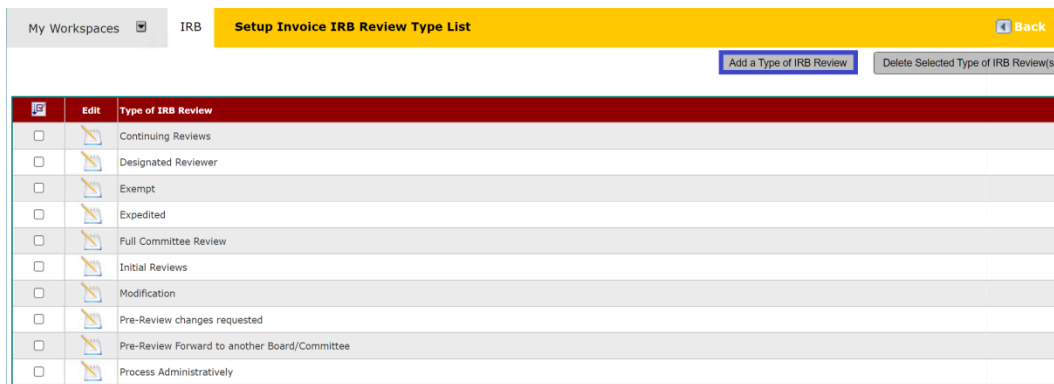


## Add Review Type

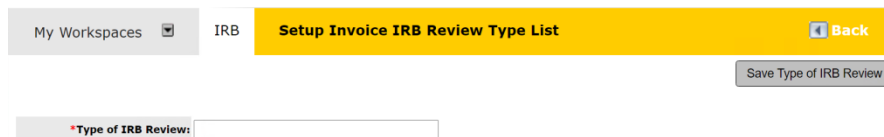
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Invoice IRB Review Type** link.



As shown below, the **Setup Invoice IRB Review Type List** page opens.



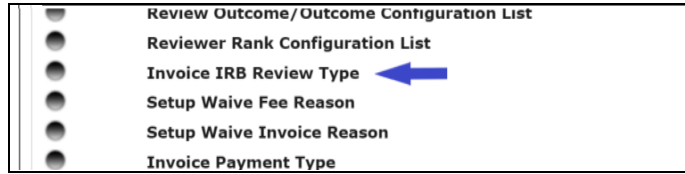
Click the **Add a Type of IRB Review** button (blue box in screenshot above). An add form opens, as shown below.



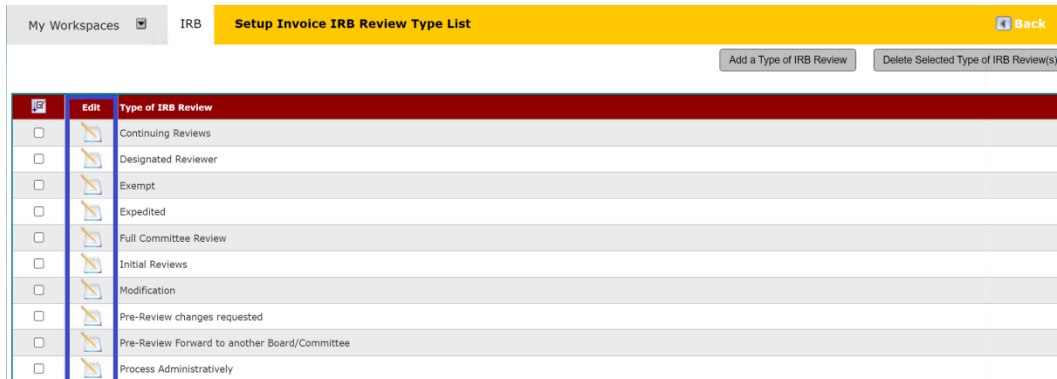
Enter the desired text for the new **Type of IRB Review** and click the **Save** button. The add form closes and the new **Review Type** is added to the list on the **Setup Invoice IRB Review Type List** page.

## Edit Review Type

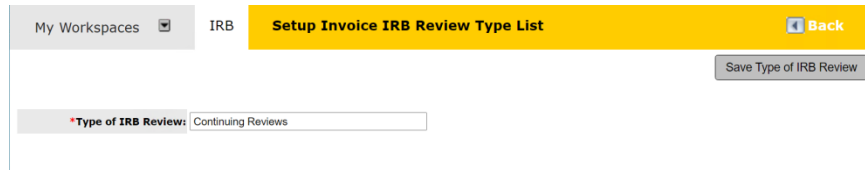
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Invoice IRB Review Type** link.



As shown below, the **Setup Invoice IRB Review Type List** page opens.



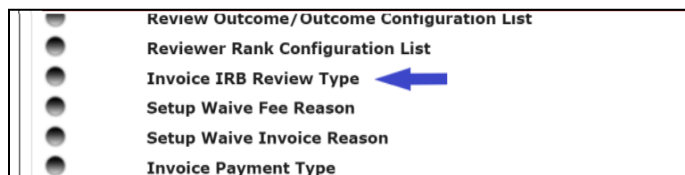
Click the applicable icon in the **Edit** column (blue box in screenshot above). The selected record is opened in an edit form, as shown below.



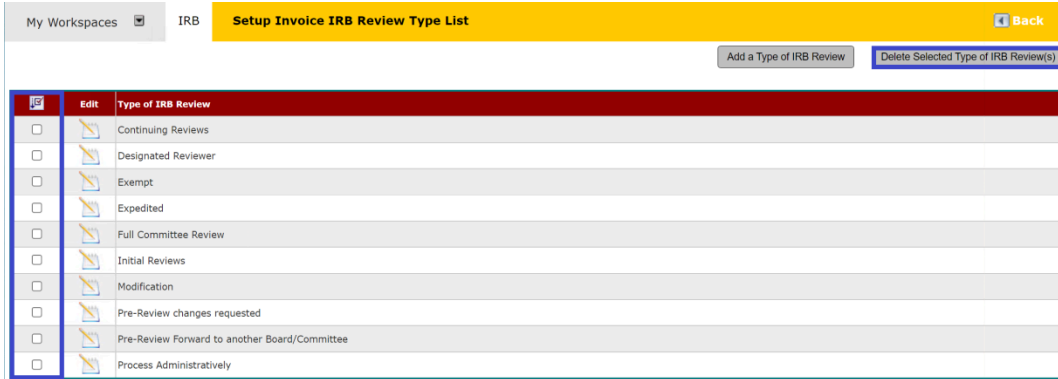
Revise the **Type of IRB Review** text as desired and click the **Save** button. The edit form closes and the **Review Type** is revised in the list on the **Setup Invoice IRB Review Type List** page

## Delete Review Type

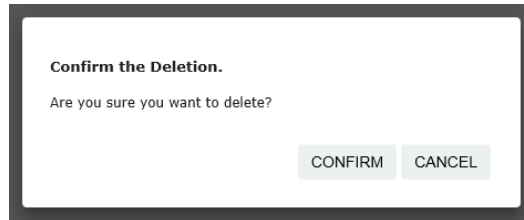
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Invoice IRB Review Type** link.



As shown below, the **Setup Invoice IRB Review Type List** page opens.



Click to select the checkbox(es) of the type(s) to be deleted and click the **Delete Selected Type of IRB Review(s)** button (blue boxes in screenshot above). A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The popup closes and the record is deleted from the **Setup Invoice IRB Review Type List** page.

## Waive Fee Option

Beginning with iRIS™ version 12.01, it is possible to waive invoice fees and maintain a configurable list of reasons for doing so. This functionality for situations where it is useful or necessary to generate an invoice for recordkeeping purposes, but no fee is to be charged. This feature is property based.

As shown below, six new properties have been added within the **Fee tracking** category under IRB Assistant > Review Board Administration > Board Configuration (red boxes in screenshot below).

My Workspaces ▾ IRB Board **Setup Board Properties** [Back](#)

**RB Properties List** [Download Properties Script](#) [Save After Edit](#)

Property Name	Property Value
rb.show_rb_highest_review_level_on_invoice	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_rb_invoicing	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_rb_invoicing_journal_fields_on_invoice	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_rb_invoicing_review_level_on_invoice	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_rb_invoicing_review_type	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_rb_invoicing_review_type_on_invoice	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_rb_invoicing_waive_fee	<input checked="" type="radio"/> Yes <input type="radio"/> No

- Board Setup
- Submission Review Properties
- Document Processing
- Study Summary Info
- Consent Processing
- Reviewers
- Meeting Settings
- Security
- **Fee tracking**
- Multi-site Setup
- Recommendations and Stipulations
- Study Board Properties
- Amendments
- Submission Prereview
- Letter
- Submissions
- Notification
- Internal Routing
- Training

The new properties are:

rb.show\_rb\_highest\_review\_level\_on\_invoice

rb.use\_rb\_invoicing\_journal\_fields\_on\_invoice

rb.use\_rb\_invoicing\_review\_level\_on\_invoice

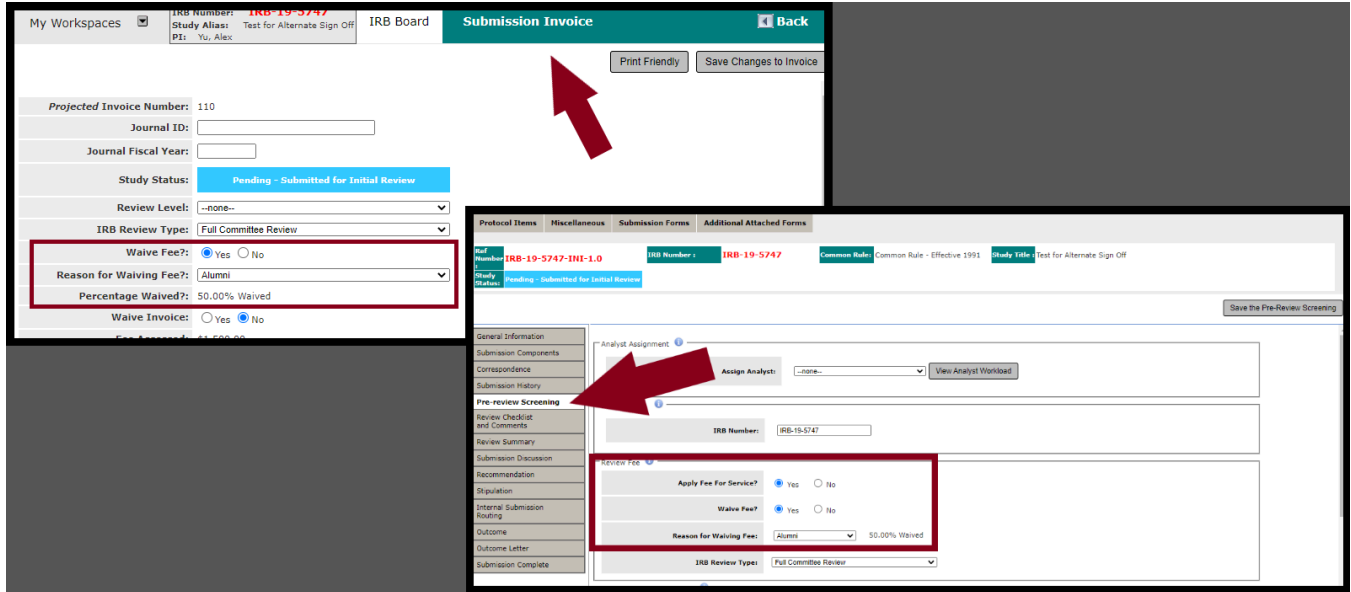
rb.use\_rb\_invoicing\_review\_type

rb.use\_rb\_invoicing\_review\_type\_on\_invoice

rb.use\_rb\_invoicing\_waive\_fee

By default, “No” is selected for all of these properties. Invoicing must be enabled within the module by selecting “Yes” for the rb.use\_rb\_invoicing property in order for the new fields to function, as that property turns the entire invoicing feature off and on.

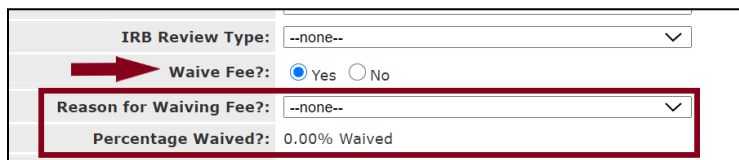
As demonstrated in the screenshot below, setting ALL SIX (6) properties to “Yes” adds a **Waive Fee** Y/N field, **Reason for Waiving Fee** field and auto-populating **Percentage Waived** field on the **Submission Invoice** page, and entries made there carry through to the submissions **Pre-review Screening** tab, below the **Apply Fee for Service** field.



Note that the **Waive Fee** and **Reason for Waiving Fee** fields remain active on the **Pre-review Screening** tab and can be updated there.

With the properties enabled, new fields populate on the **Submission Invoice** page as follows:

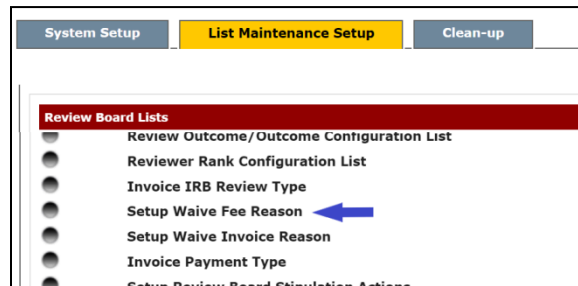
**Waive Fee?** — select “Yes” to waive the fee; this selection populates **Reason for Waiving Fee?** and **Percentage Waived** fields, as shown below



**Reason for Waiving Fee?** — click in the field to open a drop down pick list of reasons; click the desired item to select it, automatically populating the associated **Percentage Waived?** field

### Setup Waive Fee Reason

The preconfigured list of acceptable reasons for waiving fees is maintained via the **Setup Waive Fee Reason List** page. To access the page, navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Fee Reason** link.



