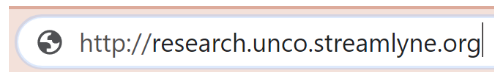
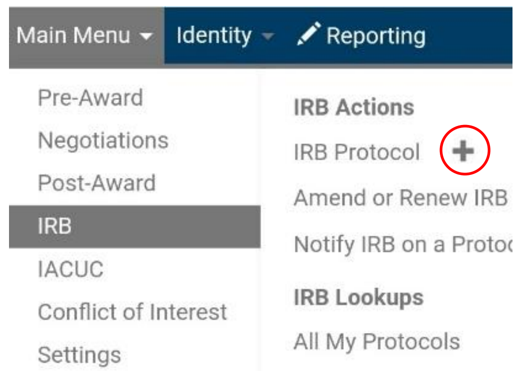
LINK TO CITI TRAINING: https://www.unco.edu/research/research-integrity-and-compliance/institutional-review-board/irb-training-resources.aspx

Comprehensive Tip Sheet

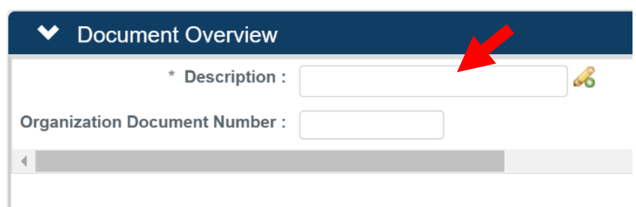
1) Go to **http://research.unco.streamlyne.org**
    - **Username:** UNC Email (ex. abcd1234@bears.unco.edu)
    - **Password:** Network Password



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



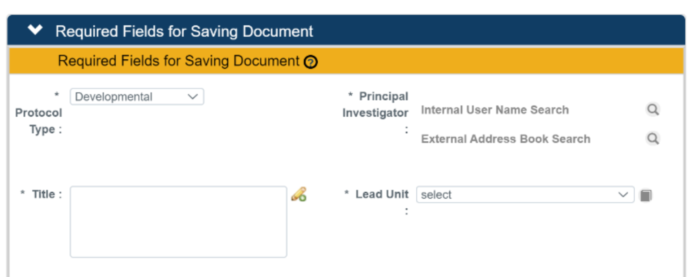
3) Start in **Document Overview** and add a short description about your project (i.e. Upper Division Honors project looking at…). You don't have to fill out anything else in this section.



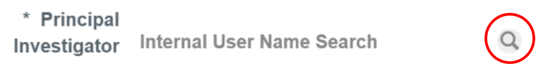
General Tip #1

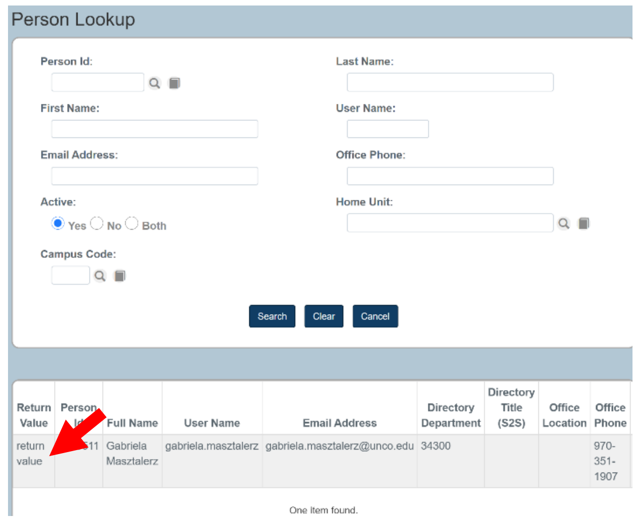
Anything with a ***** next to it is **required**. This means that Streamlyne will not let you continue until you fill out the necessary sections.

