

IRB Submission Guide

V2. 5-12-26

- 1) Login to Streamlyne. Select the following drop down menus:
Main Menu / IRB / IRB Protocol + Create New

The screenshot shows the Streamlyne interface for the University of Northern Colorado. The user is logged in as mitchell.mcgloughlin. The navigation bar includes 'Main Menu', 'System Admin', 'Identity', 'Maintenance', and 'Reporting'. The 'Main Menu' dropdown is open, showing 'Pre-Award', 'Negotiations', 'Post-Award', and 'IRB'. The 'IRB' option is selected, opening a sub-menu with 'IRB Actions' and 'IRB Lookups'. Under 'IRB Actions', 'IRB Protocol' and 'IRB Committee' are listed, both with '+ Create new' buttons. The 'IRB Protocol' button is highlighted. The background shows an 'Action List' table with columns for Action, Id, and a list of actions including APP 5781, ACK 280733, COM 305584, ACK 361681, and ACK 373499. A table on the right shows Delegator, Date Created, Group Request, Actions, and Log.

Action	Id
APP	5781
ACK	280733
COM	305584
ACK	361681
ACK	373499

Delegator	Date Created	Group Request	Actions	Log
	06:10 PM 07/13/2020			
	12:39 PM 08/24/2023			
	10:14 AM 12/08/2023			
	06:01 PM 10/01/2024			
	08:43 PM			

I. Begin Data Entry into – Initial IRB Protocol Document - Protocol

This page will always open to the Protocol Section which has overarching details about your protocol. There are 5 fields that must be completed to save your protocol or move on to the next steps.

Initial IRB Protocol Document ?

☆ Bookmark this document

Document Number : 390332

Initiator: Last Updated : mitchell.mcgloughlin

Protocol # :

Document Status : Pending/In Progress

Submission Status :

Expiration Date :

Protocol

Personnel

Questionnaire

Special Review

Notes & Attachments

Protocol Actions

Permissions

Streams

Document Overview

* Description : McGlaughlin-IRB

Explanation :

Organization Document Number :

Required Fields for Saving Document

* Protocol Type : Exempt

* Principal Investigator :

Internal User Name Search

External Address Book Search

Mitchell Mcgloughlin

* Title : Example IRB submission

* Lead Unit : 3430 - Office of Sponsored Programs

Status & Dates

- Document Overview section
 - o Description – all documents to be saved require a description. Use your last name-IRB
No other fields in Document Overview are required but you are free to enter an explanation if you choose
- Required Fields for Saving Document
 - o Protocol Type – select from drop down choices
 - o Title – the title of your IRB supporting study
 - o Lead Unit – select your unit (generally your academic department) from the drop down choices
 - o Principal Investigator – Your name – to enter your name in the system click the magnifying glass next to ‘Internal User Name Search’. This will open a new window. Enter your ‘Last Name’ and click ‘Search’. Pick your name from the list at the bottom and click ‘Return Value’. This will enter your name and all details about your account and return you to the previous window.

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 Id	Full Name	User Name	Email Address	Directory Department	Directory Title (S2S)	Office Location	Office Phone	School	Active
return value	1244232	Mitchell McLaughlin	mitchell.mcgloughlin	mitchell.mcgloughlin@unco.edu	46700			970-351-2139		Yes

One item found.

After entering data into the required fields, click 'Save' at the bottom of the page. If you are missing any required fields an error message will appear at the top and bottom of the page, and the field with the error will have red symbol next to it.

Other Protocol Fields:

- Status & Dates – this will show your protocol number. All dates will be auto generated as your protocol moves through the process.
- Additional Information – we do not use this field
- Organizations – **this is required**. Generally this is UNC, a University: enter '000001', select 'Performing Organization' from the drop down list and then click 'Add'. If you have other types of organizations reach out to the IRB Administrator (not common).

Organizations ?

* Organization Id * Organization Type Contact Human Sub Assurance Actions

Add:

1	000001 University	1-Performing Organiza		FWA00000784	Delete Organization
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After clicking 'Add' your organization type will show below the Add line. If you have other types of organizations or multiple organizations reach out to the IRB Administrator (not common).

- Funding Sources – optional/not common. This can be used to connect your IRB to another document in Streamlyne, such as a submitted proposal. 4-2026 – we are not currently using this functionality.

- Participant Types – **this is required**. Select the type of participants from the drop down menu and then enter a numeric value under Count.

Participant Types		
Participant Types ?		
* Type	* Count	Actions
Add: Adults (18yr +)	10	Add
Total Participants:		0

Click 'Save' at the bottom of the page and check for error messages/missing fields.

II. Personnel

The Personnel section is where you list all individuals that are participating in data collection and analyses in your study. The system will automatically populate the person who is submitting the protocol (e.g. you) as the Principal Investigator.

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

Document was successfully saved.