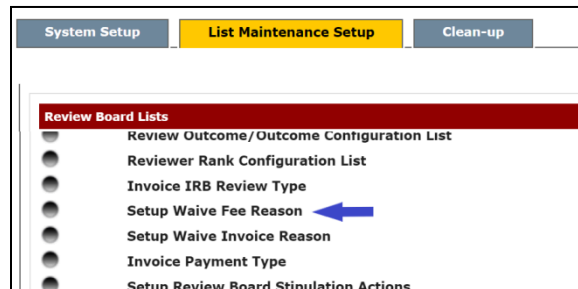
Click the link to open the **Setup Waive Fee Reason List** page, shown below.

	Edit	Waive Fee Reason	% Waived
<input type="checkbox"/>		Alumni	50.00%
<input type="checkbox"/>		Complete Fee Waiver	99.99%
<input type="checkbox"/>		Fee Waived	12.00%
<input type="checkbox"/>		Fee Waived Reason 2	42.00%
<input type="checkbox"/>		Veteran	65.00%

Previously configured **Wave Fee Reasons** are listed in a table. Buttons and controls are provided to add, edit or delete **Waive Fee Reasons**.

### Add Waive Fee Reason

Navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Fee Reason** link.



Click the link to open the **Setup Waive Fee Reason List** page, shown below.

	Edit	Waive Fee Reason	% Waived
<input type="checkbox"/>		Alumni	50.00%
<input type="checkbox"/>		Complete Fee Waiver	99.99%
<input type="checkbox"/>		Fee Waived	12.00%
<input type="checkbox"/>		Fee Waived Reason 2	42.00%
<input type="checkbox"/>		Veteran	65.00%

Click the **Add a Waive Fee Reason** button (blue box in screenshot above). An add form opens, as shown below.

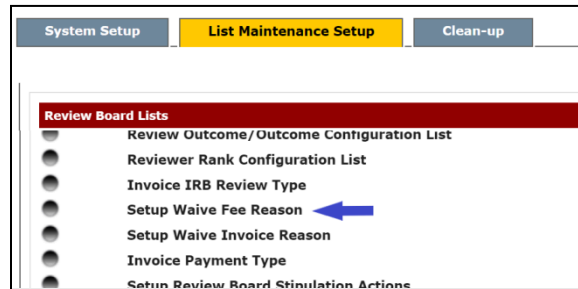
\*Waive Fee Reason:

\*Percent to Waive:  %

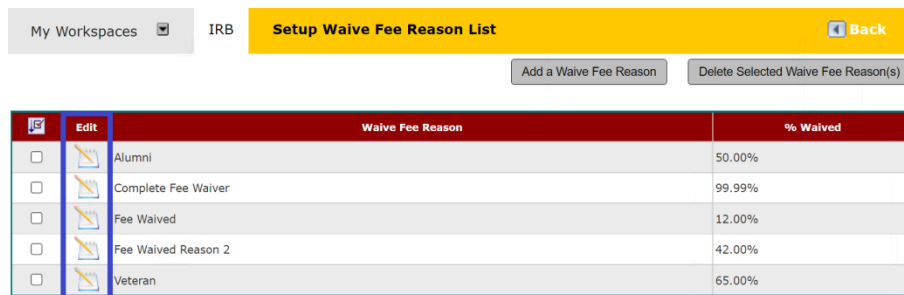
Enter the desired text for the new **Waive Fee Reason** and the desired **Percent to Waive**, then click the **Save Waive Fee Reason** button. The add form closes and the new **Waive Fee Reason** is added to the **Waive Fee Reason** list.

### Edit Waive Fee Reason

Navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Fee Reason** link.



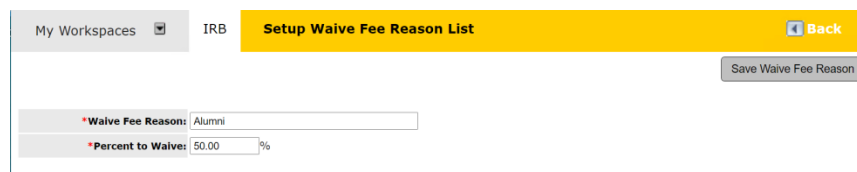
Click the link to open the **Setup Waive Fee Reason List** page, shown below.



The screenshot shows the 'Setup Waive Fee Reason List' page. At the top, there is a navigation bar with 'My Workspaces' and 'IRB'. The page title is 'Setup Waive Fee Reason List' with a 'Back' button. Below the title are two buttons: 'Add a Waive Fee Reason' and 'Delete Selected Waive Fee Reason(s)'. The main content is a table with the following data:

	Waive Fee Reason	% Waived
<input type="checkbox"/>	Alumni	50.00%
<input type="checkbox"/>	Complete Fee Waiver	99.99%
<input type="checkbox"/>	Fee Waived	12.00%
<input type="checkbox"/>	Fee Waived Reason 2	42.00%
<input type="checkbox"/>	Veteran	65.00%

Click the applicable icon in the **Edit** column (blue box in screenshot above) to open the corresponding **Waive Fee Reason** record for editing. The record is opened in an edit panel, as shown below.

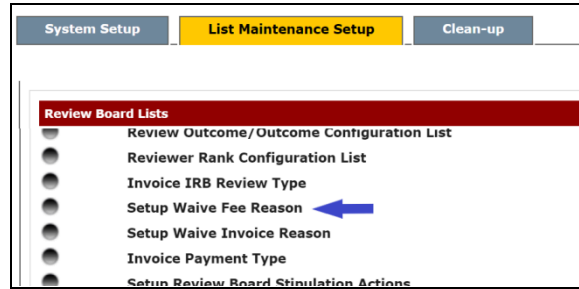


The screenshot shows the edit panel for the 'Alumni' Waive Fee Reason record. At the top, there is a navigation bar with 'My Workspaces' and 'IRB'. The page title is 'Setup Waive Fee Reason List' with a 'Back' button. Below the title is a 'Save Waive Fee Reason' button. The main content is a form with two fields: '\*Waive Fee Reason:' with the value 'Alumni' and '\*Percent to Waive:' with the value '50.00%' and a '%' sign.

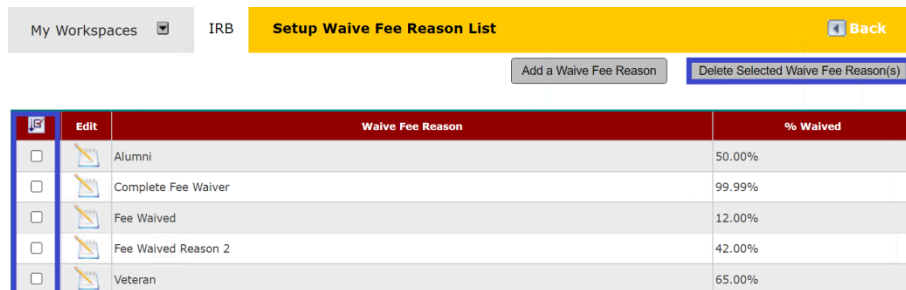
Make desired changes to the text for **Waive Fee Reason** and **Percent to Waive**, then click the **Save** button. The edit form closes and the **Waive Fee Reason** is revised in the **Waive Fee Reason** list.

### Delete Waive Fee Reason

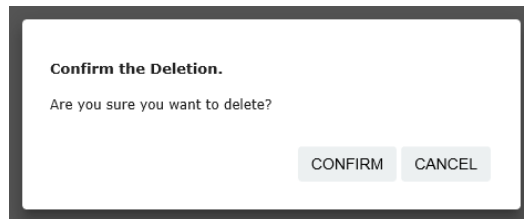
Navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Fee Reason** link.



Click the link to open the **Setup Waive Fee Reason List** page, shown below.



Click to select the applicable checkbox(es) in the far left column (blue box in screenshot above) for the **Waive Fee Reason** record(s) to be deleted and click the **Delete Selected Waive Fee Reason(s)** button. A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

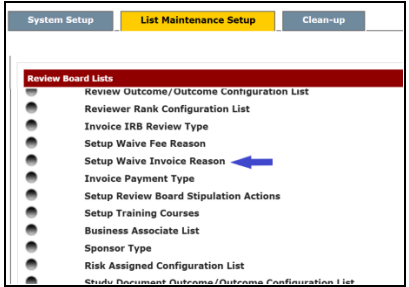
Click **CONFIRM** to complete deletion of the record. The popup closes and the record is deleted from the **Setup Waive Fee Reason List** page.

## Waive Invoice Option

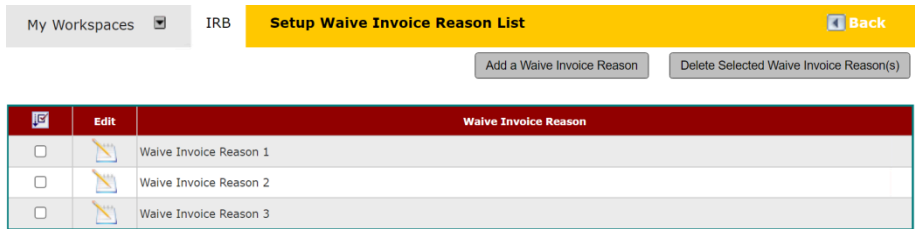
Beginning with iRIS™ version 12.01, it is possible to waive the issuance of an invoice while still capturing fee data, and maintain a configurable list of reasons for waiving the issuance of the invoice.

## Setup Waive Invoice Reason

The preconfigured list of acceptable reasons for waiving invoices is maintained via the **Setup Waive Invoice Reason List** page. To access the page, navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Invoice Reason** link.



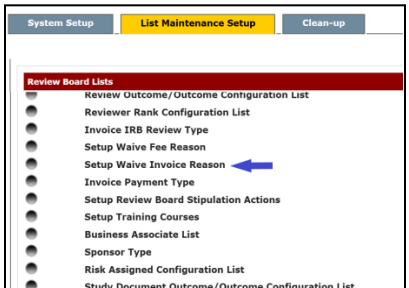
Click the link to open the **Setup Waive Invoice Reason List** page, shown below.



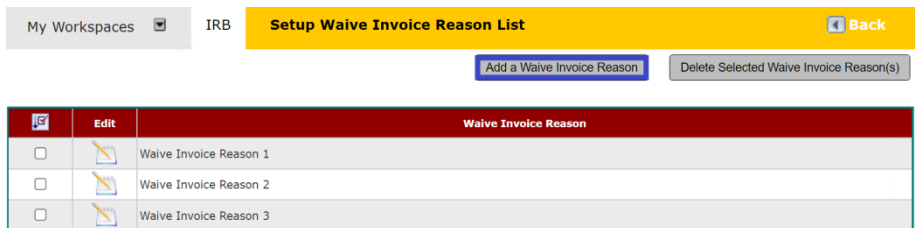
Previously configured **Wave Invoice Reasons** are listed in a table. Buttons and controls are provided to add, edit or delete **Waive Invoice Reasons**.

**Add Waive Invoice Reason**

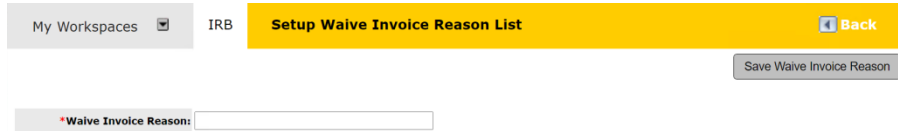
Navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Invoice Reason** link.



Click the link to open the **Setup Waive Invoice Reason List** page, shown below.



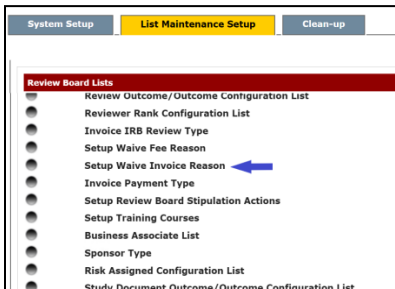
Click the **Add a Waive Invoice Reason** button (blue box in screenshot above). An add form opens, as shown below.



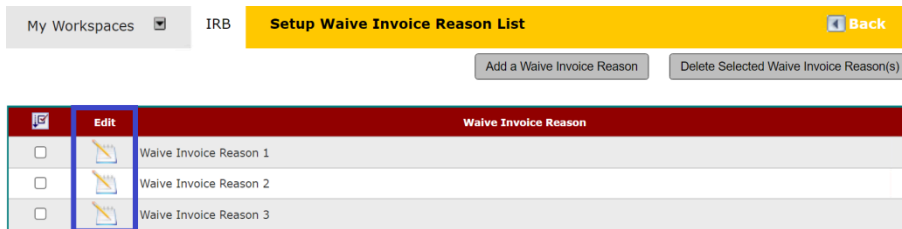
Enter the desired text for the new **Waive Invoice Reason** and click the **Save Waive Invoice Reason** button. The add form closes and the new **Waive Invoice Reason** is added to the **Waive Invoice Reason** list.

### Edit Waive Invoice Reason

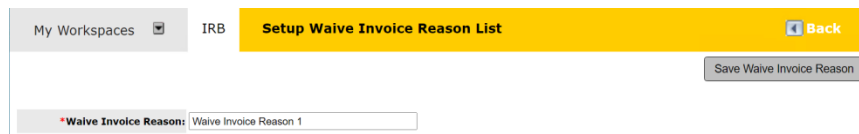
Navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Invoice Reason** link.



Click the link to open the **Setup Waive Invoice Reason List** page, shown below.



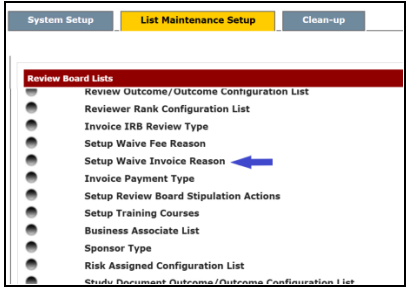
Click the applicable icon in the **Edit** column (blue box in screenshot above) to open the corresponding **Waive Invoice Reason** record for editing. The record is opened in an edit panel, as shown below.



