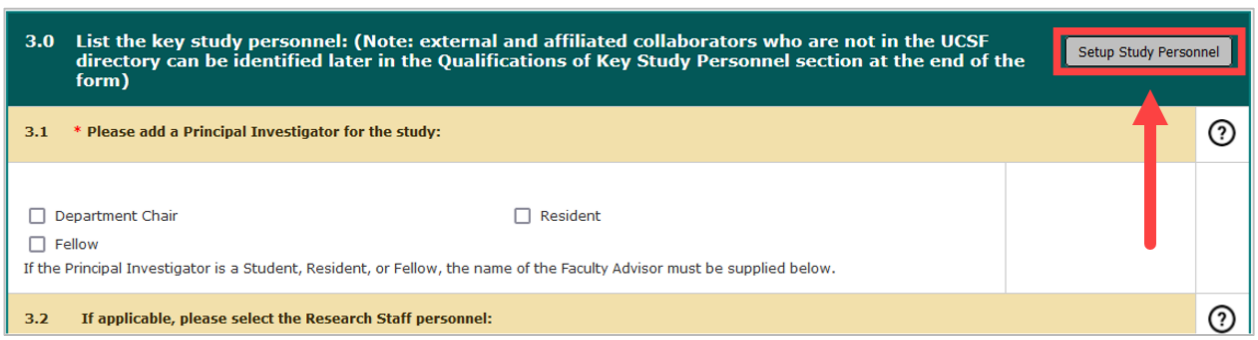
List Key Study Personnel on the IRB Application

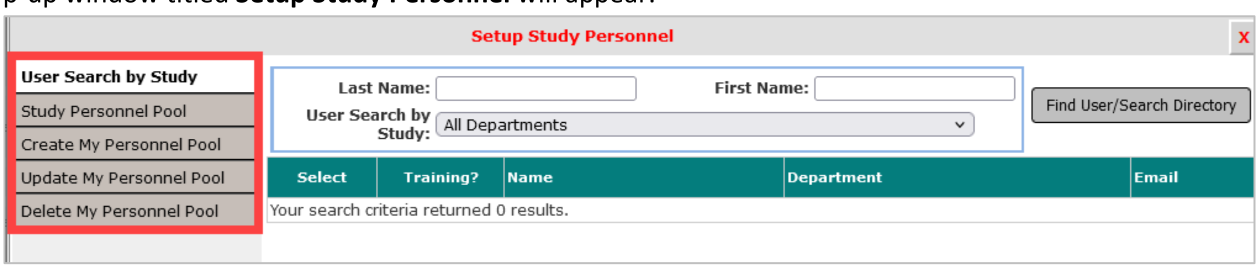
Contents

Introduction to "Setup Study Personnel"

As of April 2022, the only way to modify the Key Study Personnel section (3.0) of the IRB application is by clicking the new **Setup Study Personnel** button.



A pop-up window titled **Setup Study Personnel** will appear.



The gray menu items allow users to do the following:

- **User Search by Study:** Search for individual personnel to add to the application
- **Study Personnel Pool:** Add individuals from an existing pool
- **Create my Personnel Pool:** Create a new pool from the personnel listed on the application (Note: This tab only appears when there are personnel already listed in application section 3.0)
- **Update my Personnel Pool:** Replace an existing pool
- **Delete my Personnel Pool:** Delete an entire pool from your iRIS account (cannot recover once deleted)

