IRBMANAGER – USER GUIDE

Los Angeles County Dept. of Public Health

Institutional Review Board

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You can navigate directly to a section by clicking on the links below (press Ctrl + Click link).

Visit our "IRBManager" webpage at the link below to view tutorial videos that show some of the basic IRBManager functions described in this user guide:

http://www.publichealth.lacounty.gov/IRB/irbmanager.htm

Revised: July 2025

Overview of IRBManager application process

Start new application → **Data Entry**

Application submitted → **PI signature**

- Changes can only be made to an application during the **Data Entry** stage

PI signature → **Co-PI signature⁺**

Co-PI signature⁺ → **DPH/DHS liaison signature⁺**

⁺Not required for all projects

DPH/DHS liaison signature⁺ → **Division Director Signature**

Division Director Signature → **Screening for Completeness**

Screening for Completeness → **IRB Review***

IRB Review* → **Approval**

Approval → Project activities can begin

- During the **Screening for Completeness** stage, IRB staff check the application to make sure it is complete. If IRB staff identify any issues during this stage (e.g., documents containing internal comments, expired training certifications, etc.), the application is returned to the **Data Entry** stage so that the submitter can make the necessary changes.

- Once the requested changes have been addressed and the application is re-submitted, it goes through the signature stages again until it returns to the **Screening for Completeness** stage where it is checked again. This process can happen multiple times before the application is ready to move to the Review stage.

*In the **IRB Review** stage, the project undergoes an ethical/regulatory review to ensure the project meets federal regulations and DPH IRB policies. If any aspects of the application require clarification and/or modification ("stipulations"), the application will be returned to the **Data Entry** stage so that stipulations can be addressed. The application must then be re-submitted through the IRBManager system for review and approval.

(Rev. April 16, 2025)

Section 1: Accessing IRBManager

➢ Please click on the link below (Press CTRL + click) to open the IRBManager login page.

IRBManager login link*: https://lacdph.my.irbmanager.com/

New Users

➢ If this is your first time accessing IRBmanager and you are an LA County employee, please log in using your County email address and password.

➢ If you are not an LA County employee, you will need to register for a new account (unless an account was created for you by someone else; refer to the "Existing Users" section below for more information). To complete the registration process, click the link that says *Click here to register*, then enter a user name (use an email address that you check regularly) and password on the pages that follow.

Existing Users

➢ **If an account was created for you** (either by IRB staff or by one of your colleagues working on an application), you do <u>not</u> need to complete the new user registration process again. You will receive an email notification when someone has created an account for you. Proceed to the login page using the link in the email and enter your email address as your user name; make sure the email matches the email that was used to create your contact. You will be prompted to create a password.

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➢ **If you already have an account**, navigate to the login page and enter your user name. On the next screen, if you are a County employee, you will be prompted to re-enter your County email address and then your County password in order to log in. If you are not a County employee, you will be prompted to enter your password after entering your user name the first time.

Please contact IRB@ph.lacounty.gov if you have any trouble logging in to IRB Manager. If possible, please include screenshots of any error messages to help IRB staff troubleshoot the issue.

