

Three Scenarios for Copying a Submitted New IRB Research Application

Scenario 1: For a Study that is/was previously approved:

- From the Study, scroll down to the “Reference xForms” section. In the “Action” column, click the “stack of paper” icon (highlighted).

- The resulting screen presents two options. Select “copy” (highlighted).

This will create a “New IRB Research” xform in a different tab.

Choose an Action

Copy

Use this option if you want to start a new application using this application as template. Most answers will copy, but attachments will need to be uploaded and certain questions will need to be re-answered.

Copy for Amendment

Use this option if you want to AMEND the current study. Most answers, including attachments will copy and be editable. You will use this mechanism to request changes to the study, such as requesting additional subjects or changing recruitment, consent or protocol procedures. You will also use this amendment to request a change of PI, however, changes to other study personnel will be done through the Simple Personnel Amendment.

Scenario 2: For a Study that was reviewed but never approved (has a Study number):

1. From the Study, scroll down to the “Events” section. Click “Initial Application Submission” (highlighted).

The screenshot shows the IRB system interface for Study 300833-UT. The left sidebar contains navigation menus for Actions, Recent Items, Useful Links, and My Docs & xForms. The main content area displays study metadata, including Sponsor(s), Department, and Funding information. Below this, sections for Study Reference Documents, Study-Site, Study-Site Contacts, Reference xForms, and Study-Site Attachments are visible. The 'Events (1)' section is expanded, showing a table with one entry: 'Initial Application Submission' with 1 attachment, dated 10/30/2020.

Event	Att	FE	Instance/UDF	Start	Complete	Last Mtg	Group
Initial Application Submission	1		test new hospital question	10/30/2020			

2. In the left menu, under “Actions” click “xForms.” In the Action column, click the “stack of paper” icon (highlighted). This will create a “New IRB Research” xform in a different tab.

The screenshot shows the 'Forms on Event Details' page for the 'Initial Application Submission' event. The left sidebar shows the 'Actions' menu with 'xForms' highlighted. The main content area displays a table of forms associated with the event. A 'New IRB Research (Reference xForm)' is listed with a 'stack of paper' icon highlighted in the Action column.

Action	Form	Identifier	Stage/Status	Started	Submitted	By
	New IRB Research (Reference xForm)	test new hospital question	Complete	10/30/2020	10/30/2020	System, The

Scenario 3: For an xForm that was never reviewed (does not have a study number):

- From the Dashboard in IRB Manager, in the left menu, under the heading “My Docs & xForms,” click “xforms” (highlighted).

The screenshot shows the IRB Manager dashboard. On the left sidebar, under the heading "My Docs & xForms", the "xForms" link is highlighted in yellow. The main content area displays several summary boxes: "Studies (111 Active)", "xForms (21 Active)", and "Events (5 Open)". The "xForms (21 Active)" box lists: "You have 15 unsubmitted xForms.", "You have 6 xForms being processed at a later stage.", and "There are 2 xForms awaiting your attention." Below these boxes is a pie chart and a table titled "My Studies (111 Active)". On the right side, there is an "Important Information" box with a "Welcome to IRBManager" message and contact information for help.

- Find the New IRB Research xForm that you want to copy and then click the “stack of paper” icon (highlighted) next to “New IRB Research.” This will create a “New IRB Research” xForm in a different tab.

The screenshot shows the "My Forms" page in IRB Manager. At the top, there is a "What's this?" information box. Below it is a table of xForms. The table has columns for Action, Form, Identifier, Owner, Stage, and As Of. The "New IRB Research" row is highlighted, and a yellow "stack of paper" icon is visible next to it. The "Identifier" for this form is "Testing adding submitter approach to Study-Site contact list - PI is submitter". The "Owner" is "Initial Application Submission 300943-UT". The "Stage" is "Admin Post-Review Processing (2nd time)" and the "As Of" date is "03/29/2021".

Action	Form	Identifier	Owner	Stage	As Of
	Simple Personnel Amendment	[REDACTED]	[REDACTED]	Admin Pre-Review	04/29/2021
	IACUC Animal Use Protocol Form	[REDACTED]	[REDACTED]	Complete	03/30/2021
	New IRB Research	Testing adding submitter approach to Study-Site contact list - PI is submitter	Initial Application Submission 300943-UT	Admin Post-Review Processing (2nd time)	03/29/2021
	IBC Protocol Form	[REDACTED]	[REDACTED]	Complete	03/29/2021

IMPORTANT NOTE: If you are looking for an xForm that has been deleted, either by your own actions or by the HRP staff, you will need to contact your IRB administrator to recover that xForm. Some old xForm versions may not be recoverable.