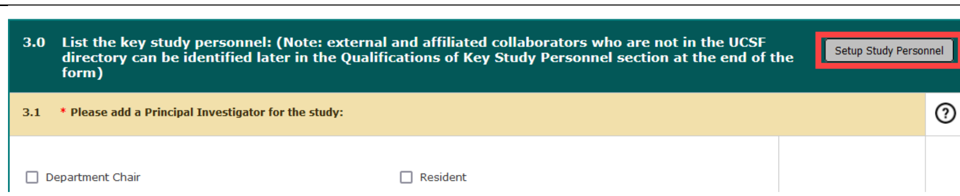
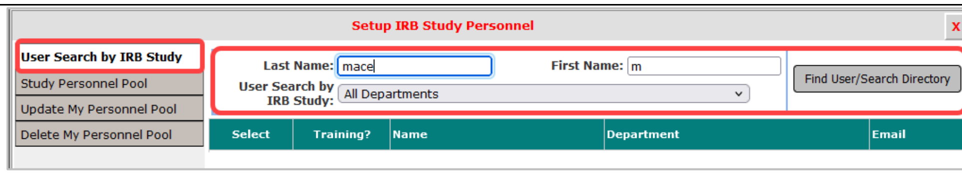
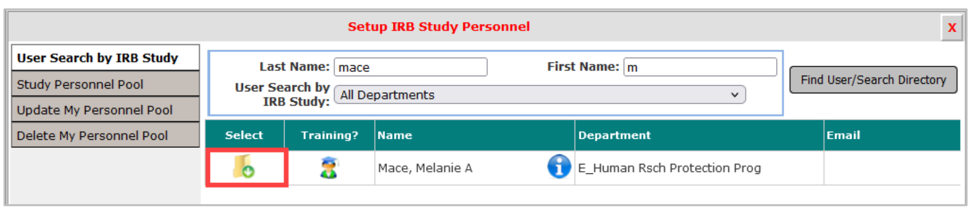
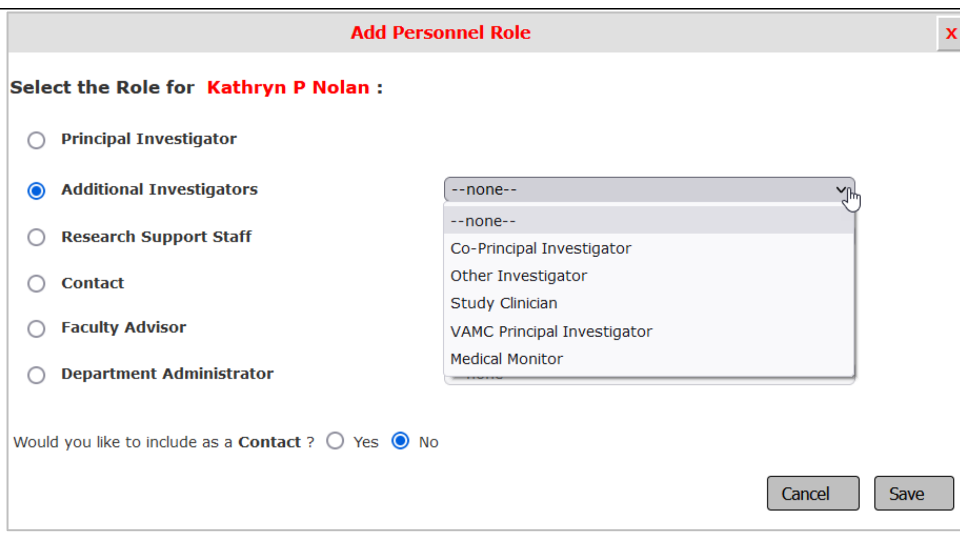
What is a Personnel Pool?

A personnel pool is a list of study team members— and their associated study roles— that can be created and saved by an iRIS user, and then be applied to other studies by that same iRIS user. Pools are a convenient feature to use when the same team of people will be on multiple studies together, as you can add the whole team to the application simultaneously rather than adding each person individually.

You are not required to create or use personnel pools. It is still possible to add, edit, and remove KSP without using the pools feature.

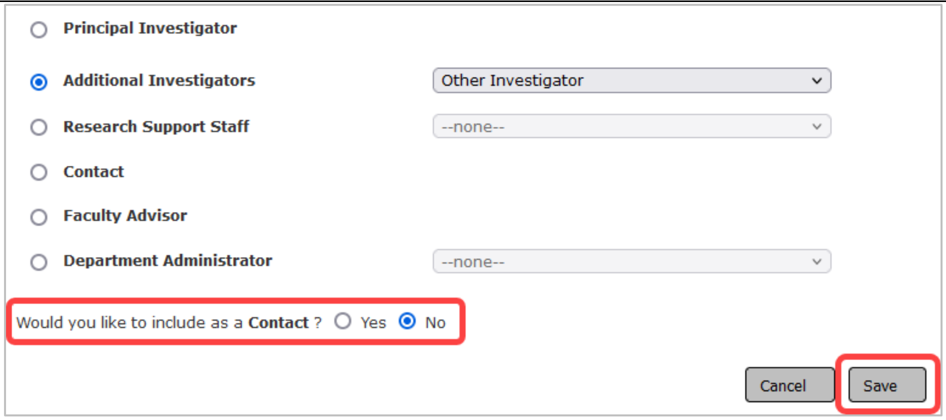
Add Personnel to the Application (Not using pools)

This is the standard way to add personnel to the IRB application.