Section 2: Navigating Your Dashboard

➢ Once you have successfully logged in, you will be automatically taken to your dashboard. Your dashboard may appear slightly different than the image below, but the basic functions noted throughout this guide will be available.
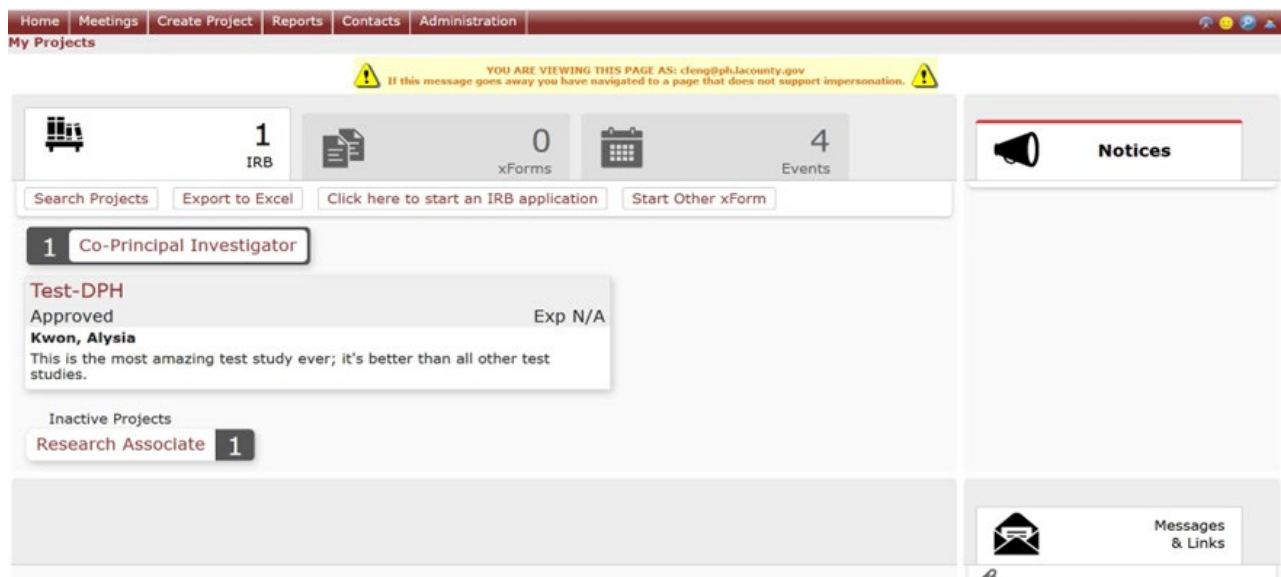
➢ From the dashboard, you can access any IRB projects you are associated with (i.e., listed as PI, Co-PI, Division Chief/Program Manager, DPH/DHS liaison, program coordinator, point of contact, and/or key personnel). You can also start a new IRB application (see Section 3), start an amendment application for requesting changes to approved projects, and/or submit reports such as continuing review requests, annual progress reports, final reports, and adverse event reports (see Section 6 for assistance with submitting amendment applications and reports).

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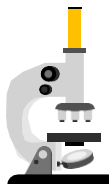
Let's take a closer look at the features available on your Dashboard.

> From the **IRB** tab you can view your approved projects (active and inactive/closed projects). Click on the IRB # of a particular project to open the project details page (see the image below).

> The **xForms** tab lets you view any applications in progress. You can view applications that have already been submitted (but not yet approved) as well as applications that have been started but not submitted.

"xForm" refers to any form (i.e., new application, amendment application, annual progress report, create new contact form, etc.) that can be completed in the IRBManager system. For our purposes, the terms "xForm" and "application" can be used interchangeably.

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➤ The **Events** tab lets you view any items that require your attention such as progress report/Annual Continuing Review due dates or expiration dates for studies whose approval period is coming to an end.

➤ The tiles indicated in the screenshot below are filters that allow you to view certain projects depending on the filter. Different filter tiles will be available depending on the tab that is selected. In the image below, the IRB tab is selected and the filter tiles let you filter your projects by your role (i.e., Co-Investigator, etc.).

➢ The buttons indicated in the image below allow you to complete various tasks directly from the dashboard. However, if you would like to submit an application for an already approved project, you will not be able to do so using these buttons. You will need to open the project details page for that particular project and start an application from there (see Section 6).
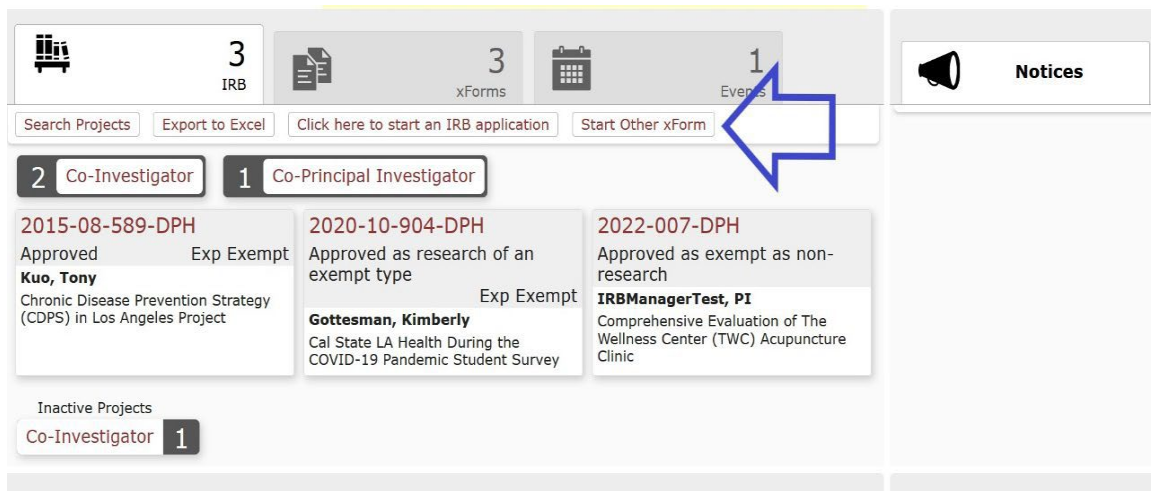
➢ The "Export to Excel" function will generate an Excel spreadsheet that displays your projects and their associated project details.

