

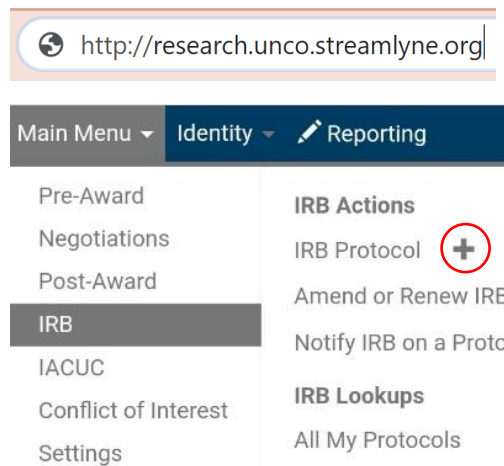
LINK TO CITI TRAINING: <https://www.unco.edu/research/research-integrity-and-compliance/institutional-review-board/irb-training-resources.aspx>



Comprehensive Tip Sheet

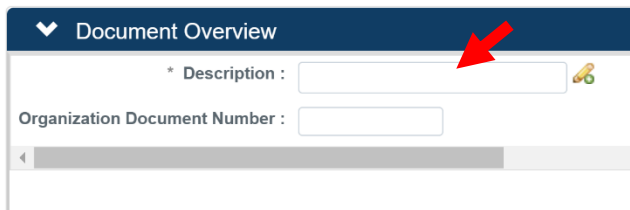
1) Go to <http://research.unco.streamlyne.org>

- **Username:** UNC Email
(ex. abcd1234@bears.unco.edu)
- **Password:** Network Password



2) Hover over: **Main Menu** → **IRB**
and click on the **+** next to **IRB Protocol**

3) Start in **Document Overview**
and add a short description about your project (i.e. Upper Division Honors project looking at...). You don't have to fill out anything else in this section.

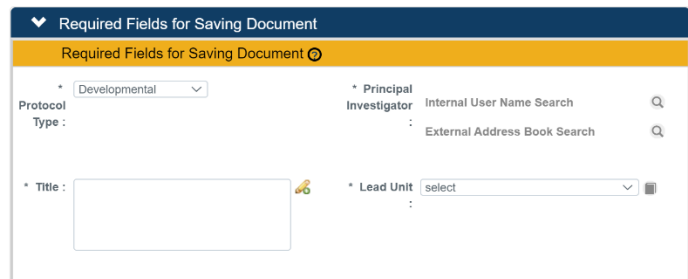



General Tip #1


Anything with a * next to it is **required**. This means that Streamlyne will not let you continue until you fill out the necessary sections.

4) Go to **Required Fields for Saving Document** and add the following information:



- **Protocol Type** (exempt, expedited, full board...)



- **Title**
- **Principal Investigator**
 - Click on the  next to **Internal User Name Search**
 - Enter your **last name, first name, OR both**
 - Hit **Search**
 - Click on **return value** next to your name
- This will automatically fill in the **Lead Unit**

* Principal Investigator Internal User Name Search 

Person Lookup

Person Id:  

Last Name:



First Name:



User Name:

Email Address:

Office Phone:

Active: Yes No Both

Home Unit:  

Campus Code:  

Return Value	Person	Full Name	User Name	Email Address	Directory Department	Directory Title (S2S)	Office Location	Office Phone
return value	11	Gabriela Masztalerz	gabriela.masztalerz	gabriela.masztalerz@unco.edu	34300			970-351-1907

One item found.

General Tip #2

Is your name not showing up? Email gabriela.masztalerz@unco.edu with the following information to get opted into the system:


- First Name
- Last Name
- Email
- Bear Number



No rows found with the current selection criteria.

Allow at least 24 hours for the system to update before trying again.