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**

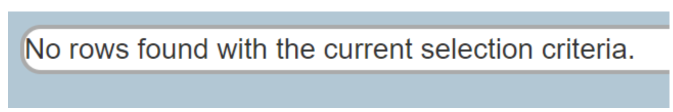




General Tip #2

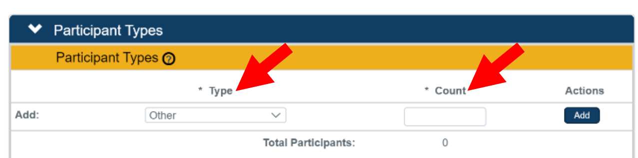
Is your name not showing up? Email gabriela.masztalerz@unco.edu with the following information to get opted into the system:

- First Name
- Last Name
- Email
- Bear Number

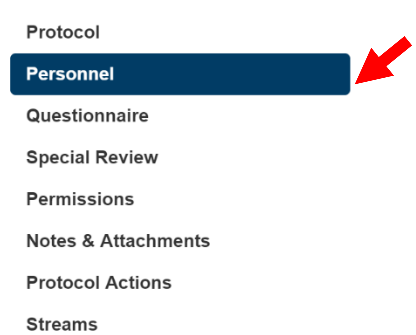


Allow at least 24 hours for the system to update before trying again.

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)

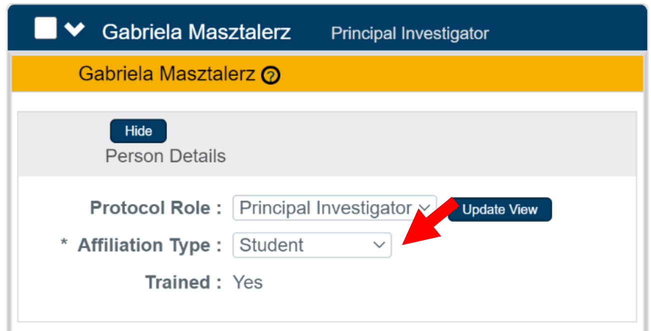


6) Hit **Save** at the bottom of the page and go into the **Personnel** tab



7) Click on the tab that says your name to expand it

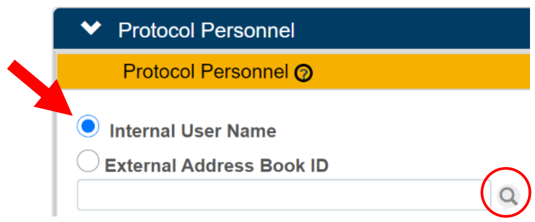
- Hit **show** on the personal details tab
- Change your **Affiliation Type** to **Student**

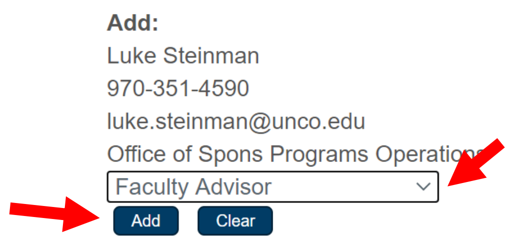


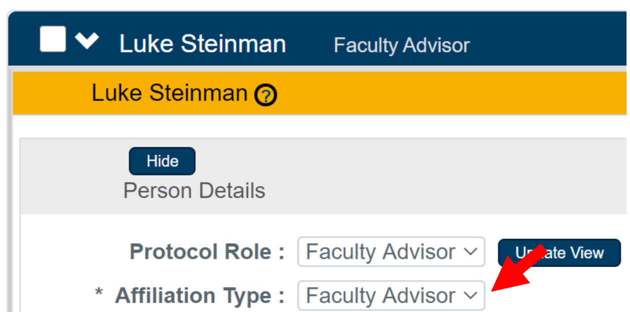
General Tip #3

As a student researcher, you <u>must</u> 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**

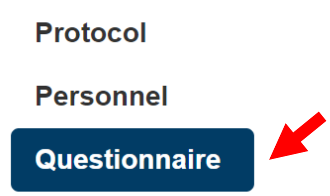




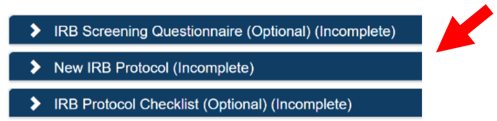


Follow the steps to add anyone else working on the project. **Everyone working on the project must be added to the personnel tab, even if they are not affiliated with the university**

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



General Tip #4

Both the sections titled **IRB Screening Questionnaire** and **IRB Protocol Checklist** are <u>optional</u>. However, they're great tools for figuring out whether your project falls under <u>expedited</u> or <u>exempt</u> (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**

