This Energizer covers advanced submission topics for Researchers, Research Managers, and Research Coordinators. This Energizer illustrates how to:

- Advanced My Projects Management
- Manage My Reminders
- Review Project Messages & Alerts
- Create a Subsequent Package
- Add and Revise Documents
- Complete and Submit Subsequent Package
If you have forgotten to add a necessary document or need to make a quick change to a recently submitted project package, CONTACT YOUR LOCAL BOARD COORDINATOR.

Responses to board requests and normal actions in the project life cycle (reportable events, continuing reviews, adverse events, study team changes, investigator - and sponsor - initiated modifications, etc.) require the creation of subsequent packages in a project. CONTACT YOUR LOCAL BOARD COORDINATOR if you have questions.
Advanced My Projects Management

Using the Search field combined with the Search By Tag menu enables focused searching.

- Search Example: Find all Oncology Department projects with Dr. Smith as the PI (Search “Smith” + “Oncology Dept” tag)

- Click any Project Tag to search for all projects with that Tag.
Once the committee has rendered a decision you will receive an automatic e-mail notification. That notification can be found in My Reminders.

- Click My Reminders to view all active notifications sent to you concerning any of your projects.
- The flag indicates an active Reminder for this project.
Review My Reminders

All notifications sent to you across all of your projects will appear here. An e-mail will be sent to your registered e-mail address.

- Click the project title to go to the Project Overview page.
- Click action type to view message.
Silence Reminders

Reminders are indicated with red flags. Silencing the Reminders will remove them from this page in the future.

 ✓ Indicates an active Reminder. Clicking the red flag will “silence” the Reminder.
All project-specific notifications remain filed in the Messages & Alerts page as a permanent part of the project file.

- Click here to access project-specific Messages & Alerts.

- Grey flags indicate messages and alerts that are silenced, either because:
  - It was sent to another member of the team, or;
  - You have previously silenced the message.
You can easily revise your project by creating a new package. All versions of your project become a permanent part of your electronic project record.

- To create a new package from an existing package, click on "Project History."

Note that this is the first package in the sequence.

### Project Overview

**Title:** Motivations of Research Subjects: A Mixed Methods Study

- **Research Institution:** Zanzibar University, Frederick, MD
- **Principal Investigator:** Researcher, John, PhD
- **Keywords:** Incentive, Extra Credit
- **Sponsor:** National Research Foundation

The documents for this project can be accessed from the Designer.

### Project Status as of: 03/20/2013

<table>
<thead>
<tr>
<th>Reviewing Board</th>
<th>Board Ref #</th>
<th>Initial Approval Date</th>
<th>Project Status</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metropolitan IRB, Frederick, MD</td>
<td>09-497</td>
<td></td>
<td></td>
<td>04/03/2013</td>
</tr>
</tbody>
</table>

- **Package 137618-1 is: Locked**

<table>
<thead>
<tr>
<th>Submitted To</th>
<th>Submission Date</th>
<th>Submission Type</th>
<th>Board Ref #</th>
<th>Board Action</th>
<th>Effective Date</th>
<th>Shared with the following IRBNet users:</th>
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</thead>
<tbody>
<tr>
<td>Metropolitan IRB, Frederick, MD</td>
<td>09/30/2009</td>
<td>New Project</td>
<td>09-497</td>
<td>Modifications Required</td>
<td>10/05/2009</td>
<td>Chandry, Francis</td>
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<td>Palazzo, Enrico</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Researcher, John</td>
</tr>
</tbody>
</table>
Create a New Package

The Project History page displays all packages in this project. From here you can create a second package.

- Click “Create New Package.”
The new package has a status of Work in Progress and is editable.

Note that a second package is created.

The Project History lists all packages in the project lifecycle.

Now click on the Work in Progress to begin building the package.
Add or Revise Documents

Bring forward and revise documents previously submitted, or add a new document as required.

To revise an older document:
1. Download the previous version to your computer, modify as required and save.
2. Click on the pencil icon (see next page for more information).

To add a new document, click “Add New Document”.

All documents from previously submitted packages are listed here.
Attach a Document

Browse and locate the revised or new document on your computer, and attach by clicking the Update button.

- Browse your hard drive for documents, and attach.
- This view is for updating a document from package 1. The view for attaching a new document is similar.
IRBNet provides powerful tools to update and review project documents.

![Image of IRBNet interface]

- **View**
- **View revision history**
- **Update**
- **Delete document**

Note that after revising, the document is removed from the visible list of documents from previous packages.

**Documents from Previous Packages that you can Revise:**

<table>
<thead>
<tr>
<th>Pkg #</th>
<th>Document Type</th>
<th>Description</th>
<th>Last Modified</th>
<th>Pkg Submission Date</th>
<th>Pkg Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Application Form</td>
<td>IRB Application</td>
<td>09/30/2009 12:04 PM</td>
<td>09/30/2009</td>
<td>Modifications Required</td>
</tr>
</tbody>
</table>

Learn more about revising your existing project documents and maintaining version history, or adding entirely new documents to your package.
Revision History

The document revision history tool reveals all versions of a document type in the project.

The Document Revision History lists the most recent document and every previous version submitted by package.
When project documentation is completely assembled, sign and submit according to your institution’s SOPs.

- View T&C documents linked to any package within this project.
- Attach T&C documents to this package is necessary.
Your Committee Office can offer you assistance and training on IRBNet as well as advice on how to comply with important policies and standards as you use IRBNet.