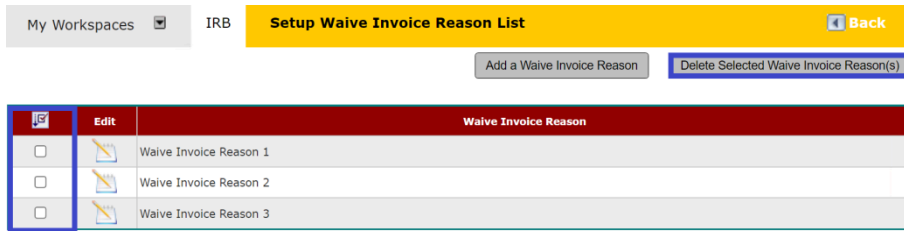
Make desired changes to the text for **Waive Invoice Reason** and click the **Save** button. The edit form closes and the **Waive Invoice Reason** is revised in the **Waive Invoice Reason** list.

### Delete Waive Invoice Reason

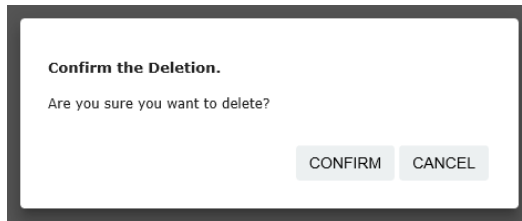
Navigate to Review Board Administration > List Maintenance Setup > **Setup Waive Invoice Reason** link.



Click the link to open the **Setup Waive Invoice Reason List** page, shown below.



Click to select the applicable checkbox(es) in the far left column (blue box in screenshot above) for the **Waive Invoice Reason** record(s) to be deleted and click the **Delete Selected Waive Invoice Reason(s)** button. A confirmation popup window displays.

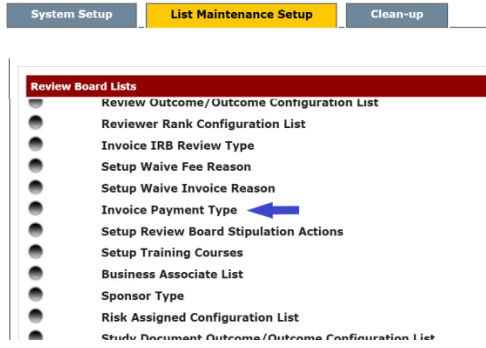


Click **CANCEL** to close the popup without deleting the record.

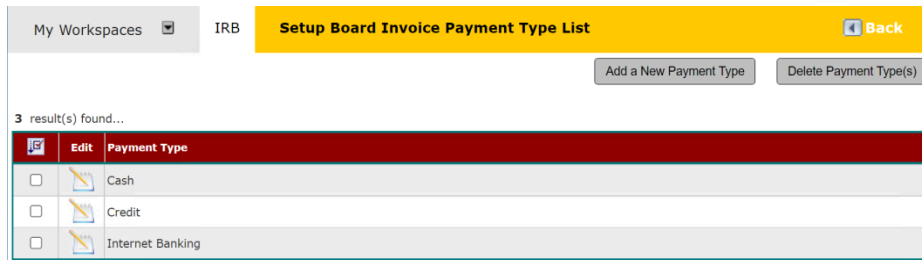
Click **CONFIRM** to complete deletion of the record. The popup closes and the record is deleted from the **Setup Waive Invoice Reason List** page.

## Invoice Payment Type

A predefined list of invoice payment methods (e.g., cash, credit card, etc.) is maintained via the invoice payment type list, which is maintained via the **Setup Board Invoice Payment Type List** page. To access the page, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Invoice Payment Type** link.



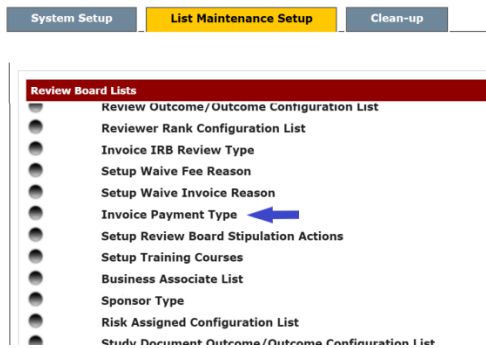
As shown below, the **Setup Board Invoice Payment Type List** page opens.



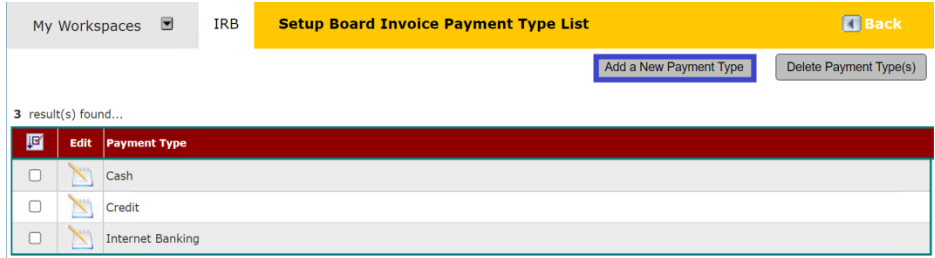
Previously configured **Payment Types** are listed in a table. Buttons and controls are provided to add, edit or delete **Payment Types**.

### Add Invoice Payment Type

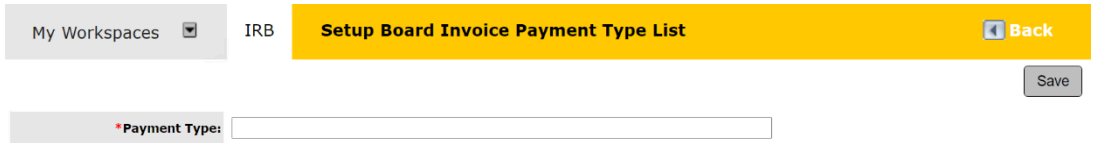
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Invoice Payment Type** link.



As shown below, the **Setup Board Invoice Payment Type List** page opens.



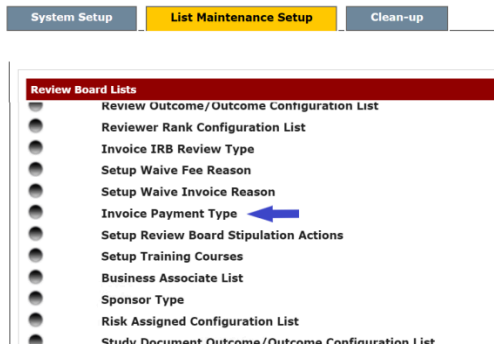
Click the **Add a New Payment Type** button (blue box in screenshot above). An add form opens, as shown below.



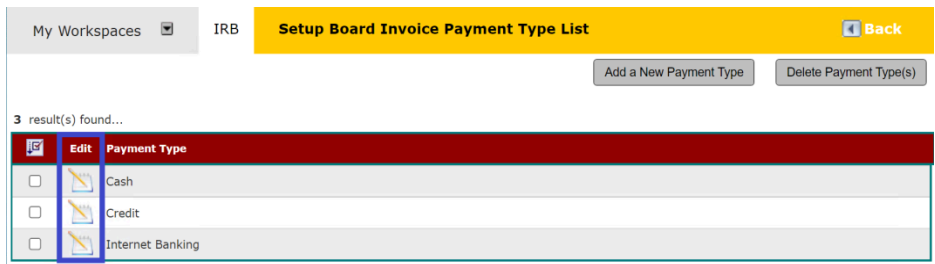
Enter the desired text for the new **Payment Type** and click the **Save** button. The add form closes and the new **Payment Type** is added to the invoice **Payment Type** list.

## Edit Invoice Payment Type

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Invoice Payment Type** link.



As shown below, the **Setup Board Invoice Payment Type List** page opens.



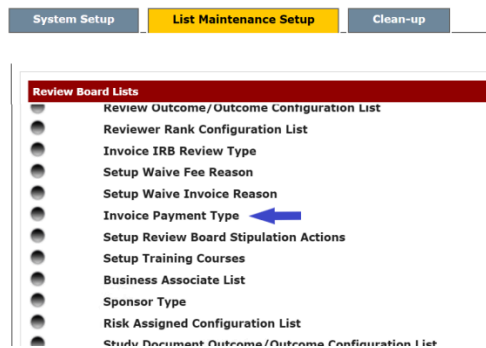
Click the applicable icon in the **Edit** column (blue box in screenshot above) to open the corresponding **Payment Type** record for editing. The record is opened in an edit panel, as shown below.

My Workspaces ▾ IRB **Setup Board Invoice Payment Type List** [Back](#)

Make desired changes to the **Payment Type** text and click the **Save** button. The edit form closes and the **Payment Type** is revised in the invoice **Payment Type** list.

### Delete Invoice Payment Type

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Invoice Payment Type** link.



As shown below, the **Setup Board Invoice Payment Type List** page opens.

My Workspaces ▾ IRB **Setup Board Invoice Payment Type List** [Back](#)

3 result(s) found...

<input type="checkbox"/>	Edit	Payment Type
<input type="checkbox"/>		Cash
<input type="checkbox"/>		Credit
<input type="checkbox"/>		Internet Banking

Click to select the applicable checkbox(es) in the far left column (blue box in screenshot above) for the **Payment Type** record(s) to be deleted. A confirmation popup window displays.

**Confirm the Deletion.**

Are you sure you want to delete?

Click **CANCEL** to close the popup without deleting the record and return to the **Setup Protocol Document Outcome** page.

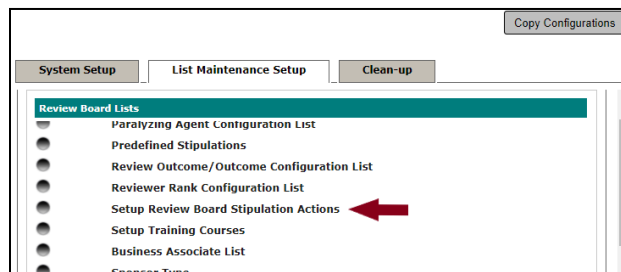
Click **CONFIRM** to complete deletion of the record. The **Payment Type** is deleted from the **Setup Board Invoice Payment Type List** page.

## Setup Review Board Stipulation Actions

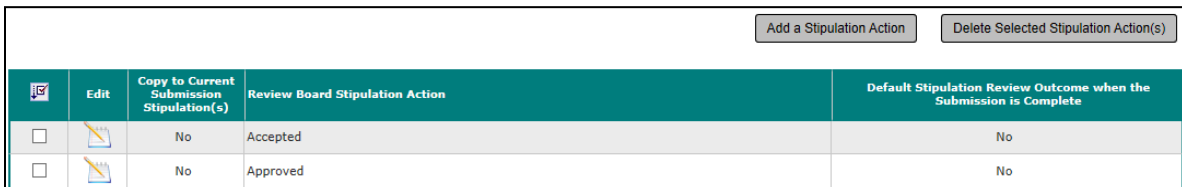
The Review Board Stipulation Actions List is where a list of boilerplate review board stipulation actions approved for use in studies is maintained in the iRIS™ system.

These actions are applied to stipulations when a study submits its response to the review board. Review board stipulation actions determine if the incoming stipulation can be closed as complete or must be retained as an outstanding item to the study.

To view the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.



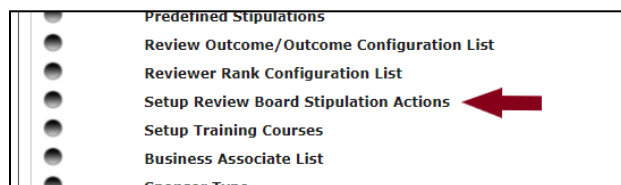
The **Setup Stipulation Review Board Actions** page is opened.



<input type="checkbox"/>	Edit	Copy to Current Submission Stipulation(s)	Review Board Stipulation Action	Default Stipulation Review Outcome when the Submission is Complete
<input type="checkbox"/>		No	Accepted	No
<input type="checkbox"/>		No	Approved	No

## Add Review Board Stipulation

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.



The **Setup Stipulation Review Board Actions** page is opened. Click the **Add a Stipulation Action** button.

		<a href="#">Add a Stipulation Action</a>		<a href="#">Delete Selected Stipulation Action(s)</a>	
	Edit	Copy to Current Submission Stipulation(s)	Review Board Stipulation Action	Default Stipulation Review Outcome when the Submission is Complete	
<input type="checkbox"/>		No	Accepted	No	
<input type="checkbox"/>		No	Approved	No	

An add panel is opened for creation of the new record.

[Save Stipulation Action](#)

**\* Action:**

**\* Automatically Copy Stipulation from Previous Submission to Current Submission :**  Yes  No

**\* Default Stipulation Review Outcome when the Submission is Complete:**

The **Automatically Copy Stipulation from Previous Submission to Current Submission** setting controls whether the stipulation is to be closed as completed or copied to the current submission and remain as an outstanding item to the study. “No” indicates the stipulation is to be closed. “Yes” indicates the stipulation will remain as an outstanding item to the study.

The **Default Stipulation Review Outcome when the Submission is Complete** selection dictates whether a closed status is to be automatically assigned to the stipulation. Click the **Save Stipulation Action** button to add the record to the list.

Complete the form as desired and click the **Save Stipulation Action** button.

[Save Stipulation Action](#)

**\* Action:**

**\* Automatically Copy Stipulation from Previous Submission to Current Submission :**  Yes  No

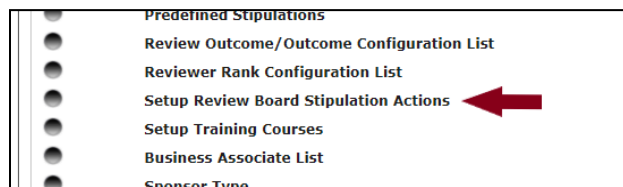
**\* Default Stipulation Review Outcome when the Submission is Complete:**

The record is added to the **Setup Stipulation Review Board Actions** list page.

		Add a Stipulation Action		Delete Selected Stipulation Action(s)	
<input checked="" type="checkbox"/>	Edit	Copy to Current Submission Stipulation(s)	Review Board Stipulation Action	Default Stipulation Review Outcome when the Submission is Complete	
<input type="checkbox"/>		No	Accepted	No	
<input type="checkbox"/>		No	Approved	No	
<input type="checkbox"/>		Yes	Rejected	No	

### Edit Review Board Stipulation

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.



The **Setup Stipulation Review Board Actions** page is opened. Click the icon in the Edit column for the applicable record.