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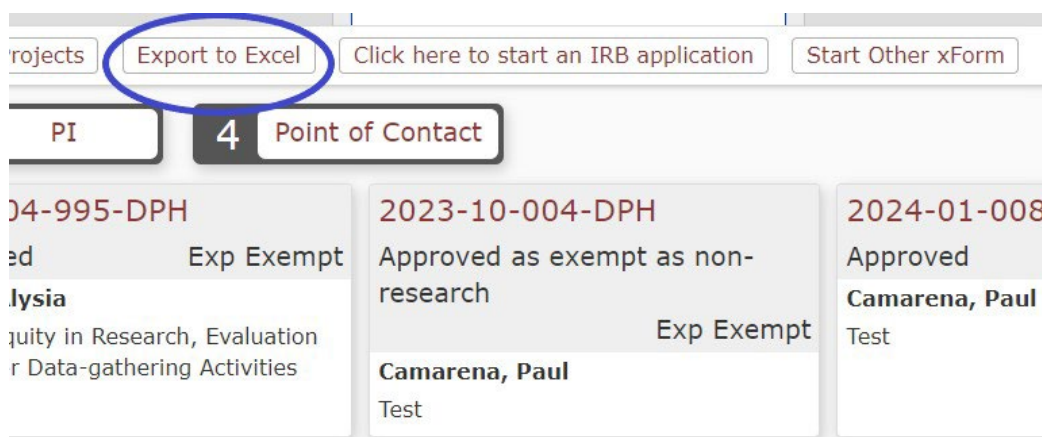
SECTION 3. SUBMITTING A NEW IRB APPLICATION

➢ If you would like to start a new **IRB Application**, make sure the IRB tab is selected on your dashboard and click on the button that says "Click here to start an IRB application" (see the image below).

➢ A blank IRB application will open in a new window. Please enter the required information and upload supporting documents in the spaces provided. Refer to the new application checklist available on the IRB's website (click here) for more details about requirements for a complete application.

➢ Please ensure that supporting files are labeled in a way that makes them easily identifiable and that they are uploaded in the appropriate sections of the application.

➢ Please delete any files that are no longer current or relevant. You can delete existing attachments by clicking on the red "X" next to the attachment.

Some questions require a response and you will not be able to navigate to the next page using the Next button (bottom of the page) without providing an answer to the required question(s). If you would like to navigate between the different pages of the application without answering all required questions on a particular page, use the dropdown menu at the top of the page (see the screenshot below).

➢ Using the dropdown menu will allow you to select the specific page of the application you would like to open. Any information you have entered on the application will be saved when navigating between the pages using the dropdown menu.

➢ If you would like to save the application and continue working on it at a later time, click on the "Save for Later" button at the bottom of the page.

➢ If you would like to download your application as a PDF, click on the "More" button at the bottom of the page and select "View as PDF" – a PDF file will begin to download.

➢ When you have answered all required questions and are ready to submit the application, click "Next" on the last page of the application.

➢ Then click "Submit" on the following screen to successfully submit the application.

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SECTION 4. CREATING A NEW CONTACT

➢ Each person must have a contact in the IRBManager system before they can be added to an application. You can create a contact in two ways: from your dashboard when you first log in, or by clicking on the "Start new contact form" button directly from an open application.

To create a contact from your dashboard

➢ Click on "Start xForm" (make sure the *xForms* tab is selected) and you will be taken to the screen shown below. Click on "Create new contact" to open the *new contact details* page.

Select xForm to start

Action	Form (Click to start) ▾	Description
🖶	Create new contact	Create new contact
🖶	IRB Application	IRB Application

➢ Enter the required information and click "Next" at the bottom of the contact details page to complete the new contact creation.