- 5) Go down to **Participant Types** and add the **type** and **number** of participants (if you are unsure, you can come back and change this later. Put an approximation for now)

Participant Types


Participant Types 

* Type  * Count 

Add:

Total Participants: 0

- 6) Hit **Save** at the bottom of the page and go into the **Personnel** tab

- Protocol
- Personnel** 
- Questionnaire
- Special Review
- Permissions
- Notes & Attachments
- Protocol Actions
- Streams

- 7) Click on the tab that says your name to expand it
- Hit **show** on the personal details tab
 - Change your **Affiliation Type** to **Student**

General Tip #3

As a student researcher, you must have a thesis advisor. Add them to your project under the **Protocol Personnel**:

- Make sure that **Internal User Name** is selected and hit the
- Enter their **last name, first name**, OR **both** (correct spelling is important!)
- Hit **Search**
- Click on **return value** next to their name
- Under **Add**, make sure to select **Faculty Advisor** and click the **Add** button
- Make sure to go into your thesis advisor's tab and change the **Affiliation Type** to **Faculty Advisor**

Follow the steps to add anyone else working on the project. **Everyone working on the project must be added to the personnel tab, even if they are not affiliated with the university**

- 8) Hit **Save** at the bottom of the page and go into the **Questionnaire** tab

16) Click on **New IRB Protocol (Incomplete)** to expand it

- ▶ IRB Screening Questionnaire (Optional) (Incomplete)
- ▶ **New IRB Protocol (Incomplete)**
- ▶ IRB Protocol Checklist (Optional) (Incomplete)



General Tip #4

Both the sections titled **IRB Screening Questionnaire** and **IRB Protocol Checklist** are optional. However, they're great tools for figuring out whether your project falls under expedited or exempt (see IRB Screening Questionnaire) and to keep track of what you need to attach (see IRB Protocol Checklist).

10) Click **yes** for the first question to begin the questionnaire

Exempt Projects

11) If your research falls under the EXEMPT category, click **yes** on the category (1-6) that describes your project best.

- **IMPORTANT:** select **no** for all other categories
- Select **no** for the following question: **Will your research include any procedures that do not fit into one of the six categories above?**
- Answer each question that follows. Remember to give detailed responses for each written question!
- For the very last question, answer **yes**

Expedited Projects

12) If your research falls under the EXPEDITED category, click **no** for every category question (1-6)

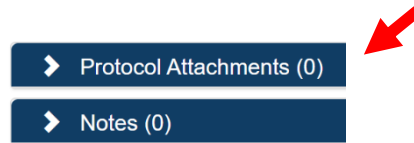
- Select **yes** for the following question: **Will your research include any procedures that do not fit into one of the six categories above?**
- Answer each question that follows. Remember to give detailed responses for each written question!
- For the very last question, answer **yes**

13) Hit **Save** at the bottom of the page and go into the **Notes & Attachments** tab

- Questionnaire
- Special Review
- Permissions
- Notes & Attachments**
- Protocol Actions

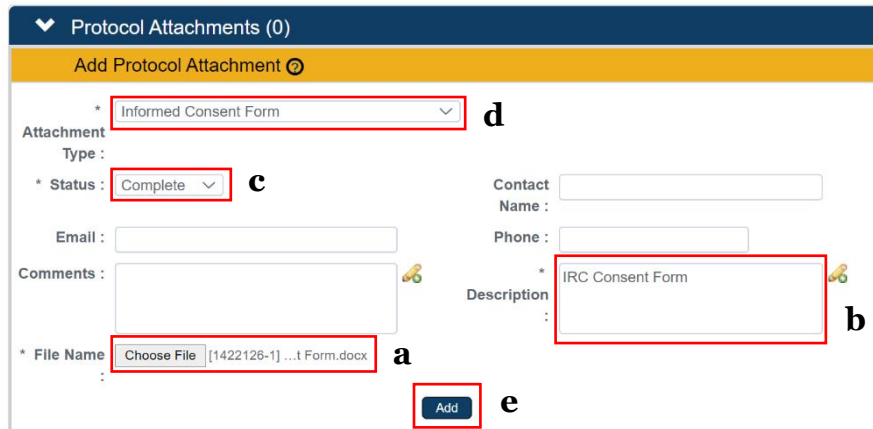


13) Click on **Protocol Attachments**
(o) to expand it



14) Add all relevant documents here.

- a) Click on **Choose File** next to **File Name**
- b) In the **Description** box, type the name of your file
- c) Select the **status** of your file as **complete**
- d) Select the appropriate **Attachment Type**
- e) Click **Add**
- f) Repeat for all files (see IRB Protocol Checklist for what you might need!)