		Add a Stipulation Action		Delete Selected Stipulation Action(s)	
<input checked="" type="checkbox"/>	Edit	Copy to Current Submission Stipulation(s)	Review Board Stipulation Action	Default Stipulation Review Outcome when the Submission is Complete	
<input type="checkbox"/>		No	Accepted	No	
<input type="checkbox"/>		No	Approved	No	
<input type="checkbox"/>		No	Rejected	No	

The record is opened in an edit panel. Make desired changes and click the **Save Stipulation Action** button.

**\* Action:**

**\*Automatically Copy Stipulation from Previous Submission to Current Submission :**

**\* Default Stipulation Review Outcome when the Submission is Complete:**

Rejected

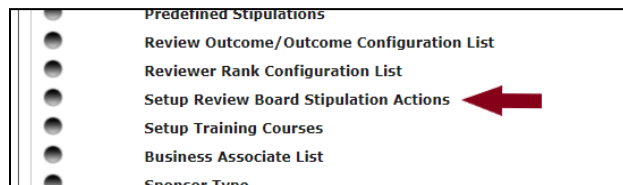
Yes  No

The edit panel is closed, and the record is revised on the **Setup Stipulation Review Board Actions** list page.

				Add a Stipulation Action	Delete Selected Stipulation Action(s)
<input checked="" type="checkbox"/>	Edit	Copy to Current Submission Stipulation(s)	Review Board Stipulation Action	Default Stipulation Review Outcome when the Submission is Complete	
<input type="checkbox"/>		No	Accepted	No	
<input type="checkbox"/>		No	Approved	No	
<input type="checkbox"/>		Yes	Rejected	No	

## Delete Review Board Stipulation

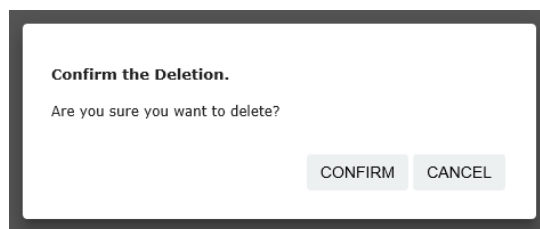
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.



The **Setup Stipulation Review Board Actions** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Stipulation Action(s)** button.

				Add a Stipulation Action	Delete Selected Stipulation Action(s)
<input checked="" type="checkbox"/>	Edit	Copy to Current Submission Stipulation(s)	Review Board Stipulation Action	Default Stipulation Review Outcome when the Submission is Complete	
<input type="checkbox"/>		No	Accepted	No	
<input type="checkbox"/>		No	Approved	No	
<input type="checkbox"/>		Yes	Rejected	No	

A confirmation popup window displays.

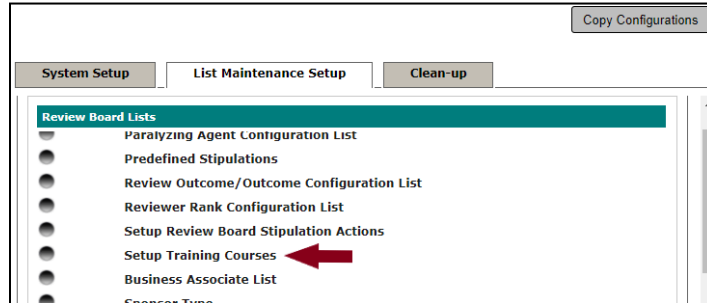


Click **CANCEL** to close the popup without deleting the record and return to the **Setup Stipulation Review Board Actions** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Stipulation Review Board Actions** page. The record is deleted from the **Setup Stipulation Review Board Actions** page.

## Setup Training Courses

Direct access to the Define Training Courses area under iRIS™ System Administration > List Configuration and Maintenance > System Setup tab > User Training Setup section is provided for the review board under IRB Assistant > Review Board Administration > List Maintenance Setup tab > Setup Training Courses link.



See the List Configuration and Maintenance section of the System Administration – User Training Manual for more information about configuring and tracking iRIS™ user training.

## Business Associate List

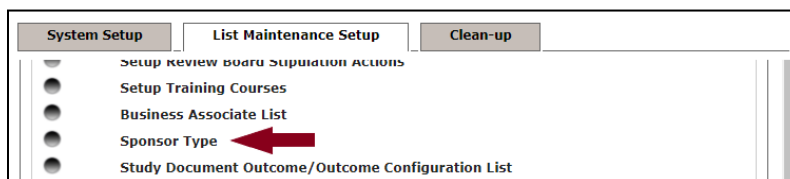
The Business Associate List link is used to access system functions related to business associates. In this context, a business associate is an institution or business which interacts with the institution where iRIS™ is in use.

Within the iRIS™ system, business associate entities can be added as a study sponsor, vendor or subrecipient, or as a third party in a conflict of interest.

For more information about business associate list management activities, see the Business Associate List manual.

## Sponsor Type

The Sponsor Type configuration list is where a list of predefined sponsor types is maintained in the iRIS™ system. To view the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Sponsor Type** link.



The **Setup Sponsor Type** page is opened.

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		01 - Federal	1	Yes	Federal Government: Departments, agencies, etc. of the United States government.
		02 - State	2	Yes	State Government: Departments, agencies, etc. of the State of California
		03 - Other Government	3	Yes	Other Government Agency: Other governmental agencies, including: cities; counties; other states; foreign governments or governmental agencies; multi-national organizations such as the United Nations; or, quasi-governmental agencies or special districts, such as a water or pest control district.
		04 - Business/Profit Entity	4	Yes	Business/Profit Entity: Business or other entity engaged in activities for profit.
		05 - Non-profit	5	Yes	Non-Profit, Business Related: Non-profit organization sponsored by one or more business or other entities engaged in activities for profit, including: corporate foundations, industry or trade associations; and professional, union, or lobbying organizations.
		06 - Foundation/Charitable Trust	6	Yes	Foundation/Charitable Trust: Non-profit foundations or charitable trusts, as defined in The Foundation Directory; excluding corporate foundations; and, including funds or endowments designated by the Internal Revenue Service as private grant-making foundations, community foundations, family foundations, and charitable trusts.
		07 - Higher Education	7	Yes	Higher Education: Higher education institution or association such as: Harvard Institution/Association University, University of Michigan, or the American Association of Colleges of Pharmacy.
		08 - Campus Organization	8	Yes	Campus-Related Organization: Campus-related organization, including student groups, University support groups, alumni associations, etc.
		09 - Individual	9	Yes	Individual: Individuals, excluding incorporated professionals who should be coded 'Business/Profit Entity'.
		10 - Marketing Orders	10	Yes	Marketing Orders: Regulated Agricultural Marketing Order Boards
		11 - Unfunded	11	No	
		12 - Departmental	12	No	Carried out with either actual funding from Departmental funding source or by faculty and staff who receive salary support from Departmental funding.
		99 - Unassigned	99	Yes	Unassigned: Sponsor not yet assigned to one of the above categories

### Sponsor Type Implementation: Application Side

The sponsor type list is employed when a sponsor is added to the study application via the **Add a New Sponsor to the Study** button. As shown below, any sponsor listed in the table beneath the add button includes the Sponsor Type designation selected when the sponsor is added to the application.

+ Add a New Sponsor to the Study									
Delete	Edit	View Details	Sponsor Name	Sponsor Type	Funding Through	Contract Type:	Project Number	Award Number	Modified
No Sponsor has been added to this Study									

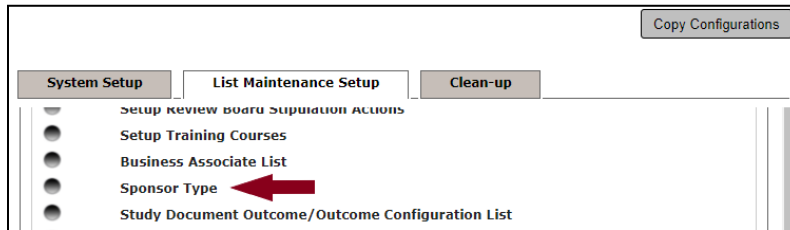
### Sponsor Type Implementation: Board Side

The sponsor type list is employed in the **System Setup of Business Associate List** page, as shown below.

When “Sponsor” is selected from among the **Associate Group** options (large red arrow in screenshot above), new fields populate for selection of the sponsor type (small red arrow and red box in screenshot above) and entity details.

## Add Sponsor Type

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Sponsor Type** link.



The **Setup Sponsor Type** page is opened. Click the **Add a New Category** button.

13 result(s) found... Add a New Category 1 - 13

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		01 - Federal	1	Yes	Federal Government: Departments, agencies, etc. of the United States government.
		02 - State	2	Yes	State Government: Departments, agencies, etc. of the State of California
		03 - Other Government	3	Yes	Other Government Agency: Other governmental agencies, including: cities; counties; other states; foreign governments or governmental agencies; multi-national organizations such as the United Nations; or, quasi-governmental agencies or special districts, such as a water or pest control district.
		04 - Business/Profit Entity	4	Yes	Business/Profit Entity: Business or other entity engaged in activities for profit.
		05 - Non-profit	5	Yes	Non-Profit, Business Related: Non-profit organization sponsored by one or more business or other entities engaged in activities for profit, including: corporate foundations, industry or trade associations; and professional, union, or lobbying organizations.
		06 - Foundation/Charitable Trust	6	Yes	Foundation/Charitable Trust: Non-profit foundations or charitable trusts, as defined in The Foundation Directory; excluding corporate foundations; and, including funds or endowments designated by the Internal

An add panel is opened for creation of the new record.

The form contains the following fields:
 

- \*Sponsor Type:** A text input field.
- \*Sort Order Number:** A text input field with the value '1'.
- \*Include Sponsors of this group in Disclosure Search:** Radio buttons for 'Yes' (selected) and 'No'.
- Description:** A large text area for entering the sponsor's description.

 A 'Save Category' button is located in the top right corner.

Enter a **Sponsor Type** name. At some institutions a numeric code is included in the name, as shown in the previous screenshot. The name should be distinct from any pre-existing items in the configuration list.

Enter the desired **Sort Order Number**. This number specifies the order in which sponsors appear in the configuration list and dropdown picklist of sponsors.

*Note: If a number that is already in use is selected, when this record is saved its **Sort Order Number** overrides any pre-existing item with the same sort order. The overridden item and all items that follow it in the list are incremented by one (1) and moved down one (1) position in the configuration list.*

Select “Yes” or “No” for **Include Sponsors of this group in Disclosure Search** field.

Enter a **Description** of the sponsor to assist system users in distinguishing it from other sponsors in the list.

An example of the filled add panel is shown below. Click the **Save Category** button.

Save Category

\* Sponsor Type:

\* Sort Order Number:

\* Include Sponsors of this group in Disclosure Search:  Yes  No

Description:

The record is added on the **Setup Sponsor Type** page.

14 result(s) found...						Add a New Category
1 - 14						
Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description	
		01 - Federal	1	Yes	Federal Government: Departments, agencies, etc. of the United States government.	
		02 - State	2	Yes	State Government: Departments, agencies, etc. of the State of California	
		03 - Other Government	3	Yes	Other Government Agency: Other governmental agencies, including: cities; counties; other states; foreign governments or governmental agencies; multi-national organizations such as the United Nations; or, quasi-governmental agencies or special districts, such as a water or pest control district.	
		04 - Business/Profit Entity	4	Yes	Business/Profit Entity: Business or other entity engaged in activities for profit.	
		05 - Non-profit	5	Yes	Non-Profit, Business Related: Non-profit organization sponsored by one or more business or other entities engaged in activities for profit, including: corporate foundations, industry or trade associations; and professional, union, or lobbying organizations.	
		06 - Foundation/Charitable Trust	6	Yes	Foundation/Charitable Trust: Non-profit foundations or charitable trusts, as defined in The Foundation Directory; excluding corporate foundations; and, including funds or endowments designated by the Internal Revenue Service as private grant-making foundations, community foundations, family foundations, and charitable trusts.	
		07 - Higher Education	7	Yes	Higher Education: Higher education institution or association such as: Harvard Institution/Association University, University of Michigan, or the American Association of Colleges of Pharmacy.	
		08 - Campus Organization	8	Yes	Campus-Related Organization: Campus-related organization, including student groups, University support groups, alumni associations, etc.	
		09 - Individual	9	Yes	Individual: Individuals, excluding incorporated professionals who should be coded 'Business/Profit Entity'.	
		10 - Marketing Orders	10	Yes	Marketing Orders: Regulated Agricultural Marketing Order Boards	
		11 - Unfunded	11	No		
		12 - Departmental	12	No	Carried out with either actual funding from Departmental funding source or by faculty and staff who receive salary support from Departmental funding.	
		13 - Professional Association	13	Yes	Professional Association: medical / scientific professional association such as the American Medical Association	
		99 - Unassigned	99	Yes	Unassigned: Sponsor not yet assigned to one of the above categories	

## Edit Sponsor Type

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Sponsor Type** link.

Copy Configurations

System Setup
List Maintenance Setup
Clean-up

Setup Review Board Supervision Actions

Setup Training Courses

Business Associate List

Sponsor Type

Study Document Outcome/Outcome Configuration List

The **Setup Sponsor Type** page is opened. Click the icon in the **Edit** column for the applicable record.

14 result(s) found... Add a New Category

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		01 - Federal	1	Yes	Federal Government: Departments, agencies, etc. of the United States government.
		02 - State	2	Yes	State Government: Departments, agencies, etc. of the State of California
		03 - Other Government	3	Yes	Other Government Agency: Other governmental agencies, including: cities; counties; other states; foreign governments or governmental agencies; multi-national organizations such as the United Nations; or, quasi-governmental agencies or special districts, such as a water or pest control district.
		04 - Business/Profit Entity	4	Yes	Business/Profit Entity: Business or other entity engaged in activities for profit.
		05 - Non-profit	5	Yes	Non-Profit, Business Related: Non-profit organization sponsored by one or more business or other entities engaged in activities for profit, including: corporate foundations, industry or trade associations; and professional, union, or lobbying organizations.
		06 - Foundation/Charitable Trust	6	Yes	Foundation/Charitable Trust: Non-profit foundations or charitable trusts, as defined in The Foundation Directory; excluding corporate foundations; and, including funds or endowments designated by the Internal Revenue Service as private grant-making foundations, community foundations, family foundations, and charitable trusts.
		07 - Higher Education	7	Yes	Higher Education: Higher education institution or association such as: Harvard Institution/Association University, University of Michigan, or the American Association of Colleges of Pharmacy.
		08 - Campus Organization	8	Yes	Campus-Related Organization: Campus-related organization, including student groups, University support groups, alumni associations, etc.
		09 - Individual	9	Yes	Individual: Individuals, excluding incorporated professionals who should be coded 'Business/Profit Entity'.
		10 - Marketing Orders	10	Yes	Marketing Orders: Regulated Agricultural Marketing Order Boards
		11 - Unfunded	11	No	
		12 - Departmental	12	No	Carried out with either actual funding from Departmental funding source or by faculty and staff who receive salary support from Departmental funding.
		13 - Professional Association	13	Yes	Professional Association: medical / scientific professional association such as the American Medical Association
		99 - Unassigned	99	Yes	Unassigned: Sponsor not yet assigned to one of the above categories

The selected record is opened in an edit panel. Make desired changes to the fields in the panel.