Create new contact -- New contact details

Form creator	Add Note	View Audit

Camarena, Paul
Email: pcamarena@ph.lacounty.gov

Please enter the email address for the user you wish to add. *(Required)*	Add Note	View Audit

New contact information	Add Note	View Audit

Please fill out the questions for the person you're creating the contact for.
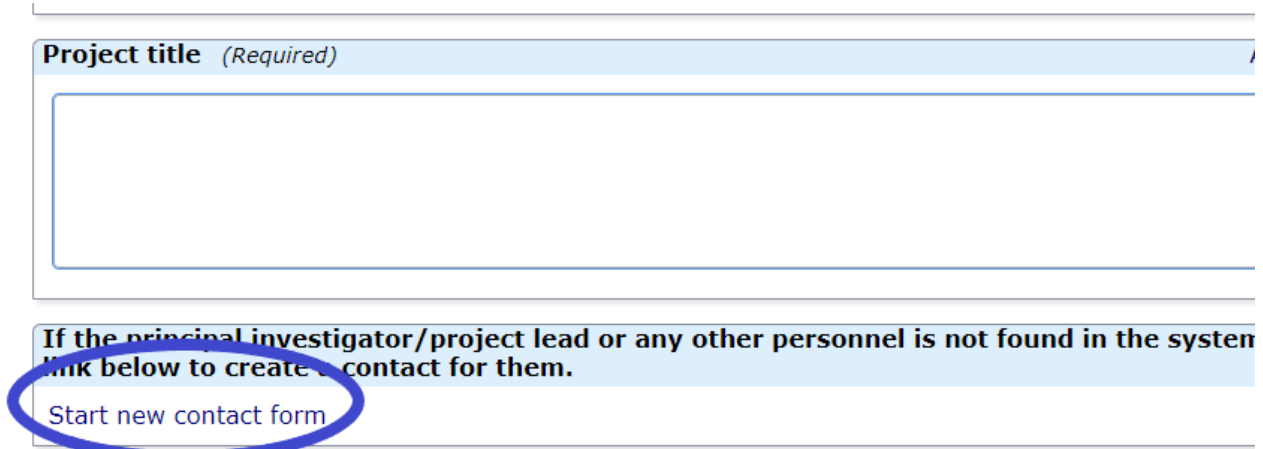
Prefix *(Required)*
i.e., Mr., Ms., Dr., Professor

First name *(Required)*

Last name *(Required)*

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To create a contact from an open application

➢ Click on the "Start new contact form" button which is located just before the section where you are asked to enter the Principal Investigator (PI)/project lead information. You can click this button multiple times to create as many contacts as needed (each new contact form will open in a new window).

Project title *(Required)*

If the principal investigator/project lead or any other personnel is not found in the system link below to create contact for them.

Start new contact form

➢ Clicking on "Start new contact form" will open the *new contact details* page. Enter the required information and click "Next" at the bottom of the page to complete the new contact creation.

SECTION 5. CHANGING SETTINGS AND LOGGING OFF

➢ If you would like to change settings or sign off from IRB Manger, click on the person icon in the upper right-hand corner of the dashboard. Your menu may look slightly different than the image but the *settings* and *sign off* functions will be present.

View as Another User

Recent Items

Use Power Dashboard

Paul's Settings

Dark Mode

Help

Sign off

SECTION 6. SUBMITTING AMENDMENTS, ANNUAL PROGRESS REPORTS, AND ANNUAL CONTINUING REVIEW REQUESTS

➢ From your Dashboard, select the project for which you are submitting an amendment, annual progress report, or annual continuing review request, by clicking on the project's IRB number (hyperlinked as shown in the image below).

💬 If the project for which you would like to submit an amendment, annual status report, or annual continuing review request is not visible on your dashboard, please contact the IRB office. Projects are only visible on your dashboard if you have been listed on a previously approved IRB application or if you have been added as a collaborator by IRB staff.

➢ On the next screen (the *project details* page), click "Start xForm" from the menu on the left.

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- On the following page, click on the link in the *Form* column to open the desired application in a new window.

- Complete the application by responding to all questions and uploading all required documents. Refer to the amendment and annual progress report/ACR checklists, as applicable, available on the IRB's website (click here) for more details about what is required for a complete application.
- When you reach the end of the application, click "Submit" to move the application to the next stage.

FINAL REPORTS

- To submit a final report, start by opening a blank annual progress report. Respond to the questions and, when asked to indicate the current study status, select the "Study completed, attach final report" answer choice.
- You will be prompted to upload a final report near the end of the application. When you reach the end of the application, click "Submit" to move the application to the next stage.

SECTION 7. DELETING APPLICATIONS

- Applications in progress can only be deleted during the *Data Entry* stage (i.e., prior to being submitted for review). To delete an application, click on the xForms tab and then select the "unsubmitted forms" filter.