In section 3.0 of the application, click the **Setup Study Personnel** button to open the **Setup Study Personnel** window.	
In the **User Search by Study** tab, search for each study team member by name. In the search results, click the **Select** icon to add an individual to the study.	 
A pop-up window titled **Add Personnel Role** will open. Select the role of this individual for this study. The roles of Additional Investigators, Research Support Staff, and Department Administrator require you to choose a more specific role from the corresponding drop-down menu.	

Once you select a role, indicate whether the individual should also be included as a study **Contact**. Those listed as contacts will be included on iRIS notifications about this study.

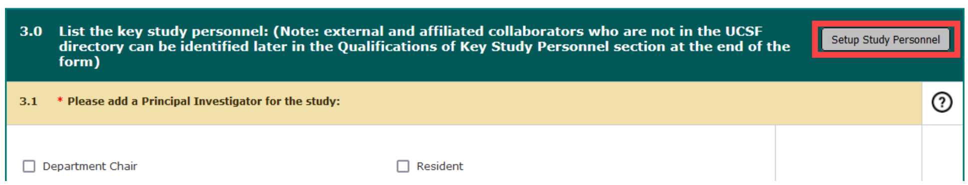
Click **Save**, then repeat the previous steps to add more personnel to the application.



Create a Personnel Pool from Scratch

Use this feature if there is a group of key study personnel that will be added to multiple applications. Otherwise, we suggest adding personnel to the application by following the above steps for "Add personnel to the application (Not using pools)."

In section 3.0 of the application, click the **Setup Study Personnel** button to open the **Setup Study Personnel** window.

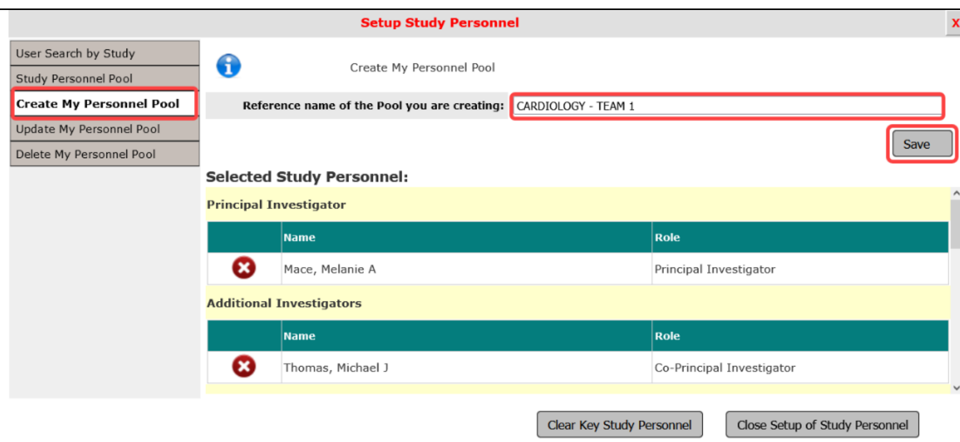


Add personnel to the application by following the above steps for "Add personnel to the application (Not using pools)."

Once all personnel are added, click the **Create My Personnel Pool** tab.

All personnel currently assigned to this study will be included in the pool.

Name the pool in the **Reference name of the Pool you are creating** field, then click **Save**.



In this example, all personnel in section 3.0 of this application have been saved in the "Cardiology- Team 1" pool. This pool can now be added—in whole or in part—to other applications. See the steps for "Add personnel to the application using personnel pools," below.