**Save Category**

**\* Sponsor Type:** 13 - Scientific Professional Association

**\* Sort Order Number:**

**\* Include Sponsors of this group in Disclosure Search:**  Yes  No

**Description:**

At some institutions a numeric code is included in the **Sponsor Type** name, as shown above. The name should be distinct from any pre-existing items in the configuration list.

The **Sort Order Number** specifies the order in which sponsors appear in the configuration list and dropdown picklist of sponsors.

*Note: If a number that is already in use is selected, when this record is saved its **Sort Order Number** overrides any pre-existing item with the same sort order. The overridden item and all items that follow it in the list are incremented by one (1) and moved down one (1) position in the configuration list.*

Select “Yes” or “No” for **Include Sponsors of this group in Disclosure Search** field.

Enter a **Description** of the sponsor to assist system users in distinguishing it from other sponsors in the list.

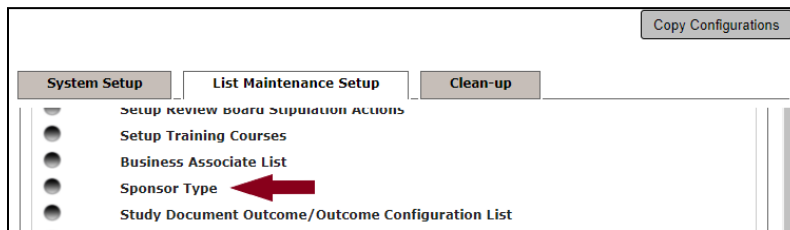
Click the **Save Category** button to save changes.

The record is revised on the **Setup Sponsor Type** page.

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		01 - Federal	1	Yes	Federal Government: Departments, agencies, etc. of the United States government.
		02 - State	2	Yes	State Government: Departments, agencies, etc. of the State of California
		03 - Other Government	3	Yes	Other Government Agency: Other governmental agencies, including: cities; counties; other states; foreign governments or governmental agencies; multi-national organizations such as the United Nations; or, quasi-governmental agencies or special districts, such as a water or pest control district.
		04 - Business/Profit Entity	4	Yes	Business/Profit Entity: Business or other entity engaged in activities for profit.
		05 - Non-profit	5	Yes	Non-Profit, Business Related: Non-profit organization sponsored by one or more business or other entities engaged in activities for profit, including: corporate foundations, industry or trade associations; and professional, union, or lobbying organizations.
		06 - Foundation/Charitable Trust	6	Yes	Foundation/Charitable Trust: Non-profit foundations or charitable trusts, as defined in The Foundation Directory; excluding corporate foundations; and, including funds or endowments designated by the Internal Revenue Service as private grant-making foundations, community foundations, family foundations, and charitable trusts.
		07 - Higher Education	7	Yes	Higher Education: Higher education institution or association such as: Harvard Institution/Association University, University of Michigan, or the American Association of Colleges of Pharmacy.
		08 - Campus Organization	8	Yes	Campus-Related Organization: Campus-related organization, including student groups, University support groups, alumni associations, etc.
		09 - Individual	9	Yes	Individual: Individuals, excluding incorporated professionals who should be coded 'Business/Profit Entity'.
		10 - Marketing Orders	10	Yes	Marketing Orders: Regulated Agricultural Marketing Order Boards
		11 - Unfunded	11	No	
		12 - Departmental	12	No	Carried out with either actual funding from Departmental funding source or by faculty and staff who receive salary support from Departmental funding.
		13 - Professional Association	13	Yes	Professional Association: medical / scientific professional association such as the American Medical Association
		99 - Unassigned	99	Yes	Unassigned: Sponsor not yet assigned to one of the above categories

## Delete Sponsor Type

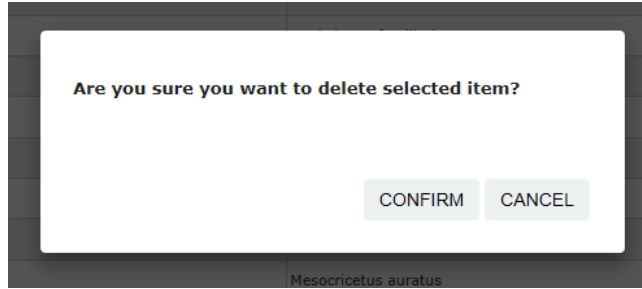
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Sponsor Type** link.



The **Setup Sponsor Type** page is opened. Click the icon in the **Delete** column for the applicable record.

Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		01 - Federal	1	Yes	Federal Government: Departments, agencies, etc. of the United States government.
		02 - State	2	Yes	State Government: Departments, agencies, etc. of the State of California
		03 - Other Government	3	Yes	Other Government Agency: Other governmental agencies, including: cities; counties; other states; foreign governments or governmental agencies; multi-national organizations such as the United Nations; or, quasi-governmental agencies or special districts, such as a water or pest control district.
		04 - Business/Profit Entity	4	Yes	Business/Profit Entity: Business or other entity engaged in activities for profit.
		05 - Non-profit	5	Yes	Non-Profit, Business Related: Non-profit organization sponsored by one or more business or other entities engaged in activities for profit, including: corporate foundations, industry or trade associations; and professional, union, or lobbying organizations.
		06 - Foundation/Charitable Trust	6	Yes	Foundation/Charitable Trust: Non-profit foundations or charitable trusts, as defined in The Foundation Directory; excluding corporate foundations; and, including funds or endowments designated by the Internal Revenue Service as private grant-making foundations, community foundations, family foundations, and charitable trusts.
		07 - Higher Education	7	Yes	Higher Education: Higher education institution or association such as: Harvard Institution/Association University, University of Michigan, or the American Association of Colleges of Pharmacy.
		08 - Campus Organization	8	Yes	Campus-Related Organization: Campus-related organization, including student groups, University support groups, alumni associations, etc.
		09 - Individual	9	Yes	Individual: Individuals, excluding incorporated professionals who should be coded 'Business/Profit Entity'.
		10 - Marketing Orders	10	Yes	Marketing Orders: Regulated Agricultural Marketing Order Boards
		11 - Unfunded	11	No	
		12 - Departmental	12	No	Carried out with either actual funding from Departmental funding source or by faculty and staff who receive salary support from Departmental funding.
		13 - Scientific Professional Association	13	Yes	Scientific Professional Association: medical / scientific professional association such as the American Medical Association
		99 - Unassigned	99	Yes	Unassigned: Sponsor not yet assigned to one of the above categories

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The record is deleted from the list on the **Setup Sponsor Type** page.

13 result(s) found...					Add a New Category
1 - 13					
Delete	Edit	Sponsor Type	Sort Order Number	Include in Disclosure Search	Description
		01 - Federal	1	Yes	Federal Government: Departments, agencies, etc. of the United States government.
		02 - State	2	Yes	State Government: Departments, agencies, etc. of the State of California
		03 - Other Government	3	Yes	Other Government Agency: Other governmental agencies, including: cities; counties; other states; foreign governments or governmental agencies; multi-national organizations such as the United Nations; or, quasi-governmental agencies or special districts, such as a water or pest control district.
		04 - Business/Profit Entity	4	Yes	Business/Profit Entity: Business or other entity engaged in activities for profit.
		05 - Non-profit	5	Yes	Non-Profit, Business Related: Non-profit organization sponsored by one or more business or other entities engaged in activities for profit, including: corporate foundations, industry or trade associations; and professional, union, or lobbying organizations.
		06 - Foundation/Charitable Trust	6	Yes	Foundation/Charitable Trust: Non-profit foundations or charitable trusts, as defined in The Foundation Directory; excluding corporate foundations; and, including funds or endowments designated by the Internal Revenue Service as private grant-making foundations, community foundations, family foundations, and charitable trusts.
		07 - Higher Education	7	Yes	Higher Education: Higher education institution or association such as: Harvard Institution/Association University, University of Michigan, or the American Association of Colleges of Pharmacy.
		08 - Campus Organization	8	Yes	Campus-Related Organization: Campus-related organization, including student groups, University support groups, alumni associations, etc.
		09 - Individual	9	Yes	Individual: Individuals, excluding incorporated professionals who should be coded 'Business/Profit Entity'.
		10 - Marketing Orders	10	Yes	Marketing Orders: Regulated Agricultural Marketing Order Boards
		11 - Unfunded	11	No	
		12 - Departmental	12	No	Carried out with either actual funding from Departmental funding source or by faculty and staff who receive salary support from Departmental funding.
		99 - Unassigned	99	Yes	Unassigned: Sponsor not yet assigned to one of the above categories

## Risk Assigned Configuration List

Where the property `rb.use_risk_assigned` is set to “Yes” (under IRB Assistant > Review Board Administration > Board Configuration Options > Study Board Properties, see screenshot below), the iRIS™ system allows for setup and maintenance of a **Risk Assigned Configuration List**. The list contains current risk ratings the review board can assign to studies.

My Workspaces ▾ IRB **Setup Board Properties** Back

Download Properties Script Save After Edit

**RB Properties List**

- Board Setup
- Submission Review Properties
- Document Processing
- Study Summary Info
- Consent Processing
- Reviewers
- Meeting Settings
- Security
- Fee tracking
- Multi-site Setup
- Recommendations and Stipulations
- **Study Board Properties**
- Amendments
- Submission Prereview
- Letter
- Submissions
- Notification
- Internal Routing
- Training

Property Name	Property Value
rb.use_irb_expedited_category	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_irb_hipaa	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_irb_investigational_device_use	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_irb_investigational_drug_use	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_irb_minor_risk_assessment	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_irb_risk_level	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_irb_waiver_of_consent	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_last_continue_review_approved	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_parental_permission	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_pregnant_women	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_prisoners	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_problem_deviation_noncompliance	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_regulatory_determination1	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_regulatory_determination2	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_risk_assigned	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_risk_group	<input type="radio"/> Yes <input checked="" type="radio"/> No
rb.use_room_by_cage	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_srb_continuing_review_expedited_category	<input checked="" type="radio"/> Yes <input type="radio"/> No
rb.use_srb_exempt_category	<input checked="" type="radio"/> Yes <input type="radio"/> No

Setting the property to “Yes” populates a **Risk Assigned Configuration List** link on the List Maintenance Setup tab, as shown in the example below.

- Invoice Payment Type
- Setup Review Board Stipulation Actions
- Setup Training Courses
- Business Associate List
- Sponsor Type
- **Risk Assigned Configuration List** ←
- Study Document Outcome / Outcome Configuration List

The list defined here is available for assigning risk to a study within the **Outcome** tab of the submission processing screens, as shown below.

Save the Submission Outcome

- General Information
- Submission Components
- Correspondence
- Submission History
- Pre-review Screening
- Review Checklist and Comments
- Review Summary
- Submission Discussion
- Recommendation
- Stipulation
- Internal Submission Routing
- Expedited by
- Outcome**

Continuing Review Due:

Study Follow-up:

Protocol Closure:

Temporary Closed:  Yes  No

Temporary Closure Start:

Temporary Closure End:

Risk Assigned: --none--  
 None  
Exempt  
Greater than Minimal Risk under 45 CFR 46 / 21 CFR  
High  
Minimal  
Moderate  
Test Review  
Test Review1232

Adult Risk Assigned:

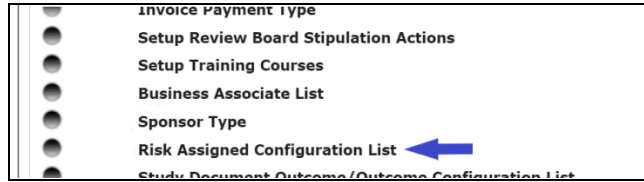
Adult Benefit Assigned:

Pediatric Risk Assigned:

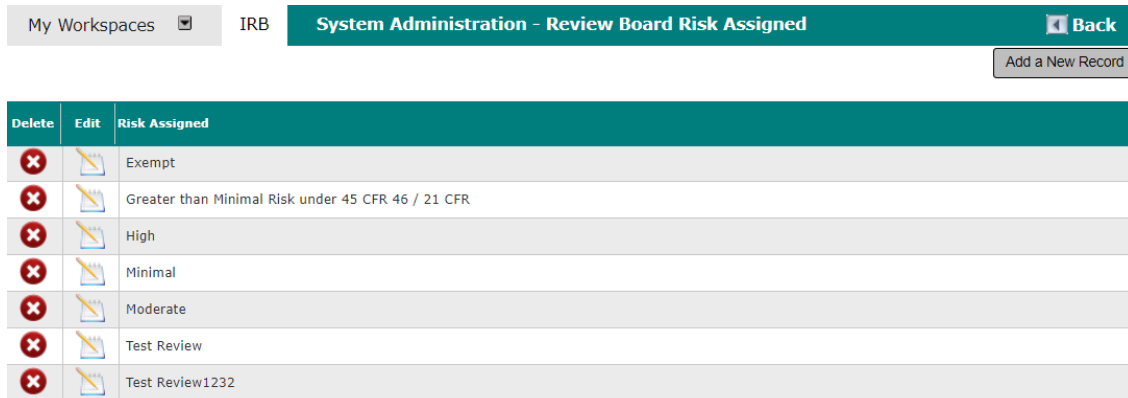
Exempt:

## Add Risk

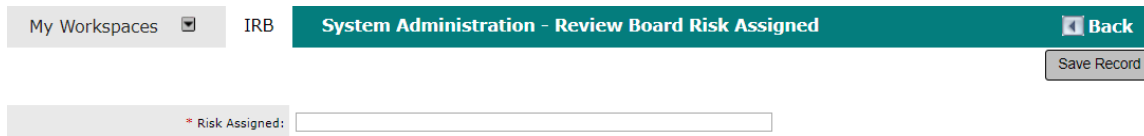
Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Risk Assigned Configuration List** link.