* Indicates required field

Protocol Personnel
Protocol Personnel ?

☒ Internal User Name
☐ External Address Book ID

* Person	Unit	* Protocol Role
Add: select		

☒ Mitchell McLaughlin Principal Investigator

Delete Selected Save Reload Close

To add other users, check the 'Internal User Name' box and then click the magnifying glass. This will open the Person Lookup search, which is detailed above related in the Protocol section. If you need to add an external user (not common) reach out to the IRB Administrator.

Once you have returned a person to add, select the appropriate 'Protocol Role' and then click Add.

Protocol

Personnel

Questionnaire

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Protocol Personnel

Protocol Personnel ⓘ

☒ Internal User Name
☐ External Address Book ID

ashl1178

* Person	Unit	* Protocol Role
Add: Nathan Ashley ashl1178@bears.unco.edu	Schl of Biological Sciences Office	☒ select Co-Investigator Correspondent Administrator Faculty Advisor Principal Investigator Study Personnel

* Indicates required field

Next, you will click down arrow next to the name of personnel, and adjust their 'Person Details' and check their 'Training' and if necessary 'Attachments'.

IMPORTANT – All student submissions you MUST include a 'Faculty Advisor'. If you are a student and you do not include an advisor your protocol will be returned without review. If you have a Faculty Advisor, adding them is a two-step process. 1) add them as personnel with the 'Faculty Advisor' role as detailed above. 2) Open their Person Details and set their 'Affiliation Type' as 'Faculty Advisor'. In the Person Details section, both Protocol Role and Affiliation Type need to be Faculty Advisor for all student submissions. It is recommended that students only identify a single Faculty Advisor. If a student identifies more than one Faculty Advisor, each Advisor will need to approve the protocol, which can delay review.

Scott Franklin ⓘ

Protocol Role : Faculty Advisor

Affiliation Type
 ☒ select
 Faculty
 Faculty Advisor
 Non-Affiliate
 Non-Faculty
 Student

Training

Contact Information

Attachments

For all other personnel, select and appropriate 'Affiliation Type' under Person Details.

Once you have added all necessary personnel with affiliations, you need to check that they have the appropriate training logged in the system. Click 'Show Training'.

Mitchell McLaughlin Principal Investigator

Mitchell McLaughlin

Show Person Details

Hide Training

Training Details for : Mitchell McLaughlin

Description	Date Completed	Expiration Date
CITI, Responsible Conduct of Research, Biomedical & Life Sciences - RCR, Stage 1, 1	2024-02-06	2028-02-06
CITI, Responsible Conduct of Research, Responsible Conduct of Research for Physical Science, Stage 1, 1	2026-04-22	
CITI, Human Subjects Research, Social-Behavioral-Educational Researchers, Basic Course, 1	2026-04-26	2030-04-26
CITI, Human Subjects Research, IRB Chairs and Vice-Chairs, Basic Course, 1	2026-04-26	2029-04-26

Show Contact Information

Hide Attachments

Update Timestamp	Updated By	* Attachment Type	* Description	* File Name	Actions
Add:		Training Certificat		Choose File no file selected	Add

Show Unit Details

All Protocol Personnel must have appropriate CITI training. If a users e-mail is the same in Streamlyne and CITI, the trainings will automatically be listed. However, if trainings do not automatically populate, you can select 'Show Attachments' and add an appropriate training certificate. The required CITI trainings are:

Student – *CITI, Human Subjects Research, Students Conducting No More Than Minimal Risk Research, Basic Course, 1*

Faculty – *CITI, Human Subjects Research, Social-Behavioral-Educational Researchers, Basic Course, 1*

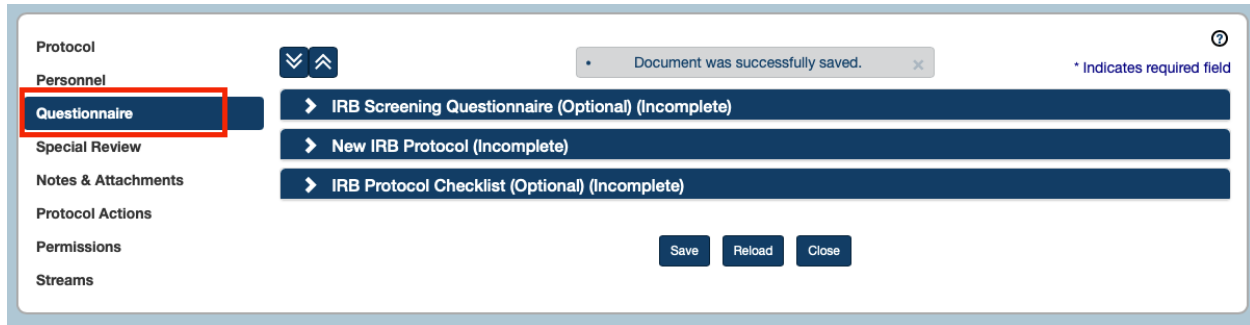
IMPORTANT – If all personnel do not have documentation of the appropriate CITI training, your protocol will be returned without review.