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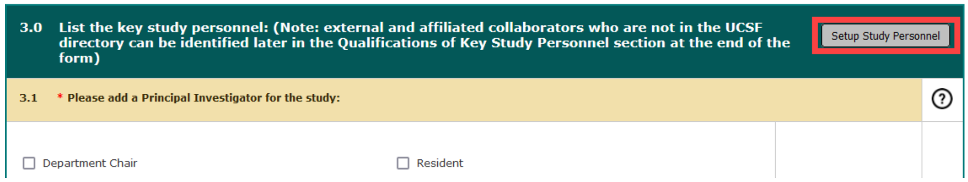
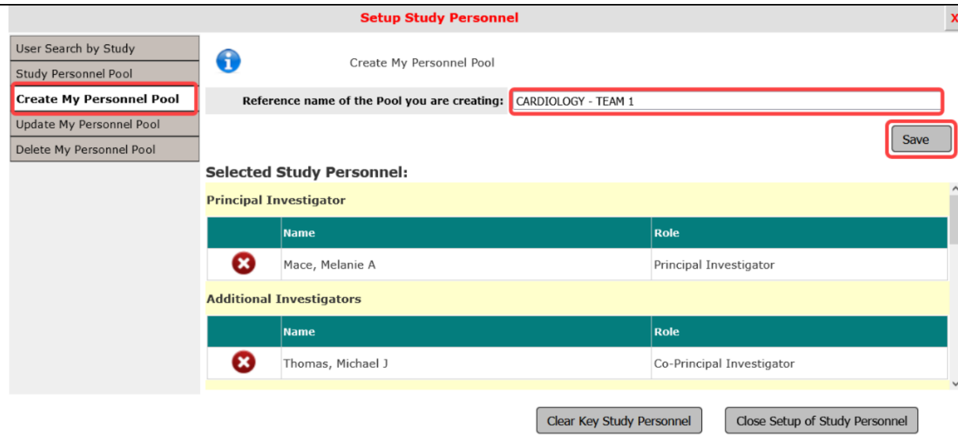
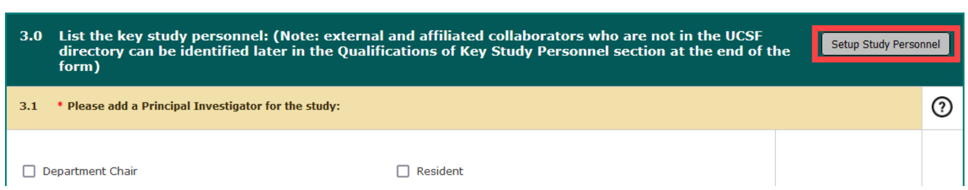
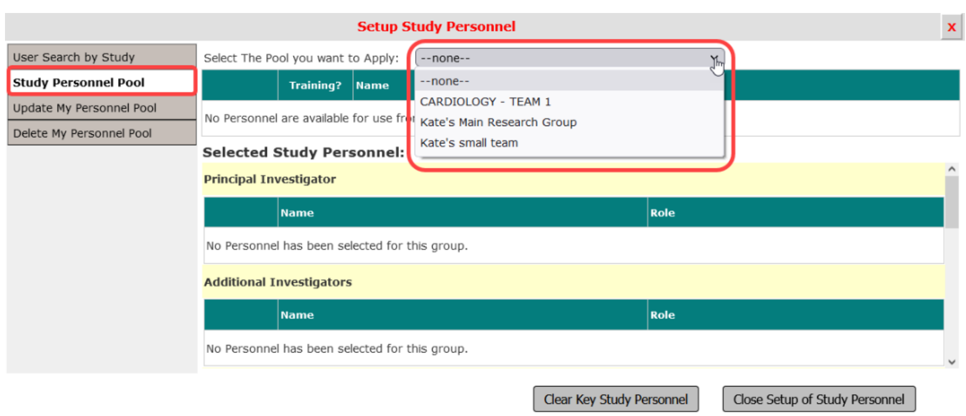
Create a Personnel Pool from an Existing Study

Use this feature if an existing study has a personnel list you want to copy and then apply to a different application.

Go to section 3.0 of the study that has a personnel list that you want to copy. Click the **Setup Study Personnel** button.	
Click the **Create My Personnel Pool** tab. All personnel currently assigned to this study will be included in the pool. Name the pool in the **Reference name of the Pool you are creating** field. Click **Save** and then close the application.	
Next, open the application for the study you want to apply this personnel list to. See the steps for "Add personnel to the application using personnel pools," below.	

