

**MARSHALL UNIVERSITY**



OFFICE OF  
RESEARCH INTEGRITY

**Conflict of Interest (COI)  
IRBNet User Manual**

## User Manual

This user manual is designed to assist in the use of IRBNet for submission of Conflict of Interest (COI) disclosures. You will find assistance in registration, SFID submission, SFID updates and annual submissions. If you have any problems or questions please feel free to contact the Office of Research Integrity for assistance.

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## 1. Registration Instructions

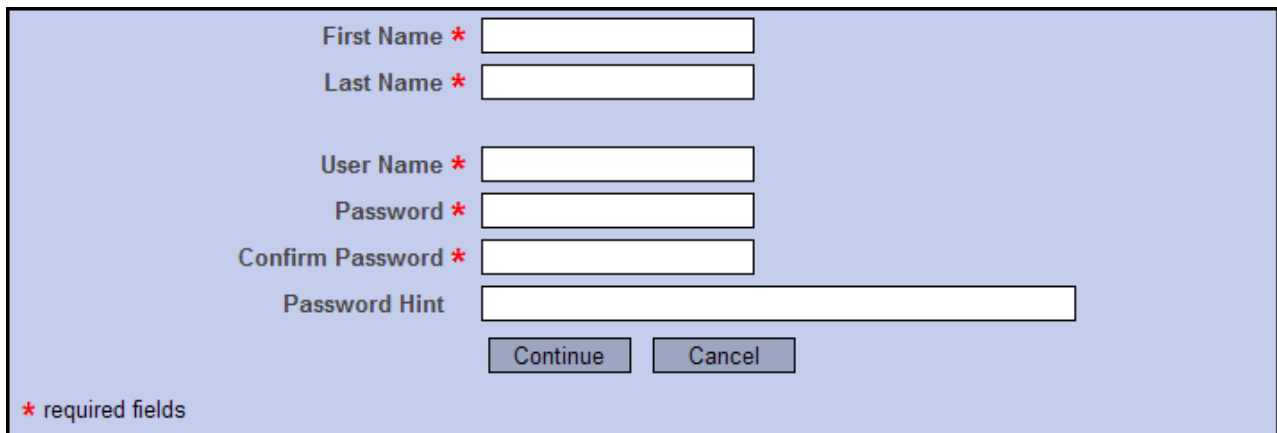
1. Go to <http://www.irbnet.org>
2. In the upper right hand corner, right below the login boxes, click the New User Registration button.



Login:

 New User Registration |  Forgot Your Password?

