

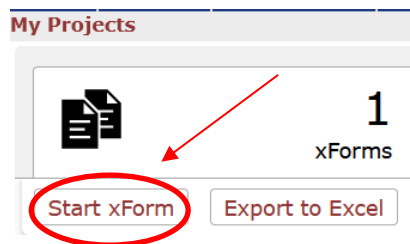
GETTING STARTED: Submitting Amendments/Continuing Reviews in IRBManager (Existing IDEATE Projects)

1. Log into IRBManager (<https://cuny.my.irbmanager.com>) using your CUNYFirst username/password (i.e. john.doe@login.cuny.edu). If you have forgotten your CUNYFirst Log-in Information, reset your password by clicking on the “Forgot Password” link in the [CUNYFirst login page](#).
2. If you are a CUNY Researcher/Research Personnel who DOES NOT have CUNYFirst credentials, request an IRBManager account by emailing irbmanager@cuny.edu and include the following information in your email:
 - First and Last Name
 - EMPLID
 - DOB (Does not need be your actual DOB)
 - PIN (You can make something up)
 - CUNY email address

*You will be notified within 1-2 business days with your credentials to log into IRBManager.
3. Check your user settings by doing the following:



- a. Click on the “Settings” icon on the top-right corner of the page.
 - b. Ensure all your personal information in your profile is correct. IRBManager pulls user information directly from the CUNYFirst system. **If any information is incorrect, please contact your campus’ HRDepartment to request changes to your CUNYFirst information. Once these changes are made directly at the CUNYFirst level, IRBManager will update your information automatically.**
4. Link your CUNY institutional email address to your profile by completing the [Update My Email Address](#) xform. The xform can also be accessed under “Start xform” from your Dashboard.



5. IRBManager automatically links CITI completion information with your IRBManager profile. To grant access to your CUNY CITI completion information, please complete one of the following:
 - A. ****PREFERRED****

The process for confirming and/or changing your preferred email address in CITI is as follows (this process applies to ALL research personnel on a protocol, if applicable):

 - i. Log in to CITI at <https://www.citiprogram.org>
 - ii. In the upper right corner under your name and ID, click the down arrow.
 - iii. Select “Profiles”.
 - iv. Under “Member Profiles”, click “Edit Profile”.

GETTING STARTED: Submitting Amendments/Continuing Reviews in IRBManager (Existing IDEATE Projects)

- v. Scroll down to your preferred email address.
 - vi. Confirm that this is your current CUNY email address, or revise if needed.
- B. Click “Update CITI Alternate Email Address”. You can access this form under ‘Start xForm’ on the Dashboard. This form is for adding to your profile an alternate email address under which you have taken CITI training.

***IRBManager uploads CUNY CITI completion information to the site every morning at 7AM. Please allow 1-2 business days for your CITI completion information to be migrated into your IRBManager user profile. If this does not occur after 1-2 business days, please contact your [Campus’ HRPP Coordinator](#) for further assistance.**

6. Make sure that all of your active projects (i.e. exempt/expedited/full board projects) are listed on the Dashboard. **If you have logged in using your CUNYFirst credentials and your active protocols are missing, please contact your [Campus’ HRPP Coordinator](#) for further assistance.**
- Only protocol shells were migrated into IRBManager. Make sure to review all of your migrated protocols to ensure the study information is correct. If approval/expiration dates, approval categories (such as Exempt or Expedited categories) or the approved enrollment number is missing or incorrect—please contact your [Campus’ HRPP Coordinator](#) for further assistance.

7. **Active approved protocols (from IDEATE) must be transferred over into the IRBManager system prior to creating a Continuing Review for the study.**

- Save all your approved IDEATE protocol forms, determination letters and corresponding research documents (i.e., recruitment, consent and data collection materials). See instructions on next page (page 3 of this document).
- To transfer the active approved protocol data (including attachments from IDEATE) into IRBManager, please create an Amendment Request for your existing project by watching the “Creating Amendments” [video](#) (1:33 min) or following the instructions in the [IRBManager User Manual](#) (Section 13).
 - *Copy for Amendment:* Select to request changes to existing migrated active approved protocol(s) OR to transfer active approved protocol(s) information including attachments from IDEATE.
- Complete the Amendment Request xform by filling in the empty fields and submit.
- Once the Amendment has been submitted, the Continuing Review xform could be created/submitted by watching the “Creating Continuing Review...” [video](#) (1:30 min) or following the instructions in the [IRBManager User Manual](#) (Section 8).

*** Student PI submissions will be sent to their Faculty Advisor for approval prior to submission to the Advisor’s primary Campus HRPP office.**

8. Before adding CUNY-affiliated Research Personnel to protocols, Research Personnel must log onto the IRBManager system prior to being added to the IRB application.
- When adding Research Personnel to xForms, please make sure that profiles added have a CUNYFirst username (i.e. [john.doe@login.cuny.edu](#)). If you find key personnel in IRBManager with their CUNY institutional email address (i.e., [john.doe@baruch.cuny.edu](#)),

GETTING STARTED: Submitting Amendments/Continuing Reviews in IRBManager (Existing IDEATE Projects)

please ask them to log into IRBManager using their CUNYFirst credentials and then select the CUNYFirst-linked profile ending with “@login.cuny.edu”.

9. For IRBManager help documents and videos, please refer to the following:
 - [Training Videos](#)
 - [IRBManager User Manual](#)
 - Log into your IRBManager Account and look at the help information found under “Notices” on the right-hand side of the screen.

Instructions to print/save documents from the IDEATE LiveList:

1. Click on the *Home* button at the top of the screen to return to the *LiveList*.
2. Once you see the *LiveList* screen, click on the protocol number of the study you want to print out.
3. Let the *Lifecycle Event Manager* load and then click “view” under *Details* of the most recent Amendment Request submission of the protocol. If you have not submitted an Amendment for this study, then work with the Initial Application submission.

(*Note*: If you would like to print the most recent Continuing Review, then click on the most recent Continuing Review submission).

4. A new window will load with the application. Please click on the blue “print” button at the top-right hand corner of the screen.
5. A pdf file will appear or upload to your *Downloads* file (depending on the browser you are using). You will be able to print the pdf file.

Remember to disable your pop-up blocker prior to downloading the pdf print out of your protocol application.