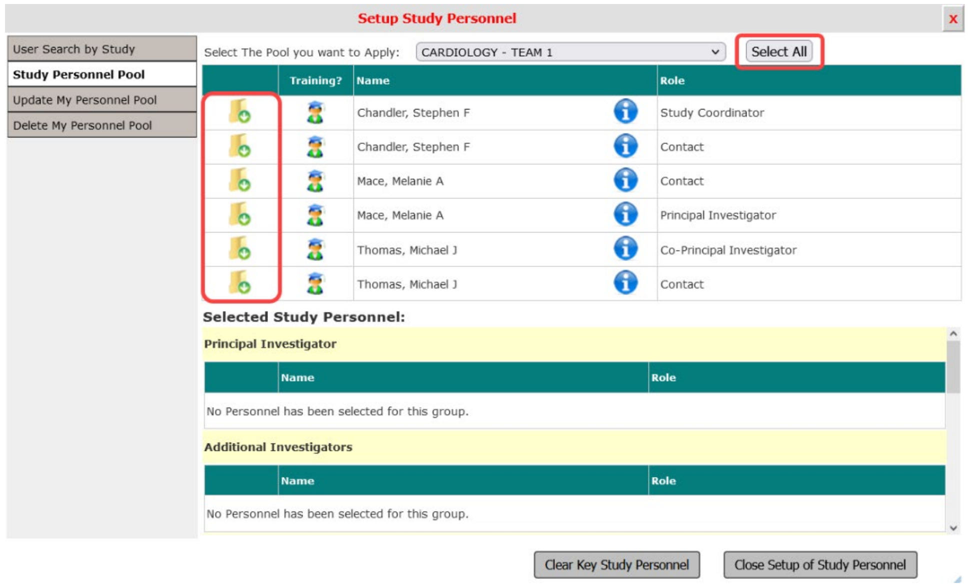
Add Personnel to the Application Using Personnel Pools

In section 3.0 of the application, click the **Setup Study Personnel** button to open the **Setup Study Personnel** window.	
On the **Study Personnel Pool** tab, you can select an existing pool from the drop-down menu.	

The names and roles of the KSP in the selected pool will appear. Names will appear twice for personnel who have been assigned multiple roles.

To add everyone from the pool to the application, click the **Select All** button.

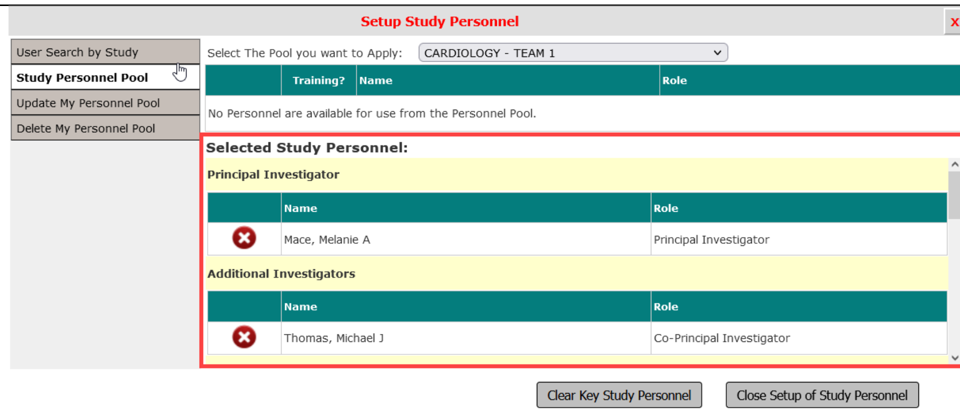
To add only certain people from the pool, click the **Select** icon next to the individual's name(s).



The selected individuals will appear in the **Selected Study Personnel** section of the window. They have now been added to section 3.0 of the application.

Now that the pool is added, you can do any of the following:

- Click **User Search by Study** to add more people to the study.
- Remove individuals by clicking the red **X** icon
- Click **Close Setup of Study Personnel** to return to the application



Notes:

- If a PI is already listed on the application, and the pool you've applied has a different PI, the existing PI will not be replaced. You can only add a new PI after first removing the existing PI from the application.
- Anyone who was already listed in section 3.0, they will still be there after adding a personnel pool. Adding a pool does not override any names already listed on the application (nor does it duplicate them).