If needed, you can remove personnel by clicking the check box next to their name and then clicking 'Delete Selected' at the bottom of the page.

Once all personnel have been added, click 'Save' at the bottom of the page.

III. Questionnaire

The Questionnaire section is where you provide important details about what you will be doing with your human subjects research and what type of review is needed. There are 3 sub-sections, each detailed below.



The screenshot shows a web interface for managing IRB protocols. On the left is a sidebar with a list of menu items: Protocol, Personnel, Questionnaire, Special Review, Notes & Attachments, Protocol Actions, Permissions, and Streams. The 'Questionnaire' item is highlighted with a red rectangular box. The main content area on the right displays three sub-sections, each with a right-pointing arrow and the status '(Incomplete)': 'IRB Screening Questionnaire (Optional)', 'New IRB Protocol', and 'IRB Protocol Checklist (Optional)'. At the top of the main area, there is a notification bar that says 'Document was successfully saved.' and a help icon. At the bottom of the main area, there are three buttons: 'Save', 'Reload', and 'Close'. A legend at the top right indicates that an asterisk (*) denotes a required field.

1) IRB Screening Questionnaire

This part of the questionnaire is optional. It is gathering information about what type of research you are conducting and whether you need more guidance from Research Compliance staff.

2) New IRB Protocol

This part of the questionnaire as is the most important part of the submission. The first question is assessing whether a protocol qualifies for Exempt review. Most protocols submitted to the UNC IRB are exempt (>90%). If you select 'Yes' to the first question, additional options will appear asking for a Yes or No for each of the 6 categories that allow protocols to be exempt. Please review the statements associated with the 6 categories and select Yes or No as appropriate. You must answer every question.

After the 6 categories, there is a question: *Will your research include any procedures that do not fit into one of the six categories above?* If you answer Yes, multiple fields to enter details will become active. NOTE: Under almost all circumstances users should select Yes, and then provide additional details about the project in the fields that follow. If there are questions that do not relate to your research, you can enter 'Not Applicable'.

The final question of this section is where the PI is attesting to their responsibility for all aspects of the study. In order for a protocol to be reviewed, the PI must answer Yes.

3) IRB Protocol Checklist

This final section is to help PI's ensure that they have all appropriate documents and information prior to submitting their protocol. This section is optional.

IV. Special Review

We do not currently use this section.

V. Notes and Attachments

The Notes and Attachments section is where you will submit all of the supporting information to your protocol. To add documents click on 'Notes & Attachments' then the down arrow next 'Protocol Attachments'.

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

Protocol Attachments (0)
Add Protocol Attachment ⓘ

Attachment Type : Recruitment Materials
* Status : Complete
Email :
Comments :
* File Name : Choose File Example_R1...lan.docx
Add

Contact Name :
Phone :
* Description : Recruitment plan

* Indicates required field

In the 'Add Protocol Attachment' area you must complete:

- Attachment type – select the appropriate type from the list
- Status – is the document complete or incomplete
- Description – text description of what the document is
- File name – use this to select the file on your computer

When all fields are completed click Add.

Most submissions have many documents. Every protocol must have a minimum of 3 documents:

- Informed Consent Form
- Survey questions/survey tool
- Documents detailing the recruitment plan

All attached documents will show under the 'Attached Items' header.

▼
Protocol Attachments (3)

Add Protocol Attachment ?

* Attachment Type : select

* Status : select

Email :

Comments :

* File Name : Choose File no file selected

Contact Name :

Phone :

* Description :

Add

Attached Items ?

Show: select

Sort By: Attachment Type

Show	Informed Consent Form - Informed consent - Mcglaughlin, Mitchell (05/11/2026 02:58 PM)
Show	Recruitment Materials - Recruitment plan - Mcglaughlin, Mitchell (05/11/2026 02:57 PM)
Show	Survey/Interview - Survey - Mcglaughlin, Mitchell (05/11/2026 02:58 PM)

VI. Protocol Actions

The Protocol Actions section is where you can submit your protocol and see where it is in the review process. Three main field are important:

1) Request an Action

This is where you will submit your protocol. Select ‘Show Submit for Review’

Protocol

Personnel

Questionnaire

Special Review

Notes & Attachments

Protocol Actions

Permissions

Streams

Document was successfully saved.

