

Getting Started with eProtocol

Log in with your Longwood credentials. Your account will be created and the Investigator dashboard will load.

Creating a protocol

The screenshot shows the 'Create Protocol' form. At the top, there are three buttons: 'Create Protocol', 'Clone Protocol', and 'Delete'. Below these is a breadcrumb trail: 'eProtocol » Investigator » Home » Create Protocol'. The form has a 'Study Title' input field, an 'IRB' section with a radio button for 'IRB Form', and a 'Create Protocol' button at the bottom.

- Click on “Create Protocol” on the right side of the dashboard.
- Enter the study title and check the “IRB Form” button. The form will load with your information as the PI or Lead Student Investigator. This information can be edited on the next page.
- Click “Create” and the protocol will load.
- If you are creating a template for class projects or your research you can use a generic template title here.
- You are able to change the title of the study later in the form.

Cloning a Protocol

The screenshot shows the 'Clone Protocol' form. At the top, there are three buttons: 'Create Protocol', 'Clone Protocol', and 'Delete'. Below these is a breadcrumb trail: 'eProtocol » Investigator » Home » Clone Protocol'. The form has a 'Study Title' input field, an 'IRB' section with a radio button for 'IRB Form', and a 'Clone Protocol' button at the bottom.

- Click on “Clone Protocol” on the right side of the investigator dashboard.

- A list of all the protocols in your account will appear (including protocols that have not been submitted, i.e. templates you have created).
- Check the protocol you wish to clone.

The screenshot shows a confirmation pop-up box. The title bar reads 'eProtocol - Longwood - Confirmation - Moz...'. The address bar shows 'https://longwood-uat.keyusa.net/confirm.do'. The main text asks 'Do you want to clone the selected Protocol?' and there are two buttons: 'Yes' and 'No'.

- A pop up box will ask if you want to clone the selected protocol. Select “yes” and the cloned protocol will appear at the top of your New Protocols in your Investigator Dashboard.
- This protocol will have the same title but a different protocol number.
- Click on the protocol to open it and begin editing.

Adding investigators

Investigator or Lead Student Investigator *



- Click on the Binocular Icon next to the Investigator name box

Find User	Find
User ID:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>

- Enter search information and click “Find”.
- Note that this function searches investigators who already have an account within the system.
- To create an account log in to the system with your Longwood credentials.
- CITI information will auto-populate.

Adding “Other Personnel” from Outside Longwood

Other Personnel

“Other Personnel” are collaborators from other

Name of Other Personnel

Em



- Use the “Other Personnel” box.
- Click on the Binocular icon next to the Name of Other Personnel box.

Find User	Find
User ID:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>

[Click here to add Other Personnel, if you are sure the User ID does not exist for the person.](#)

- Click the link “Click here to add Other Personnel, if you are sure the User ID does not exist for the person.”

Other Personnel

“Other Personnel” are collaborators from other insti

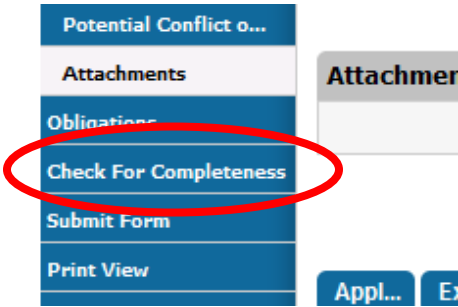
Name of Other Personnel

Email *

- The “Name” box becomes fillable and you can enter the name of your collaborating investigator.

- Note that the CITI integration is only for those in the Longwood database. If Longwood IRB is the IRB of record, please upload a copy of the individual’s CITI certification in the attachments section.