➢ Hover your mouse on the application you would like to delete and click on the red "X" that appears to complete the deletion (shown below).
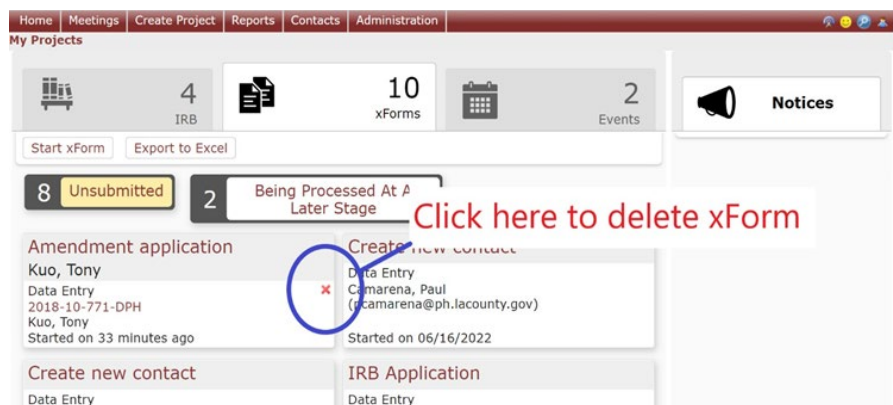
SECTION 8. UPLOADING DOCUMENTS AS ATTACHMENTS

➢ Each attachment should only contain one document type (e.g., recruitment letter, informed consent document, survey, etc.). For instance, when uploading data collection materials, do not include or attach consent or recruitment documents.

➢ If more than one type of data collection instrument will be used (e.g., a survey, an interview script, etc.), upload each document separately.

➢ Please follow these instructions for attaching documents in xForms:

   o Click "Add Attachment" to open a pop-up window on screen
   o Click "Select files" to browse for the document you wish to attach
   o Click "Attach" and the window will auto close and attach the document to your application

SECTION 9. INFORMATION REQUESTED BY THE IRB

➢ Your application may be returned to you during the screening and/or IRB review process with a request for additional information and/or revisions.

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➢ An email will be sent to the person who created and submitted the form (the "form creator") as well as the PI/project lead informing them that their application is being sent back for additional information and/or revisions.

  o Please click on the BLUE link provided in the email to navigate directly to your application. If you are not logged in to IRB Manager, you will be prompted to do so first before you can access the application.

  o Items that require attention can be viewed by selecting the xForms tab and then clicking on the "Awaiting your Attention" filter.

  o Please include 'tracked changes' and 'clean' versions (i.e., without any internal comments, markings, changes, etc.) of any files that are revised in response to a request from the IRB.

➢ When the application and supporting materials have properly addressed the IRB's request, rember to sign and submit the application to move it to the next stage.

SECTION 10. CHECKING THE STATUS OF YOUR APPLICATION

➢ To view the status of an application, navigate to your dashboard. On your dashboard, click on the *xForms* tab to view your applications in progress.

➢ The stage that an application is currently in is listed in the tile below the name of the application (refer to the red underline in the screenshot below).

➢ Clicking on the "Being Processed At A Later Stage" filter tile will display applications that are in a stage of screening/review by the IRB and do not require your immediate attention.
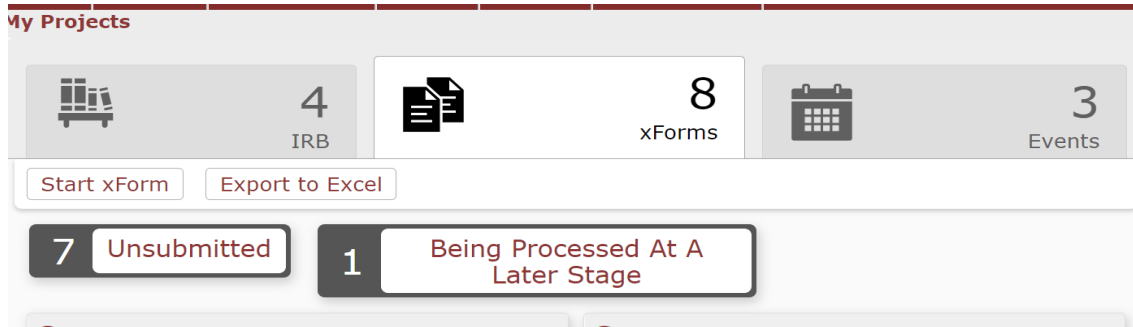
➢ Clicking on the "Unsubmitted" filter tile will filter your existing xForms to display forms that have not yet been submitted to the IRB.