As shown below, the **Review Board Risk Assigned** page opens.



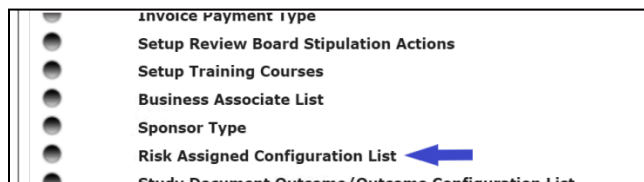
Click the **Add a New Record** button. An add form opens, as shown below.



Enter desired text for **Risk Assigned** and click the **Save Record** button. The add form closes and the new **Risk** is added to the list on the **Review Board Risk Assigned** page.

## Edit Risk

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Risk Assigned Configuration List** link.



As shown below, the **Review Board Risk Assigned** page opens.

My Workspaces	IRB	System Administration - Review Board Risk Assigned		Back
Add a New Record				
Delete	Edit	Risk Assigned		
		Exempt		
		Greater than Minimal Risk under 45 CFR 46 / 21 CFR		
		High		
		Minimal		
		Moderate		
		Test Review		
		Test Review1232		

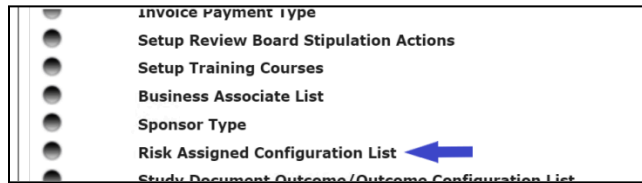
Click the applicable icon in the **Edit** column. The applicable record is opened in an edit form, as shown below.

My Workspaces	IRB	System Administration - Review Board Risk Assigned		Back
Save Record				
* Risk Assigned: <input type="text" value="Exempt"/>				

Revised the **Risk Assigned** text as desired and click the **Save Record** button. The edit form closes and the new **Risk** is revised in the list on the **Review Board Risk Assigned** page.

### Delete Risk

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Risk Assigned Configuration List** link.

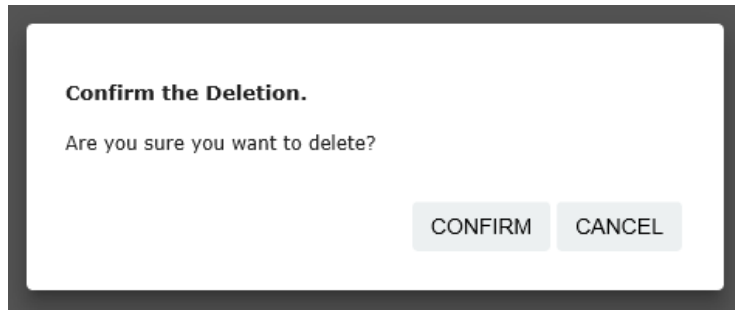


As shown below, the **Setup Adult Risk Assigned List** page opens.

My Workspaces	IRB	System Administration - Review Board Risk Assigned		Back
Add a New Record				
Delete	Edit	Risk Assigned		
		Exempt		
		Greater than Minimal Risk under 45 CFR 46 / 21 CFR		
		High		
		Minimal		
		Moderate		
		Test Review		
		Test Review1232		

Click the **Delete** column icon for the item to be deleted.

A confirmation popup window displays.

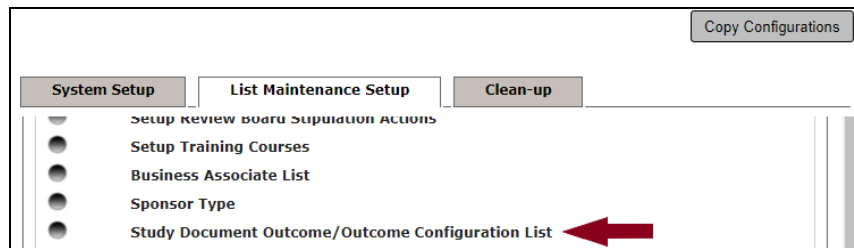


Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The item is deleted from the list on the **Review Board Risk Assigned** page.

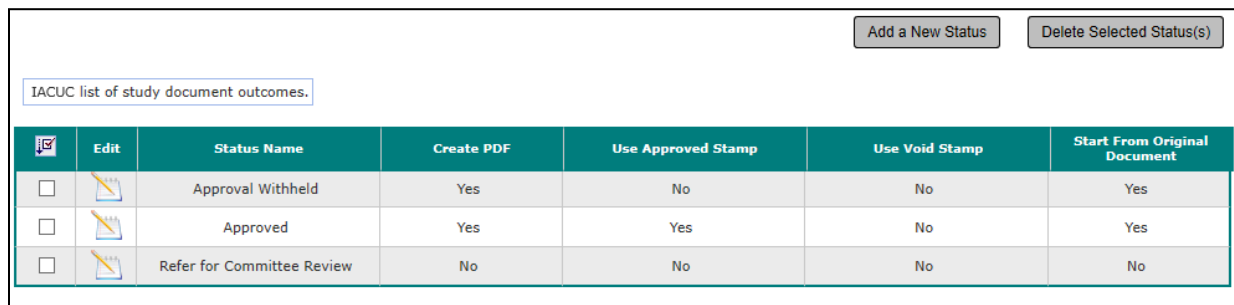
## Study Document Outcome/Outcome Configuration List

The Document Outcome/Outcome Configuration List is where a list of boilerplate outcome statuses approved for use in studies is maintained in the iRIS™ system. To view the list, navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.



The **Setup Protocol Document Outcome** page is opened.

*Note that at some institutions, the term “Study” is substituted for “Protocol”. These terms may be used interchangeably in manual text and screenshots.*



A screenshot of the "Setup Protocol Document Outcome" page. It features a search bar with the text "IACUC list of study document outcomes." and two buttons: "Add a New Status" and "Delete Selected Status(s)". Below is a table with columns for "Status Name", "Create PDF", "Use Approved Stamp", "Use Void Stamp", and "Start From Original Document".

<input checked="" type="checkbox"/>	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
<input type="checkbox"/>		Approval Withheld	Yes	No	No	Yes
<input type="checkbox"/>		Approved	Yes	Yes	No	Yes
<input type="checkbox"/>		Refer for Committee Review	No	No	No	No

## Study Document Outcome List Implementation – Application Side

Study document outcomes are assigned by the applicable review board, making this functionality inapplicable on the application side.

## Study Document Outcome List Implementation – Board Side

The study document outcome list is employed in the following areas on the review board / system setup side of iRIS™.

**Submission processing** — the Study Document Outcome list is employed as a dropdown picklist in the **Outcome** field when approving a study document within submission processing screens, as shown in the IACUC example below

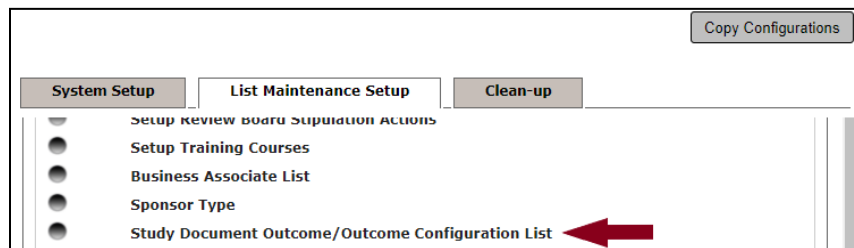
The screenshot shows a form for IACUC submission processing. At the top, there are fields for 'My Workspaces', 'IACUC Number: A12-020', 'Alias: VA Merit: Arrestin Regulation o ...', and 'PI: Hauger, Richard L'. Below this is a table with the following fields:

* Document Title:	12-020 Figure 1
* Category:	ACORP Diagram
Comments:	
Description:	ACORP Section C2 Figure 1
Version Date:	07/26/2012
* Version Number:	1.0
Sponsor Version:	
Outcome:	--none--
Approval Date:	Approval Withheld
Expiration Date:	Approved

The 'Outcome' dropdown menu is open, showing the following options: --none-- (selected), Approval Withheld, Approved, Modifications Required to Secure Approval with DMR, Modifications Required to Secure Approval with FCR, Refer to Full Committee Review, and Void.

## Add Study Document Outcome

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.



The **Setup Protocol Document Outcome** page is opened. Click the **Add a New Status** button.

		Add a New Status		Delete Selected Status(s)		
IACUC list of study document outcomes.						
<input checked="" type="checkbox"/>	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
<input type="checkbox"/>		Approval Withheld	Yes	No	No	Yes
<input type="checkbox"/>		Approved	Yes	Yes	No	Yes
<input type="checkbox"/>		Refer for Committee Review	No	No	No	No

An **add a review outcome** panel is opened for creation of the new record. Below, the blank form is shown with the default selection of “No” in place for **Create PDF**.

Save Protocol Document Outcome

IACUC add a review outcome.

**\*Outcome Status:**

**\*Create PDF:**  Yes  No

When “Yes” is selected for **Create PDF**, indicating that the document given this outcome is to be converted to a PDF, three additional fields pertaining to PDF settings are unlocked with default selections set to “No”.

*Note that **Create PDF** must be set to “Yes” for any document to which an electronic document stamp will be applied.*

Save Protocol Document Outcome

IACUC add a review outcome.

**\*Outcome Status:**

**\*Create PDF:**  Yes  No

**\*Use Approved Stamp:**  Yes  No

**\*Use Void Stamp:**  Yes  No

**\*Start From Original Document:**  Yes  No

**Use Approved Stamp** – This option is only available where the review board property “rb.stamp\_study\_doc” (under IRB Assistant > Review Board Administration > Board Configuration Options > Document Processing) is turned on. When this option is set to “Yes”, the study document PDF with this outcome assigned will have an electronic approval stamp applied.

**Use Void Stamp** – When this option is set to “Yes”, the study document PDF with this outcome assigned will have an electronic VOID watermark applied.

**Start From Original Document** - When this option is set to “Yes”, the assigned outcome is applied to the original document. When this option is set to “No”, the assigned outcome is applied to a PDF of the original document that was previously created as part of a prior outcome.

*This setting is useful in cases where the review board needs to revisit a study document and assign a different outcome. For example, when a PDF document with a VOID watermark is subsequently approved, **Start from Original Document** must be set to “Yes” to ensure the VOID watermark is removed from the document.*

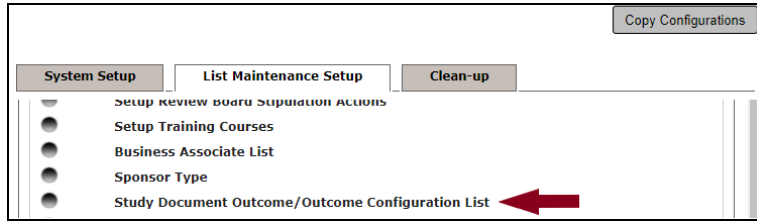
Fill the form as desired and click the **Save Study Document Outcome** button.

The outcome is added on the **Setup Protocol Document Outcome** list page.

<input checked="" type="checkbox"/>	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
<input type="checkbox"/>		Approval Withheld	Yes	No	No	Yes
<input type="checkbox"/>		Approved	Yes	Yes	No	Yes
<input type="checkbox"/>		Modifications Required to Secure Approval with DMR	Yes	No	No	Yes
<input type="checkbox"/>		Refer for Committee Review	No	No	No	No

### Edit Study Document Outcome

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.



The **Setup Protocol Document Outcome** page is opened. Click the icon in the **Edit** column for the applicable record.

Add a New Status    Delete Selected Status(s)

IACUC list of study document outcomes.

<input checked="" type="checkbox"/>	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
<input type="checkbox"/>		Approval Withheld	Yes	No	No	Yes
<input type="checkbox"/>		Approved	Yes	Yes	No	Yes
<input type="checkbox"/>		Modifications Required to Secure Approval with DMR	Yes	No	No	Yes
<input type="checkbox"/>		Refer for Committee Review	No	No	No	No

The record is opened in an **edit a review outcome** panel.

Save Protocol Document Outcome

IACUC edit a review outcome.

\*Outcome Status:

\*Create PDF:  Yes  No

When “Yes” is selected for **Create PDF**, indicating that the document given this outcome is to be converted to a PDF, three additional fields pertaining PDF settings are unlocked with default selections set to “No”.

*Note that **Create PDF** must be set to “Yes” for any document to which an electronic document stamp will be applied.*

Save Protocol Document Outcome

IACUC add a review outcome.

\*Outcome Status:

\*Create PDF:  Yes  No

\*Use Approved Stamp:  Yes  No

\*Use Void Stamp:  Yes  No

\*Start From Original Document:  Yes  No

**Use Approved Stamp** – This option is only available where the Review Board Property “rb.stamp\_study\_doc” (under IRB Assistant > Review Board Administration > Board Configuration Options > Document Processing) is turned on. When this option is set to “Yes”, the study document PDF with this outcome assigned will have an electronic approval stamp applied.

**Use Void Stamp** – When this option is set to “Yes”, the study document PDF with this outcome assigned will have an electronic **VOID** watermark applied.





**Start From Original Document** - When this option is set to “Yes”, the assigned outcome is applied to the original document. When this option is set to “No”, the assigned outcome is applied to a PDF of the original document that was previously created as part of a prior outcome.

*This setting is useful in cases where the review board needs to revisit a study document and assign a different outcome. For example, when a PDF document with a VOID watermark is subsequently approved, **Start from Original Document** must be set to “Yes” to ensure the VOID watermark is removed from the document.*

Edit the record as desired and click the **Save Protocol Document Outcome** button. The edit panel is closed, and the record is revised on the **Setup Protocol Document Outcome** list page.