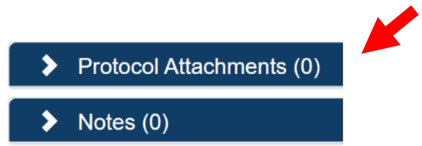
Expedited Projects

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**

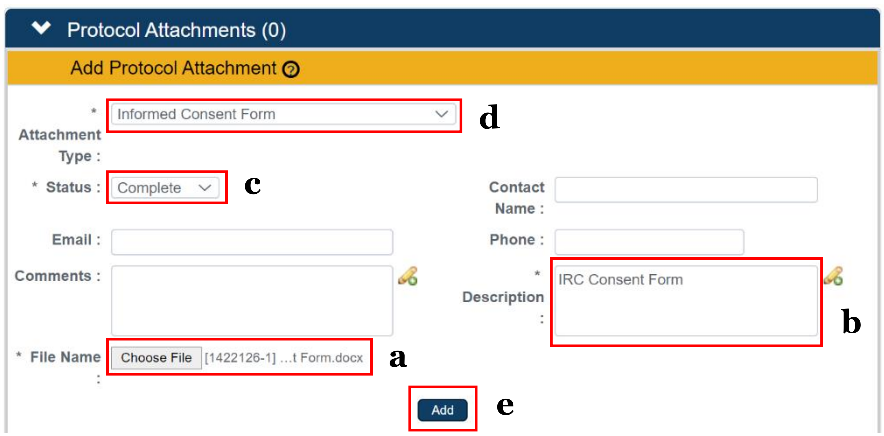
13) Hit **Save** at the bottom of the page and go into the **Notes & Attachments** tab

13) Click on **Protocol Attachments (0)** 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 <u>name of your file</u>
   c) Select the **status** of your file as **complete**
   d) Select the appropriate **Attachment Type**
   e) Click **Add**
   f) Repeat for all files (see <u>IRB Protocol Checklist</u> for what you might need!)



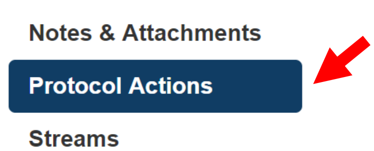
General Tip #5

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

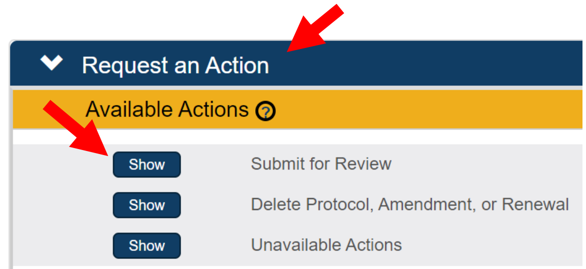
You <u>do not</u> need to upload a coversheet/narrative.

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**

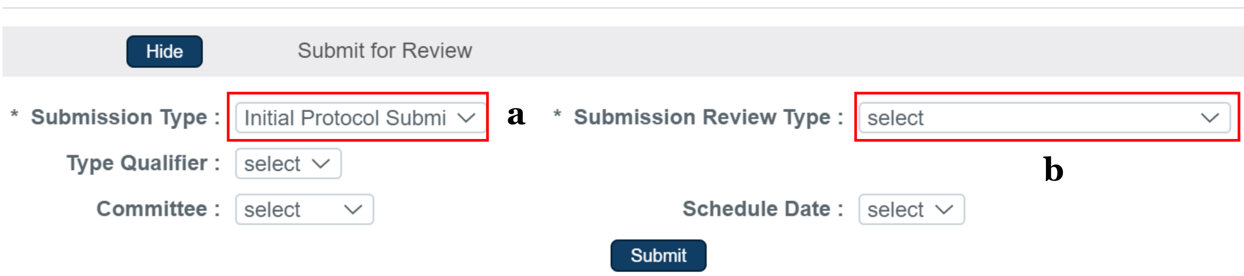


18) Select the following information according to the type of project:

a) Under **Submission Type**, select **Initial Protocol Submission**

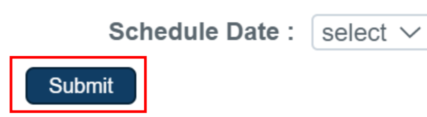
b) Under **Submission Review Type**, select either **Exempt** or **Expedited**

c) Select the appropriate category (check with Loree/your thesis advisor if you are unsure what category your project falls under)