SECTION 11. UPDATING YOUR PROFILE INFORMATION

➢ All users should make sure their profile information, including name and degree(s), is correct. To update your profile information, click on the person icon in the top right corner of your dashboard (see image below) and select "Settings" to go to the next page.
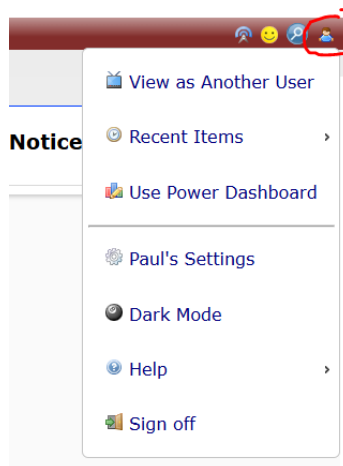
➢ On the *Settings* page, select "Change My Profile".

➢ On the *Change My Profile* page, please make sure your name, degree, and email address are correct. If you need to make corrections, update your information on this page and then click the "Update" button at the bottom of the page.

Section 12. Reporting an Unanticipated/Adverse Event

➢ From your dashboard, click on the IRB # of the project that pertains to the unanticipated/adverse event. Clicking on the IRB # hyperlink will open the project details page.

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➢ On the *project details* page, click on "start xForm" from the menu on the left-hand side of the page.

➢ On the following screen you will be presented with a list of applications. Please select the "Unanticipated/Adverse Events Form" by clicking on the hyperlink to open the form.

Start Form on Project-Site 2022-04-995-DPH
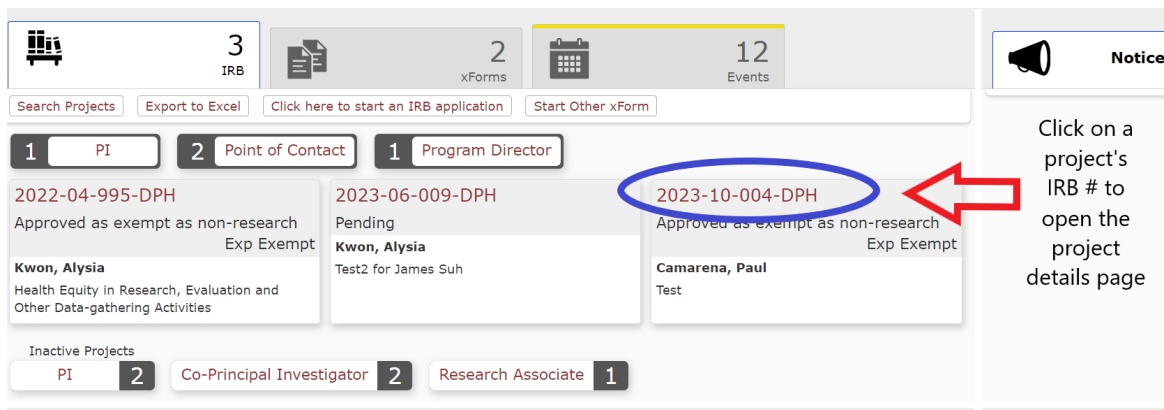
Select xForm to start

Action	Form (Click to start)
🖨	Amendment application
🖨	Annual Continuing Review
🖨	Annual Progress Report
🖨	Unanticipated/Adverse Events Form

➢ Respond to the questions in the form and click "Submit" at the bottom of the page.

Section 13. Viewing Attachments from Past Applications

➢ If you would like to view any supporting documents from past applications, first open the *project details* page by clicking on the desired project from your dashboard.

➢ On the project details page, scroll down to the "Events" section. Here you can find a list of all events (i.e., applications that have been approved) for this project.

> From the list of events, find the application for which you would like to download the attachments. Click on the number next to the name of the application to view the attachments that were included with the application.

> A new page will open with a list of attachments related to that particular application. Click on a file name to begin the download. Files will be downloaded to your local computer by default.

Attachments

Project-Site

PI Kwon, Alysia

Attachments on Amendment Started 03/24/2023 on 2022-04-995-DPH

Attachments (4)

Generated Docs (1)

Action	Name
	Attachment 11. Health Equity SOP Evaluation_Pre&Post.pdf
	Health Equity_ProtocolDetail_TrackedChanges_Feb2023.docx
	Health Equity_ProtocolDetail_CLEAN_Feb2023.docx
	RATE Review Documentation_March 2023.pdf

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