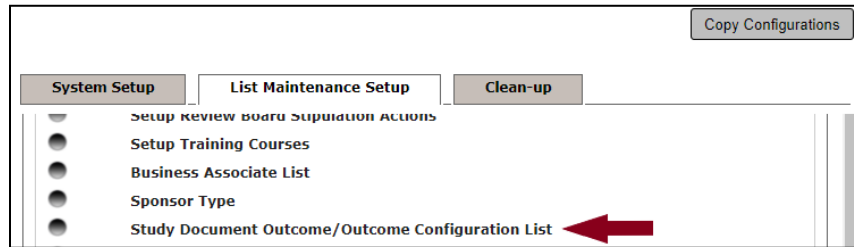
Add a New Status Delete Selected Status(s)

IACUC list of study document outcomes.

<input type="checkbox"/>	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
<input type="checkbox"/>		Approval Withheld	Yes	No	No	Yes
<input type="checkbox"/>		Approved	Yes	Yes	No	Yes
<input type="checkbox"/>		Modifications Required to Secure Approval with DMR	Yes	No	No	Yes
<input type="checkbox"/>		Refer for Full Committee Review	No	No	No	No

## Delete Study Document Outcome

Navigate to IRB Assistant > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.



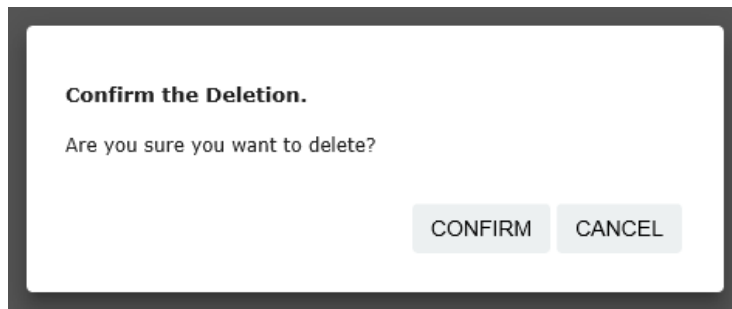
The **Setup Protocol Document Outcome** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Status(s)** button.

The screenshot shows a table with the following data:

	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
<input type="checkbox"/>		Approval Withheld	Yes	No	No	Yes
<input type="checkbox"/>		Approved	Yes	Yes	No	Yes
<input type="checkbox"/>		Modifications Required to Secure Approval with DMR	Yes	No	No	Yes
<input type="checkbox"/>		Refer for Full Committee Review	No	No	No	No

Buttons: 'Add a New Status' and 'Delete Selected Status(s)' (highlighted with a red box).

A confirmation popup window displays.

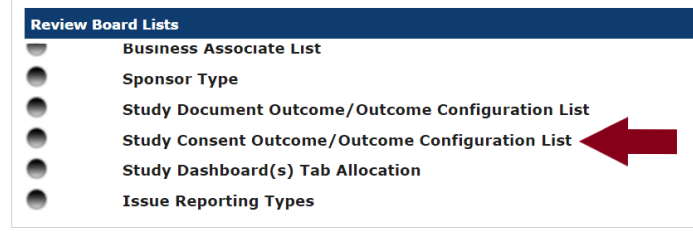


Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The record is deleted from the **Setup Protocol Document Outcome** page.

## Study Consent Outcome/Outcome Configuration List

A list of preconfigured Consent outcomes is maintained on the Setup Study Consent Outcome page. To access the page, navigate to Review Board Administration > [List Maintenance Setup tab] > **Study Consent Outcome/Outcome Configuration List** link.



Click the link to open the **Setup Study Consent Outcome** page, shown below.

A screenshot of the "Setup Study Consent Outcome" page. The page header includes "My Workspaces", "IRB", and "Setup Study Consent Outcome" with a "Back" button. Below the header are buttons for "Add a New Status" and "Delete Selected Status(s)". A text box contains "IRB list of study consent outcomes." Below this is a table with the following data:

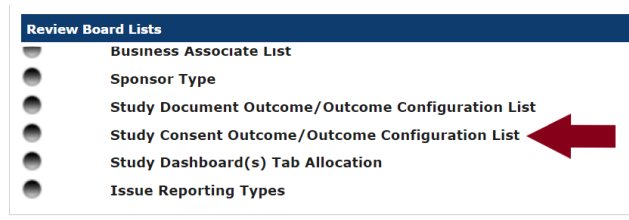
	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Consent
		Approved	Yes	Yes	No	Yes
		Not Valid	No	No	No	No
		Void	Yes	No	Yes	Yes
		Changes Requested	No	No	No	No
		See Modifications	No	No	No	No

All previously configured Consent outcomes are listed on the page.

Notice that outcomes of "Approved", "Not Valid", "Void", "Changes Requested" and "See Modifications" are pre-populated in the list by default. These outcomes are reserved, and cannot be revised or deleted.

### Add Study Consent Outcome

Navigate to Review Board Administration > [List Maintenance Setup tab] > **Study Consent Outcome/Outcome Configuration List** link.



Click the link to open the **Setup Study Consent Outcome** page, shown below.

My Workspaces ▾ IRB Setup Study Consent Outcome Back

Add a New Status Delete Selected Status(s)

IRB list of study consent outcomes.

PDF	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Consent
		Approved	Yes	Yes	No	Yes
		Not Valid	No	No	No	No
		Void	Yes	No	Yes	Yes
		Changes Requested	No	No	No	No
		See Modifications	No	No	No	No

Click the **Add a New Status** button.

My Workspaces ▾ IRB Setup Study Consent Outcome Back

Save Study Consent Outcome

IRB add a review outcome.

\*Outcome Status:

\*Create PDF:  Yes  No

Enter the desired **Outcome Status**.

My Workspaces ▾ IRB Setup Study Consent Outcome Back

Save Study Consent Outcome

IRB add a review outcome.

\*Outcome Status:

\*Create PDF:  Yes  No

\*Use Approved Stamp:  Yes  No

\*Use Void Stamp:  Yes  No

\*Start From Original Consent:  Yes  No

The **Create PDF** field is set to “No” by default. As shown above, changing the selection to “Yes” populates the following fields, which all default to “No”:

**Use Approved Stamp** – select “Yes” to include the Approved stamp on the PDF; this option is appropriate for Consent outcomes of an ‘approved’ type ONLY

**Use Void Stamp** – select “Yes” to include the Void stamp on the PDF; this option is appropriate for Consent outcomes OTHER than an ‘approved’ type

**Start From Original Consent** – select “Yes” to default to the original Consent document when the PDF is printed; this option is appropriate in cases where it is desirable to revert to the original Consent document during review

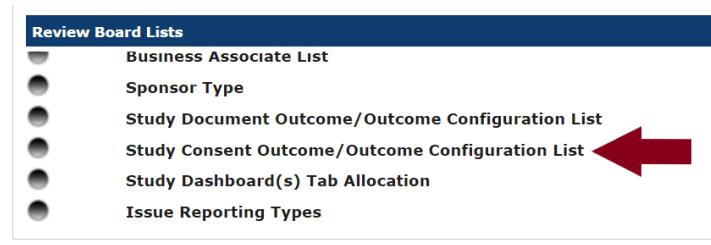
When all selections are complete, click the **Save Study Consent Outcome** button.

IRB	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Consent
		Approved	Yes	Yes	No	Yes
		Not Valid	No	No	No	No
		Void	Yes	No	Yes	Yes
		Changes Requested	No	No	No	No
		See Modifications	No	No	No	No
<input type="checkbox"/>		Administrative Hold	Yes	No	No	No

As shown above, the new outcome is added to the list on the **Setup Study Consent Outcome** page.

### Edit Study Consent Outcome

Navigate to Review Board Administration > [List Maintenance Setup tab] > **Study Consent Outcome/Outcome Configuration List** link.



Click the link to open the **Setup Study Consent Outcome** page, shown below.

IRB	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Consent
		Approved	Yes	Yes	No	Yes
		Not Valid	No	No	No	No
		Void	Yes	No	Yes	Yes
		Changes Requested	No	No	No	No
		See Modifications	No	No	No	No
<input type="checkbox"/>		Temporary Administrative Hold	Yes	No	No	No

Click the icon in the **Edit** column for the applicable Consent outcome. The record is opened in an edit form, as shown below.

The screenshot shows the 'Setup Study Consent Outcome' form. At the top, there is a navigation bar with 'My Workspaces' and 'IRB'. The main title is 'Setup Study Consent Outcome' with a 'Back' button. A 'Save Study Consent Outcome' button is located in the top right. Below the title, there is a text box containing 'IRB edit a review outcome.'. The form contains several fields: '\*Outcome Status:' with a dropdown menu showing 'Temporary' and 'Administrative Hold'; '\*Create PDF:' with radio buttons for 'Yes' (selected) and 'No'; '\*Use Approved Stamp:' with radio buttons for 'Yes' and 'No' (selected); '\*Use Void Stamp:' with radio buttons for 'Yes' and 'No' (selected); and '\*Start From Original Consent:' with radio buttons for 'Yes' and 'No' (selected).

Make desired changes to the **Outcome Status**, as shown above.

The screenshot shows the 'Setup Study Consent Outcome' form. At the top, there is a navigation bar with 'My Workspaces' and 'IRB'. The main title is 'Setup Study Consent Outcome' with a 'Back' button. A 'Save Study Consent Outcome' button is located in the top right. Below the title, there is a text box containing 'IRB add a review outcome.'. The form contains several fields: '\*Outcome Status:' with a dropdown menu showing 'Administrative Hold'; '\*Create PDF:' with radio buttons for 'Yes' and 'No' (selected), highlighted with a red box; '\*Use Approved Stamp:' with radio buttons for 'Yes' and 'No' (selected); '\*Use Void Stamp:' with radio buttons for 'Yes' and 'No' (selected); and '\*Start From Original Consent:' with radio buttons for 'Yes' and 'No' (selected).

Where the **Create PDF** field is set “No”, no other fields appear on the page. As shown above, setting the selection to “Yes” populates the following fields, which all default to “No”:

**Use Approved Stamp** – select “Yes” to include the Approved stamp on the PDF; this option is appropriate for Consent outcomes of an ‘approved’ type ONLY

**Use Void Stamp** – select “Yes” to include the Void stamp on the PDF; this option is appropriate for Consent outcomes OTHER than an ‘approved’ type



**Start From Original Consent** – select “Yes” to default to the original Consent document when the PDF is printed; this option is appropriate in cases where it is desirable to revert to the original Consent document during review

When all selections are complete, click the **Save Study Consent Outcome** button.

My Workspaces ▾ IRB **Setup Study Consent Outcome** Back

Add a New Status Delete Selected Status(s)

IRB list of study consent outcomes.

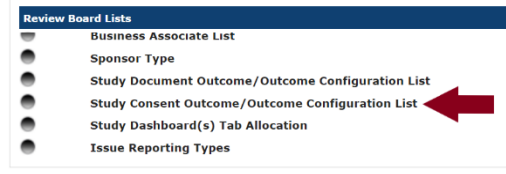
	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Consent
		Approved	Yes	Yes	No	Yes
		Not Valid	No	No	No	No
		Void	Yes	No	Yes	Yes
		Changes Requested	No	No	No	No
		See Modifications	No	No	No	No
<input type="checkbox"/>		Temporary Administrative Hold	Yes	No	No	No

As shown above, the Consent outcome is revised in the list on the **Setup Study Consent Outcome** page.

Notice that the revised item has an icon in the **Edit** column and a select checkbox in the far left column to be used for deleting the record, if desired. Pre-existing, default Consent outcomes do not have icons in the **Edit** column or select checkboxes for deletion, as they cannot be revised or deleted.

### Delete Study Consent Outcome

Navigate to Review Board Administration > [List Maintenance Setup tab] > **Study Consent Outcome/Outcome Configuration List** link.





Click the link to open the **Setup Study Consent Outcome** page, shown below.

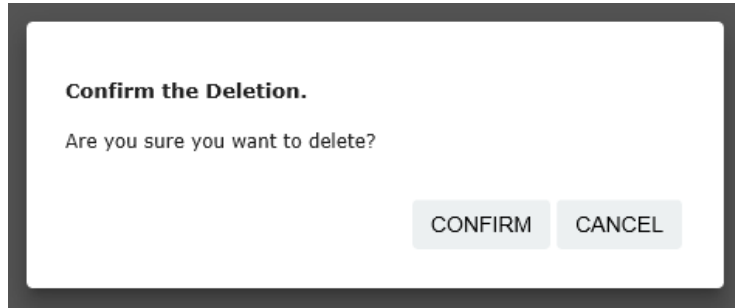
My Workspaces ▾ IRB **Setup Study Consent Outcome** Back

Add a New Status Delete Selected Status(s)

IRB list of study consent outcomes.

	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Consent
		Approved	Yes	Yes	No	Yes
		Not Valid	No	No	No	No
		Void	Yes	No	Yes	Yes
		Changes Requested	No	No	No	No
		See Modifications	No	No	No	No
<input checked="" type="checkbox"/>		Temporary Administrative Hold	Yes	No	No	No

Click to select the applicable checkbox(es) in the far-left column and click the **Delete Selected Status(es)** button, as shown above. A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to complete deletion of the record. The record is deleted from the **Setup Study Consent Outcome** page.

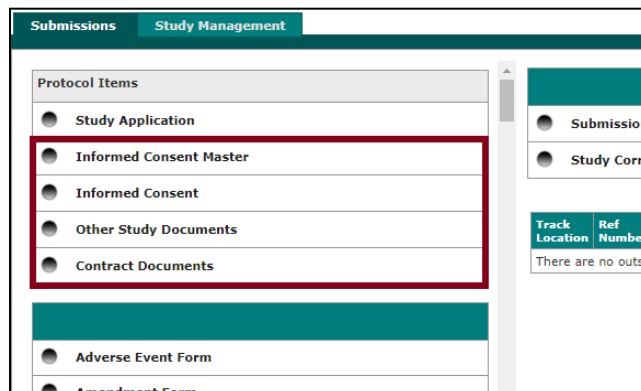
The screenshot shows a web interface for "Setup Study Consent Outcome". At the top, there are tabs for "My Workspaces" and "IRB", and a "Back" button. Below the tabs are two buttons: "Add a New Status" and "Delete Selected Status(s)". A text input field contains "IRB list of study consent outcomes.". Below this is a table with the following data:

	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Consent
		Approved	Yes	Yes	No	Yes
		Not Valid	No	No	No	No
		Void	Yes	No	Yes	Yes
		Changes Requested	No	No	No	No
		See Modifications	No	No	No	No

## Study Dashboard(s) Tab Allocation

A central dashboard page for document upload and management is provided for each major type of document as configured by the institution. Most institutions use Consent and Other Study Documents document types, but some have additional document types configured.