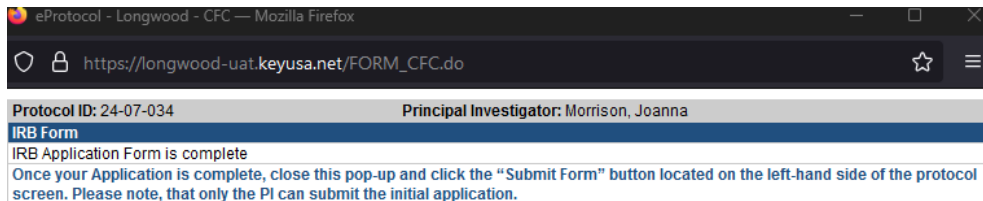
Check for Completeness



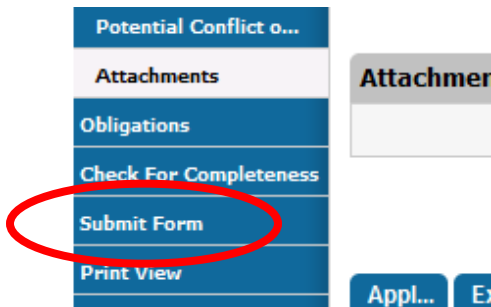
- When you have completed the form, click the “Check for Completeness” button on the left-hand side of the protocol screen.

IRB Form	
S.No.	Resolution
1	Summary - Complete the Section 1(a).
2	Purpose - Complete the Section 2(a) an
3	Procedures - Complete Sections 3(a) th
4	Background and additional procedures -
5	Subject Population - Complete Sections
6	Subject Population - Complete Sections
7	Recruitment Process - Complete Sectio
8	Subject Compensation and Costs - Sele
9	Risks - Complete Sections 8(a) through
10	Benefits - Complete Sections 9(a) throu
11	Procedure to maintain Confidentiality - S
12	Consent Information - Add at least one c
13	Obligations - Please select the checkbo

- The system will find where you have missing information.
- Click the link in the list to be taken directly to the page in the form.
- Continue to click “Check for Completeness” until the system indicates you are ready to submit.



- When you have completed the form the “check for Completeness” function will indicate that the form is complete and ready to submit.



- Submit your form by clicking the “Submit Form” button on the left-hand side of the protocol screen.

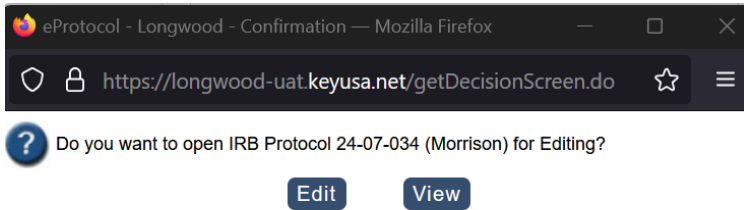
Protocol Event	Status/Comments
Yet to Submit to IRB	NEW
Yet to Submit to IRB	NEW
Yet to Submit to IRB	NEW
SUBMITTED TO IRB	SUBMITTED
SUBMITTED TO IRB	SUBMITTED

- When you have submitted the protocol the protocol status will change to “Submitted.”

Protocol Event	Status/Comments
Comments Sent (Cycle 1)	IN-PROGRESS
Receipt of Protocol	• IN-PROGRESS
Comments Sent (Cycle 1)	IN-PROGRESS
Reviewer(s) Assigned	IN-PROGRESS
Receipt of Protocol	PANEL ASSIGNED

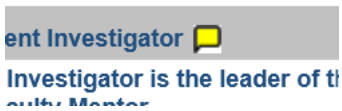
- The “Protocol Event” column provides information about the stage of review and will change as your protocol progresses through review.

Editing Protocols



- To edit a protocol, click on the protocol number and select “Edit” from the pop up box.

Comments Sent



- Section specific comments are indicated by the yellow box next to the section.

Printing a Protocol

Potential Conflict o...

Attachments

Obligations

Check For Completeness

Submit Form

Print View

Attachmer

Appl... E

- Click on “Print View” on the left-hand side of the protocol screen,

Print View OK

Please select any one of the following:

Protocol Only
 Protocol with Comments
 Comments only

Sections to Print	Select Orientation	
	Portrait	Landscape
<input checked="" type="checkbox"/> All		
<input checked="" type="checkbox"/> Personnel Information	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Subject Checklist	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Study Location	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> General Checklist	<input checked="" type="radio"/>	<input type="radio"/>

- Select the options and sections you want to print and the system will create a PDF.
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