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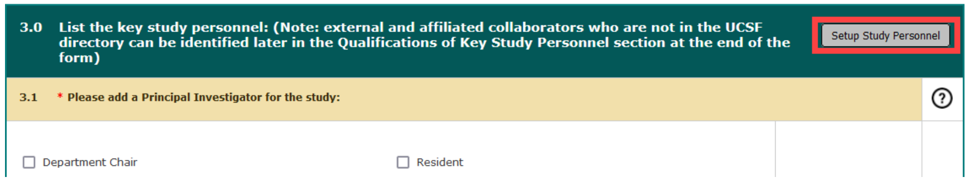
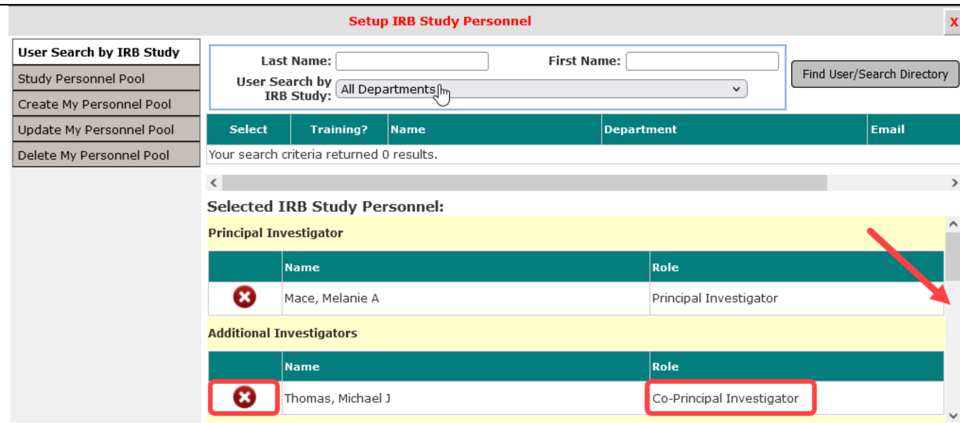
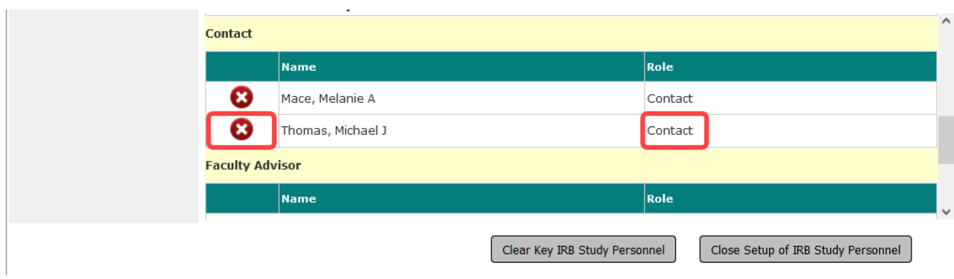
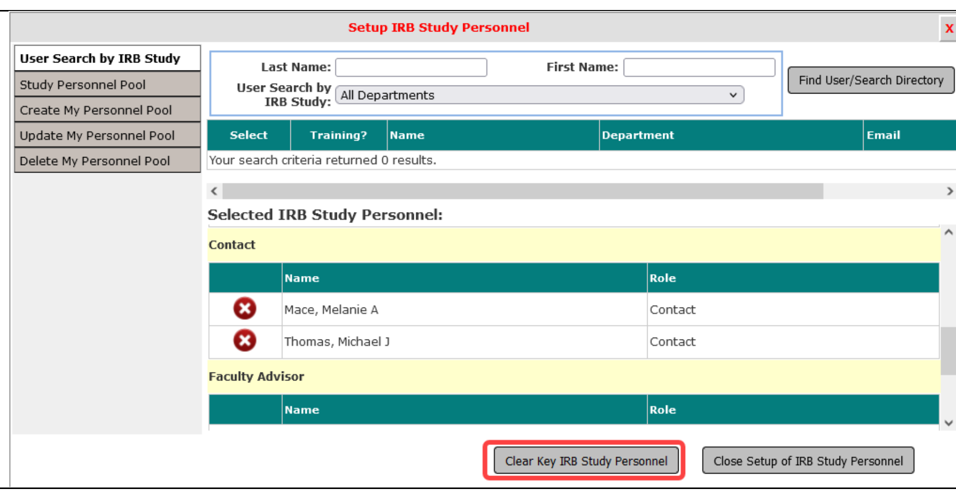
Remove Personnel from the Application