General Tip #5

As a student researcher, you will probably only use the following attachment types:

- *Children’s Assent Form*—for participants under 18 years of age
- *Informed Consent Form*—for all participants over 18 years of age
- *Other*—for documents that don’t fit in any other category
- *Parental Consent Form*—for the parents of participants under 18 years of age
- *Permission Letter*—for any permission letters/letters of support
- *Recruitment Material*—for any flyers/promotional material
- *Survey/Interview*—for survey/interview questions

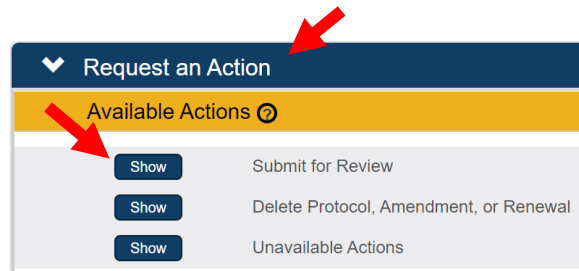
You do not need to upload a coversheet/narrative.

15) Hit **Save** at the bottom of the page and go into the **Protocol Actions** tab



16) Click on **Request an Action** to expand it

17) Under **Available Actions**, click on **Show** next to **Submit for Review**



18) Select the following information according to the type of project:

- Under **Submission Type**, select **Initial Protocol Submission**
- Under **Submission Review Type**, select either **Exempt** or **Expedited**
- Select the appropriate category (check with Loree/your thesis advisor if you are unsure what category your project falls under)

The image shows a form with a grey header containing a 'Hide' button and the text 'Submit for Review'. Below the header are several dropdown menus: '* Submission Type : Initial Protocol Submi', '* Submission Review Type : select', 'Type Qualifier : select', and 'Committee : select'. There is also a 'Schedule Date : select' dropdown and a 'Submit' button. Red boxes highlight the 'Submission Type' and 'Submission Review Type' dropdowns, with letters 'a' and 'b' next to them respectively.

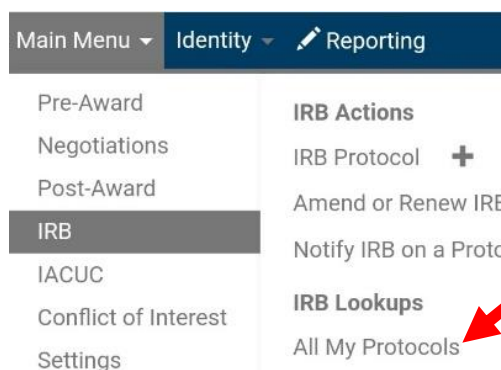
19) **IMPORTANT:** go back and double check all of the information in your Streamlyne protocol and make sure it's correct!

20) Hit **Save** at the bottom of the page and click **Submit**

The image shows a 'Submit' button and a 'Schedule Date : select' dropdown. The 'Submit' button is highlighted with a red box.

How to Find Submitted Protocols

- 1) On the homepage, hover over:
Main Menu → IRB and click on
All My Protocols under **IRB Lookups**



- 2) Enter the **Title**, **Investigator**, OR **Protocol Type** and hit **Search**.

The screenshot shows a search form with various input fields. On the left side, there are fields for 'Protocol #', 'Protocol Status', 'Title', 'Initial Submission Date From', 'Expiration Date From', 'Approval Date From', 'Last Approval Date From', 'Action Date From', 'Investigator', 'Area of Research', 'Performing Organization', and 'Unit Name'. On the right side, there are fields for 'Protocol Type', 'Reference ID1', 'Summary/Keywords', 'Initial Submission Date To', 'Expiration Date To', 'Approval Date To', 'Last Approval Date To', 'Action Date To', 'Key Person', 'Funding Source', 'Unit Number', and 'Active'. Below the search fields, there are radio buttons for 'Starts With', 'Contains', and 'Exact'. At the bottom, there are three buttons: 'Search', 'Clear', and 'Cancel'. A red box highlights the 'Search' button. Red arrows point to the 'Protocol Type' dropdown, the 'Title' field, and the 'Investigator' field.

- 3) Select **edit** to continue working on a project (**NOTE:** this action cannot be done once you have submitted a protocol for review), select **copy** to duplicate a project, or select **view** to go back and look at your project.

Actions	Protocol #	Protocol Type	Investigator
edit copy view	2005002611	Exempt	Gabriela Masztalerz

General Tip #6

Have any questions? Utilize the resources down below:

- **IRB FAQ:** <https://www.unco.edu/research/research-integrity-and-compliance/institutional-review-board/frequently-asked-questions.aspx>
- **Specific Questions:** email nicole.morse@unco.edu or gabriela.masztalerz@unco.edu