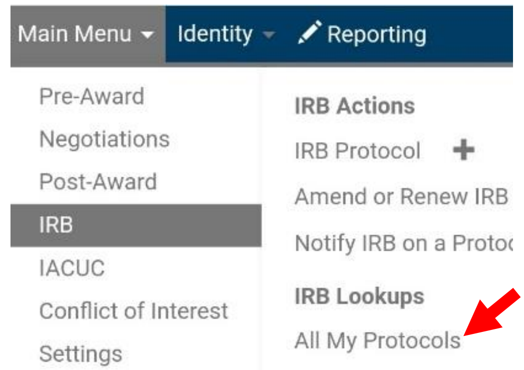
19) **IMPORTANT:** go back and double check all of the information in your Streamlyne protocol and make sure it's correct!

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

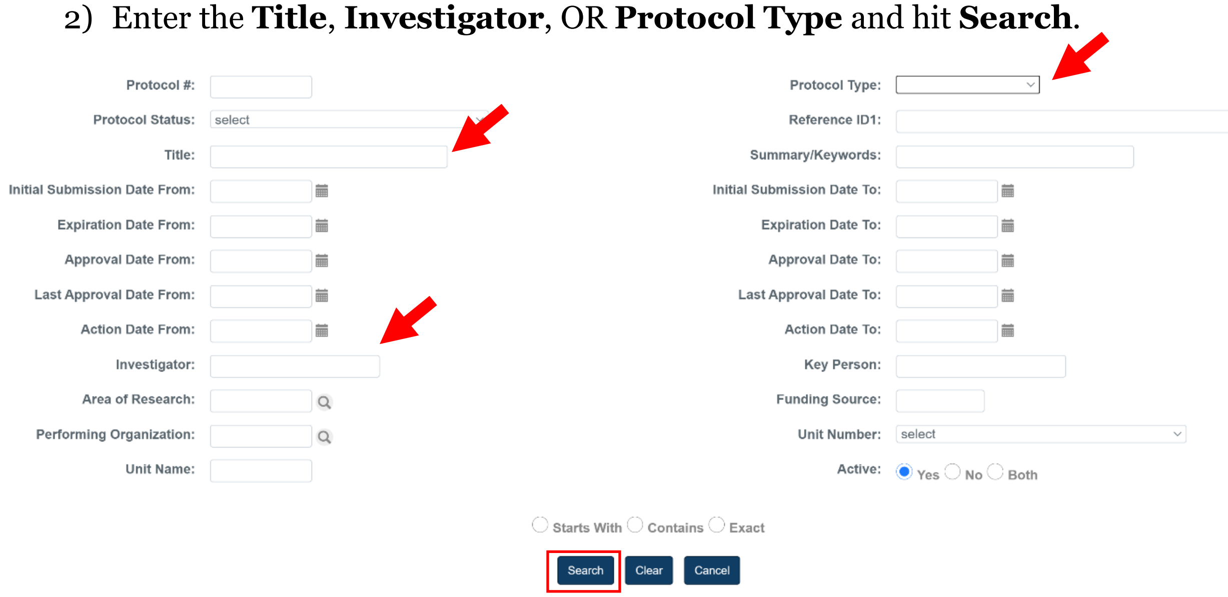


<u>How to Find Submitted Protocols</u>

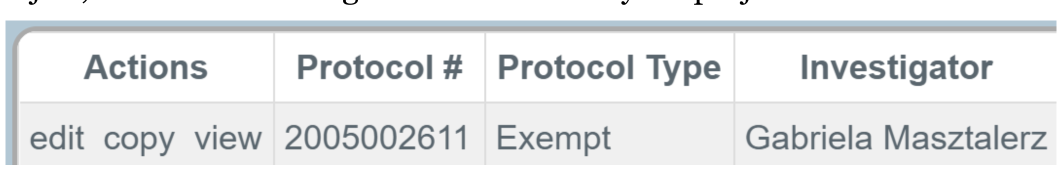
1) On the homepage, hover over: **Main Menu → IRB** and click on **All My Protocols** under **IRB Lookups**



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



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.



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