<table>
<tr>
<td>In section 3.0 of the application, click the Setup Study Personnel button to open the Setup Study Personnel window.</td>
<td>
</td>
</tr>
<tr>
<td>The User Search by IRB Study tab will list the individuals who are on the application. Click the red X icon to remove an individual from their role(s) on the study.

Use the scroll bar to see more personnel, and to view who is also listed in the Contacts section.

In this example, the Co-Principal Investigator is also listed as a Contact. The options for removal are:
Remove from Co-PI role and keep as contact (click X in the Co-PI row)
Keep as co-PI and remove as contact (click X in the contact row)
Remove from the study entirely (click X for both roles)</td>
<td>


</td>
</tr>
<tr>
<td>To remove <u>everyone</u> from the application, click Clear Key IRB Study Personnel.</td>
<td>
</td>
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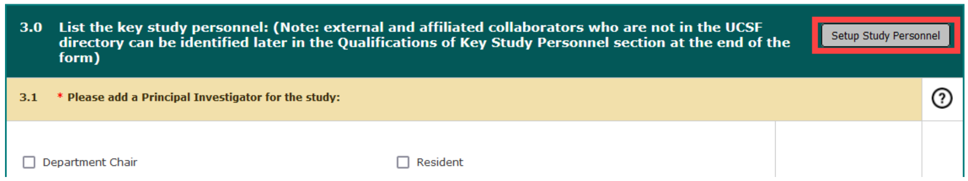
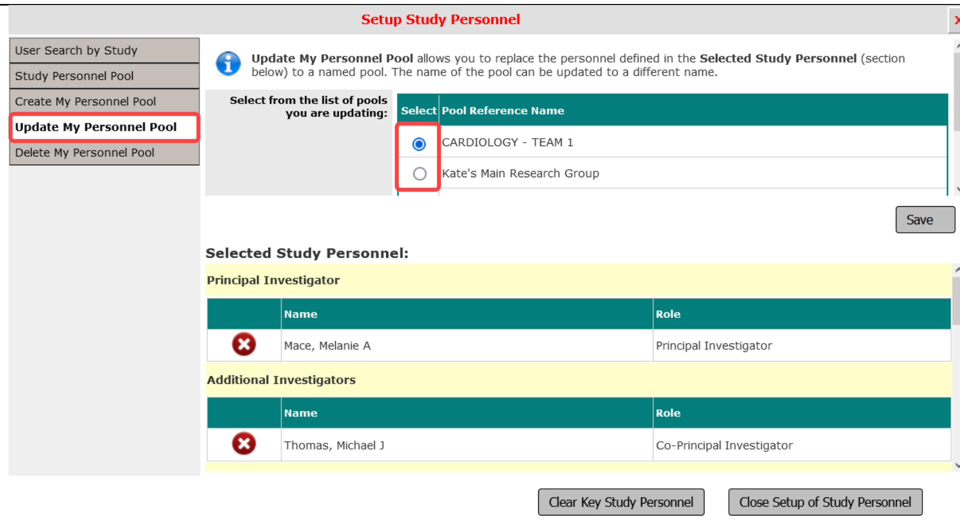
Update or Delete a Personnel Pool

In section 3.0 of the application, click the **Setup Study Personnel** button.	
Update a Pool To replace an existing pool with the list of personnel on a study, select the **Update my Personnel Pool** tab. Select the name of the pool that you would like to update. Clicking **Save** means that the pool named “Cardiology – Team 1” will be repopulated with the names and roles of personnel listed in the **Selected Study Personnel** section of this window.	
Delete a Pool To delete a pool entirely, select the **Delete my Personnel Pool** tab. Click the red **X** icon to delete a pool. This will permanently delete the pool.