* Indicates required field

Request an Action

Available Actions

Hide Submit for Review

* Submission Type : Initial Protocol Submission

* Submission Review Type : Exempt

Type Qualifier : select

Committee : UNC IRB

Schedule Date : select

Reviewers:

Michael Aldridge select

Silvia Correa-Torres select

Sonia Schaible Brandon select

Laura Martin select

Christopher Jenkins select

* Checklist (Exempt)

☒ Category 1 (2018): RESEARCH CONDUCTED IN EDUCATIONAL SETTINGS. Research, conducted in established or commonly accepted educational settings, that specifically involves normal educational practices that are not likely to adversely impact students' op...

☒ Category 2 (2018): EDUCATIONAL TESTS, SURVEYS, INTERVIEWS, OR OBSERVATIONS OF PUBLIC BEHAVIOR. Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedur...

☐ Category 3 (2018): BENIGN BEHAVIORAL INTERVENTIONS IN CONJUNCTION WITH THE COLLECTION OF INFORMATION FROM ADULT SUBJECTS through verbal or written responses (including data entry) or audiovisual recording if the subject prospectively agrees to the I...

☐ Category 4 (2018): SECONDARY RESEARCH USING IDENTIFIABLE DATA OR SPECIMENS. Secondary research for which consent is not required: Secondary research uses of identifiable private information or identifiable biospecimens, if at least one of the follow...

☐ Category 5 (2018): FEDERAL RESEARCH AND DEMONSTRATION PROJECTS. Research and demonstration projects that are conducted or supported by a Federal department or agency, or otherwise subject to the approval of department or agency heads (or the approva...

☒ Category 6 (2018): TASTE AND FOOD QUALITY EVALUATION and consumer acceptance studies: i) if wholesome foods without additive are consumed, or ii) If food is consumed that contains a food ingredient at or below the level and for a use found to be saf...

Submit

Show Delete Protocol, Amendment, or Renewal

Show Manage Notes (0)

Show Unavailable Actions

To submit your protocol you must complete the following field:

- Submission type – for new submissions the only option is ‘Initial Protocol Submission’
- Submission Review Type – most commonly Exempt, but there are other options
- Committee – UNC IRB
- Checklist – the options will change based on the Submission Review Type. They need to match what was indicated in the Questionnaire section.
- Do not select Reviewers or a Schedule Date. This will be handled by the IRB Administrator

Click ‘Submit’ when you have completed all fields. NOTE: Once you hit submit Streamlyne will check for errors on any of your submission pages. If there are no errors, or after you have fixed any errors that are found, your protocol will be submitted and your protocol document will close. The submission routing is different for different users:

- Faculty – once you submit the protocol it will be routed directly to the IRB Administrator to be assigned for review.
- Students – once you submit the protocol it be routed to your Faculty Advisor for approval. The protocol will not be routed to the IRB Administrator until all listed

Faculty Advisors have approved the Protocol. **NOTE: It is not uncommon for a protocol to sit in a faculty members approval queue for extended periods of time. If you are a student submitting a protocol you should contact your Faculty Advisor at time of submission to let them know that their approval is needed.**

2) Summary & History

The Summary & History section allows users to know where their protocol is in the approval process and to be able to access their formal IRB letter after approval.

Notes & Attachments

Protocol Actions

Permissions

Streams

Summary & History

Summary & History

Show Summary

Show Submission Details

Show Reviews and Attachments

Hide History

History

View Action Date Range: Beginning On [] Ending On [] Filter Clear

Description	Date	Action Date	Comments	Updated By	Update Time
Exemption Granted	04/08/2026 03:47 PM	04/08/2026	exemption granted	demitria.stitt	04/08/2026 03:47 PM
Hide Correspondences (1)					
Description	Date Created	Final	Actions		
Grant Exemption Notice	04/08/2026 03:47 PM	Yes (04/08/2026 03:47 PM)	View	Regenerate	Update
Show Notifications (1)					
Administrative Correction	04/08/2026 03:38 PM	04/08/2026	Adding documents	demitria.stitt	04/08/2026 03:38 PM
Show Notifications (1)					
Assigned to Agenda	03/31/2026 11:15 AM	03/31/2026	assign agenda	demitria.stitt	03/31/2026 11:15 AM
Show Notifications (3)					
Submitted to IRB	03/23/2026 03:25 PM	03/23/2026	Submitted to IRB	ash1178	03/23/2026 03:25 PM
Show Questionnaires (3)					
Protocol Created	03/23/2026 09:28 AM	03/23/2026	Protocol created	ash1178	03/23/2026 09:28 AM

Load Load selected node into Summary View, above

Click the down arrow next to Summary & History, then 'Show History'. This will open the history log which shows what actions were taken with a protocol on specific dates, starting with 'Submitted to IRB'. Once a protocol has been approved, under 'Exemption Granted' you can click 'Show Correspondences'. If you click 'View' on the 'Grant Exemption Notice' line, the formal IRB Protocol Letter will be downloaded to your computer.

3) Route Log

The Route Log will allow

VII. Permissions and Streams

We do not currently use this section.