

## HOW TO COPY A PROTOCOL IN IRB MANAGER

This short handout provides information on how to copy a protocol in IRB Manager. Copying a protocol or XForm is appropriate for duplicating a protocol when you want to use the same procedures and experiments on a different species or when you need to renew your current protocol. Let's look at the Dashboard after our investigator John PI has logged in.

The screenshot shows the IRB Manager dashboard for John M.D. at the University of Toledo. The dashboard is divided into several sections:

- Actions for Researchers:** Animal Use Protocol Form, Start xForm, Show Sponsor Ids.
- Recent Items:** 300018-UT, 400025-UT, 400030-UT, 400006-UT, 400001-UT, TEST-IACUC-3-UT, TEST-IACUC-2-UT.
- Useful Links:** All Projects Dashboard, IACUC Dashboard (coming soon), IBC Dashboard (coming soon).
- Studies (20 Active):** You are associated with 20 active Studies and 34 total Studies. You are the PI for 20 active and 34 total Studies. There are 8 studies expiring in the next 90 days. The next study to expire is 400004-UT.
- xForms (22 Active):** You have 8 unsubmitted xForms. You have 14 xForms being processed at a later stage. There are 3 xForms awaiting your attention.
- Events (15 Open):** Only show events where I am: [dropdown]. You have 2 IACUC Amendment Submission events. You have 13 IACUC New/Triennial Renewal Submission events. You have 15 Total Open events.
- Important Information:** Welcome to the new home of IACUC Research. IACUC research is open for testing and training. **IMPORTANT NOTE:** Do not put real Protocol applications here yet. All data entered will be wiped before the go-live on Monday February 24th at 5:00PM. For help with the transition or for question about a specific protocol, contact the IACUC office. For questions about the system email Jamie.Vannatta@utoledo.edu or call 419-530-6651.

Scroll to the bottom of the dashboard for a list of your currently active studies.

1. Open the study you are looking at copying by clicking the study # link.
2. Scroll to the section of the study labeled "Reference XForms"
3. Click on the Copy Action (which looks like a stack of papers) next to the IACUC Animal Use Protocol Form.

The screenshot shows the IRB Manager study details page for study 400004-UT (IACUC). The page displays the following information:


- Study-Site:** Site(s): UT - University of Toledo, PI: PI, John M.D., Status: Approved, Additional: N, Approval: November 20, 2019, Expiration: January 7, 2020, Initial Approval: November 20, 2019, Other Expirations: Standard 3-Yr Expiration Date (IACUC) - 01/06/2020.
- Location(s):** Comments:
- Study-Site Contacts (2):** A table with columns Name and Role. Contacts include CoInvestigator, Joe (Research Assistant) and Student, Jane (Research Assistant).
- Reference xForms (1):** A table with columns Action, Form, Identifier, Stage, As Of, Ref Active, and Inactivated. The table contains one row: Animal Use Protocol Form, Test reviewer worksheets - send DMR, Complete, 11/20/2019, 11/20/2019.
- Events (1):** A table with columns Event, Att, FE, Instance/UDF, Start, Complete, and Last Mtg. The table contains one row: IACUC New/Triennial Renewal Submission, 0, Test reviewer worksheets - send DMR, 11/20/2019, 11/20/2019, 11/20/2019.

A red circle highlights the 'Copy' icon (a stack of papers) next to the 'Animal Use Protocol Form' row in the Reference xForms table. The word 'Copy' is written in red text next to the icon.


4. You will then be given two options: Copy or Copy for Amendment. In this case, we are copying since this option allows you to copy the protocol.

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### Choose an Action

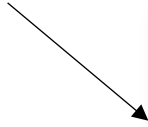
 **Copy**

Use this option if you want to RENEW this study or start a new protocol using this protocol as template. Most answers will copy into the new protocol.

 **Copy for Amendment**

Use this option if you want to AMEND the current study. You will use this mechanism to request changes to the study, such as requesting additional animals or changing 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 Personnel Amendment.

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5. This will give you an editable version of the protocol upon which to make any changes.
6. At the bottom of each page are directional buttons that allow you to move to the previous or next pages or sections, save the XForm for later, and a more button. If you press the more button you are given various options including the options to view the XForm as a pdf, which will allow you to print it for later use.

Yes  
 No

NextSave for LaterMore ▾