The screenshot below demonstrates an institution with four major document types configured, and therefore four document management dashboards: Informed Consent Master, Informed Consent, Other Study Documents and Contract Documents.

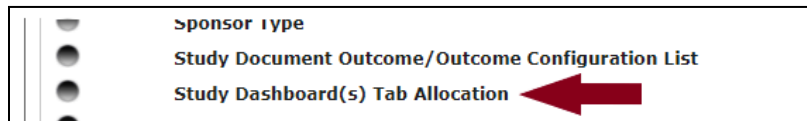


## IRB Assistant — List Maintenance iRIS™ v13.01

The dashboard pages are shared across the study submission and board sides of processing, as well as across review boards, ensuring that all personnel at all stages of submission processing have visibility of, and access to, the same versions of attached documents at all times. As shown below for the **Other Study Documents** type, each new dashboard contains a tabbed list table.

View History	Edit	Version	Title	Document Outcome	Approval Date	Expiration Date	File	Stamped File	Checked Out By	Hide
		1.0 01/07/2020	Study Contact List General Study Document	Approved w/o Stamp	03/18/2020	09/18/2020		57.86 KB		
		1.0 03/04/2020	Credentialing Review IBC Approval				58.11 KB			
		5.0 01/08/2020	Data Use Agreement / HIPAA Guidelines Data Use Agreement / Data Transfer Agreement (DUA/DTA)				58.11 KB			
		6.0 03/18/2020	HIPAA Disclosure and Authorization HIPAA Authorization				58.11 KB			
		8.1 03/18/2020	Study Proposed Schedule *Revision modified by the Second IRB Study Timeline	Void				58.47 KB		

The iRIS™ system allows institutions to configure the order in which study status tabs appear on study dashboards. Configuration of this feature is accessed via RB Assistant > Review Board Administration > List Maintenance Setup tab > **Study Dashboard(s) Tab Allocation** link.

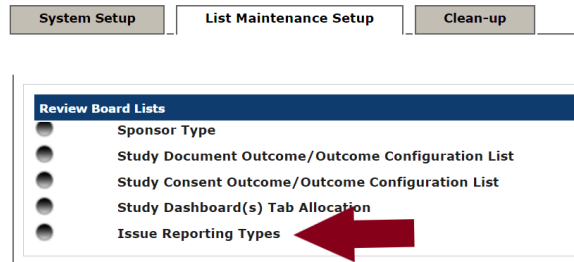


See the Document Management manual for more information about this feature.

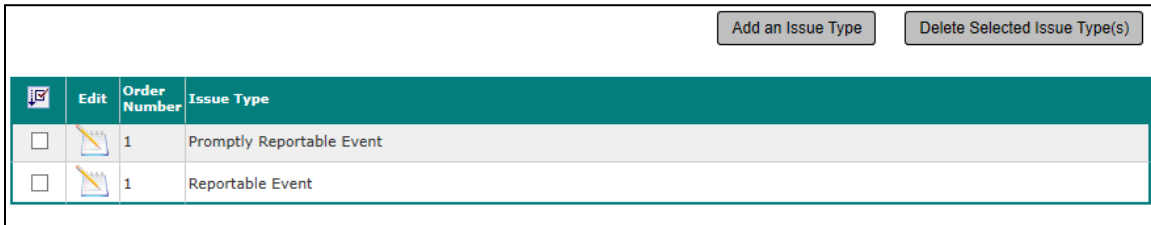
## Issue Reporting Types

Institutions involved in IRB or IACUC research activity must report any issues that arise and have the potential to impact on any aspect of research activities. Each institution has its own internal policies for issue reporting, categorization, management and resolution.

The **Issue Reporting Types** list is where a list of issue reporting types can be maintained by institutions in the iRIS™ system. To access the list, navigate to IRB Assistant > Review Board Administration > **List Maintenance Setup** tab and click the **Issue Reporting Types** link.



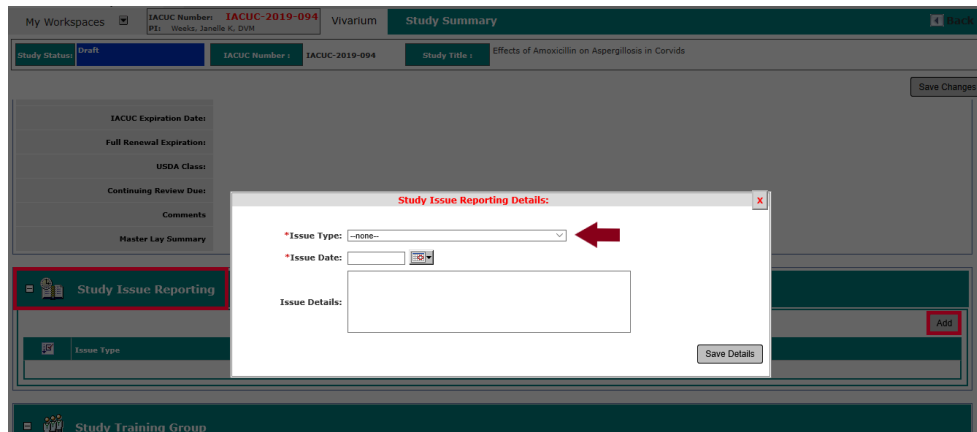
The Setup Issue Type List page is opened.



### Issue Type Implementation – Application Side

The issue type list is employed in the following areas on the application side of iRIS™.

Issue reporting functionality on the application side is accessed via Find a Study > [study opened] > Study Management tab > Study Summary/Profile link.



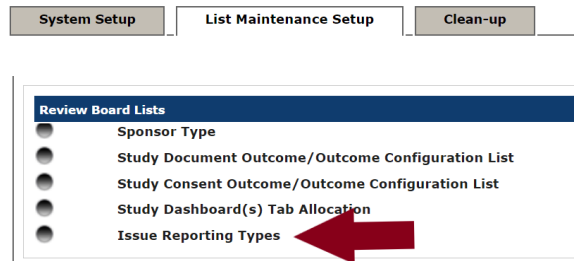
For more information about the study application, see the Study Assistant Manual.

### Issue Type Implementation – Board Side

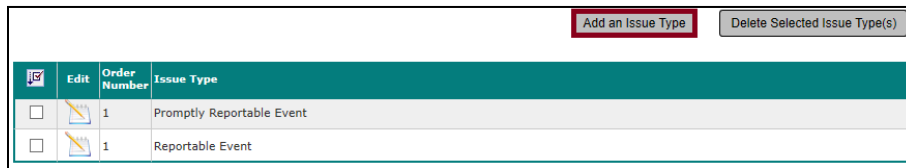
Issues are reported on the application/study side at the time they occur. This list is not applicable to the board side of processing.

## Add Issue Type

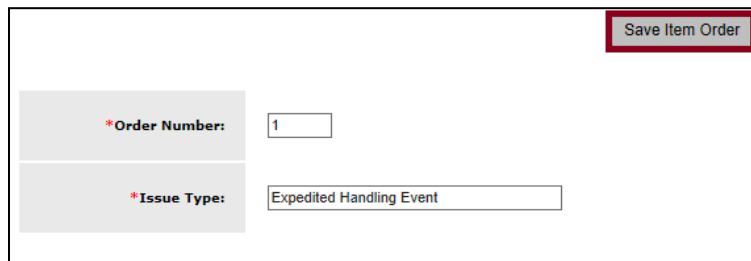
Navigate to IRB Assistant > Review Board Administration > **List Maintenance Setup** tab and click the **Issue Reporting Types** link.



The **Setup Issue Type List** page is opened. Click the **Add an Issue Type** button.



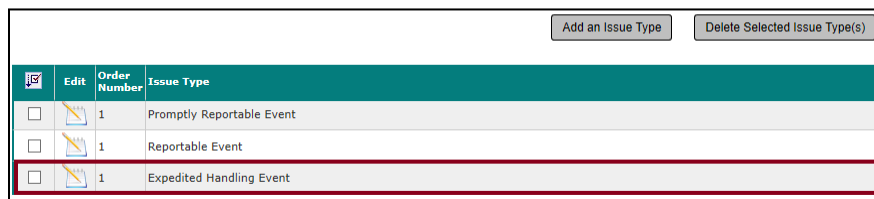
An add panel is opened for creation of the new record.



Enter an **Order Number** and enter the desired designation in the **Issue Type** field, then click the **Save Item Order** button to save the record and close the add panel.

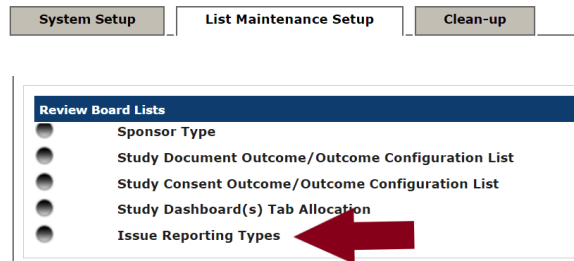
*Note that the **Order Number** field is generally used to indicate the priority level of the **Issue Type**, according to the institution's internal policies.*

The record is added to the **Setup Issue Type List**.

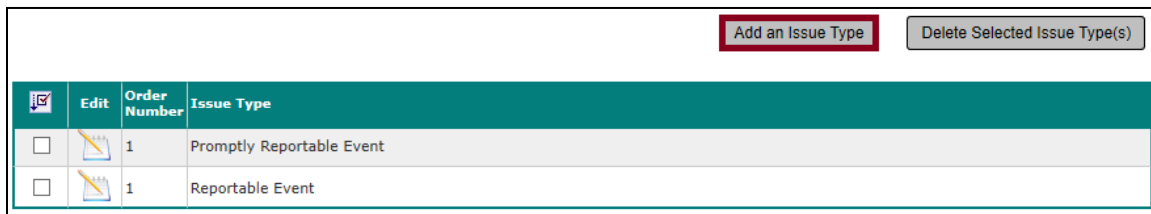


## Edit Issue Type

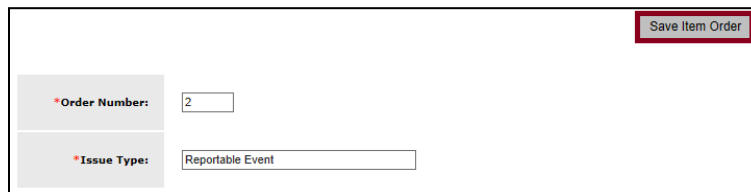
Navigate to IRB Assistant > Review Board Administration > **List Maintenance Setup** tab and click the **Issue Reporting Types** link.



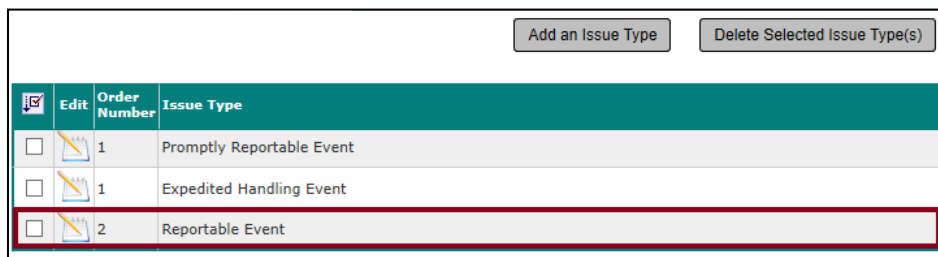
The **Setup Issue Type List** page is opened. Click the **Add an Issue Type** button.



The record is opened in an edit panel.

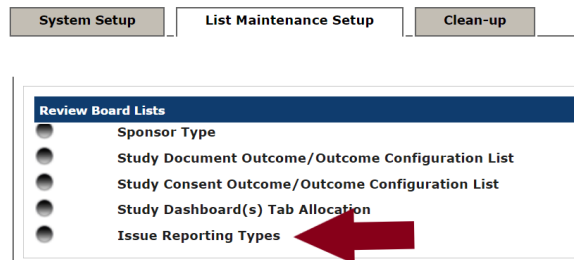


Make desired changes and click the **Save Item Order** button to save the record and close the edit panel. The record is revised on the **Setup Issue Type List**.

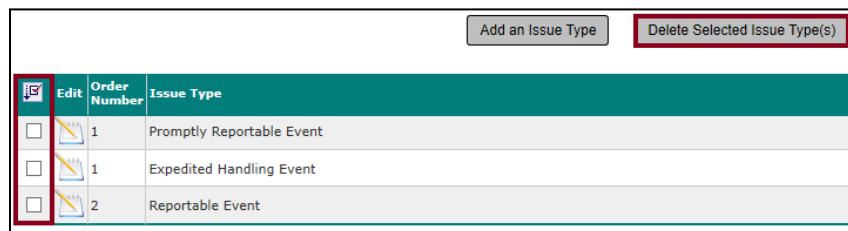


## Delete Issue Type

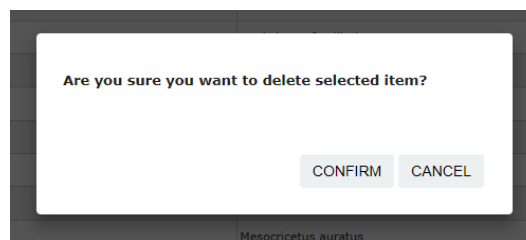
Navigate to IRB Assistant > Review Board Administration > **List Maintenance Setup** tab and click the **Issue Reporting Types** link.



The **Setup Issue Type List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Issue Type(s)** button.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Issue Type List** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Issue Type List** page. The record is deleted from the list on the **Setup Issue Type List** page.