3. Fill in your name, choose a user name and choose a password.



First Name \*

Last Name \*

User Name \*

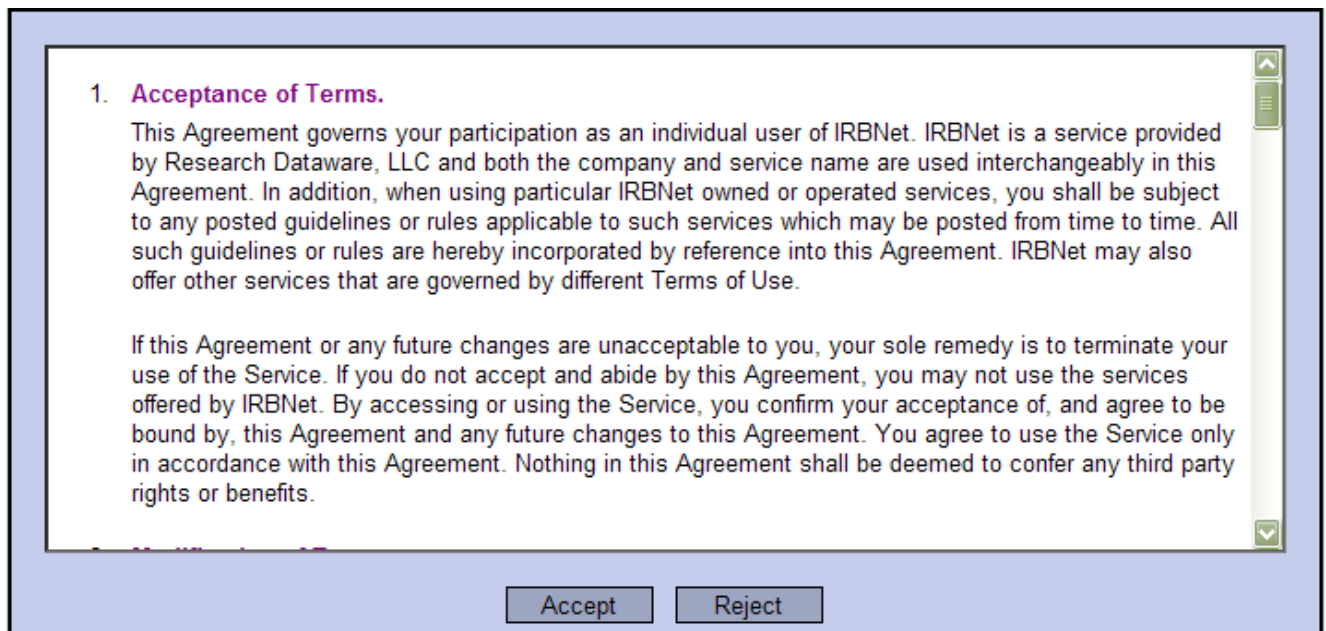
Password \*

Confirm Password \*

Password Hint

\* required fields

4. Accept the Terms of Use

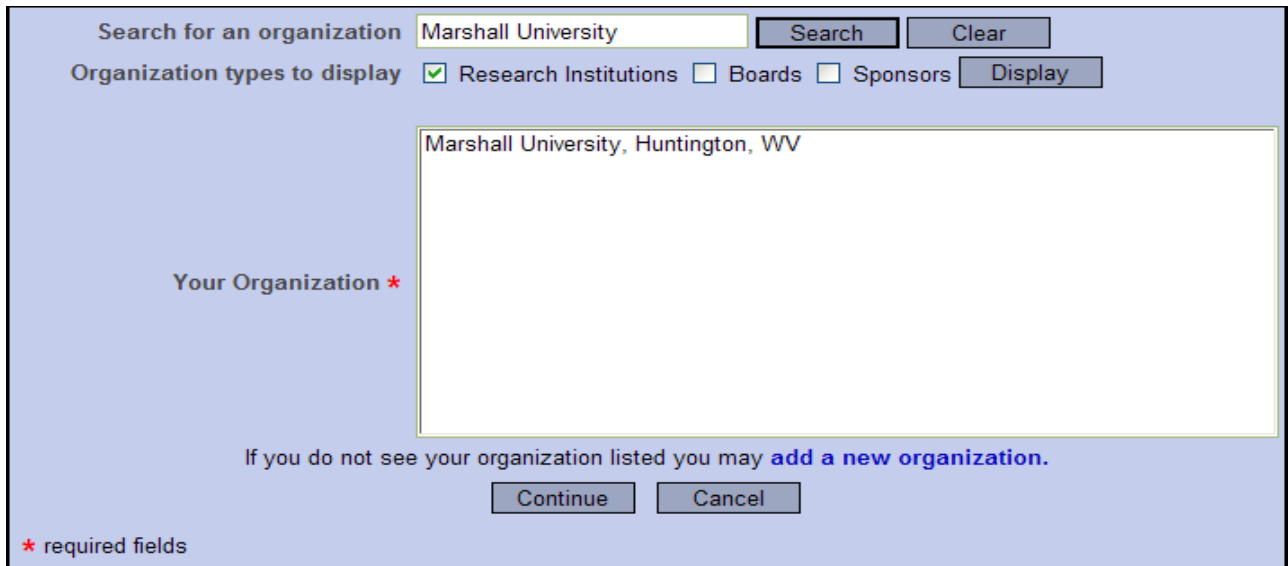


**1. Acceptance of Terms.**

This Agreement governs your participation as an individual user of IRBNet. IRBNet is a service provided by Research Dataware, LLC and both the company and service name are used interchangeably in this Agreement. In addition, when using particular IRBNet owned or operated services, you shall be subject to any posted guidelines or rules applicable to such services which may be posted from time to time. All such guidelines or rules are hereby incorporated by reference into this Agreement. IRBNet may also offer other services that are governed by different Terms of Use.

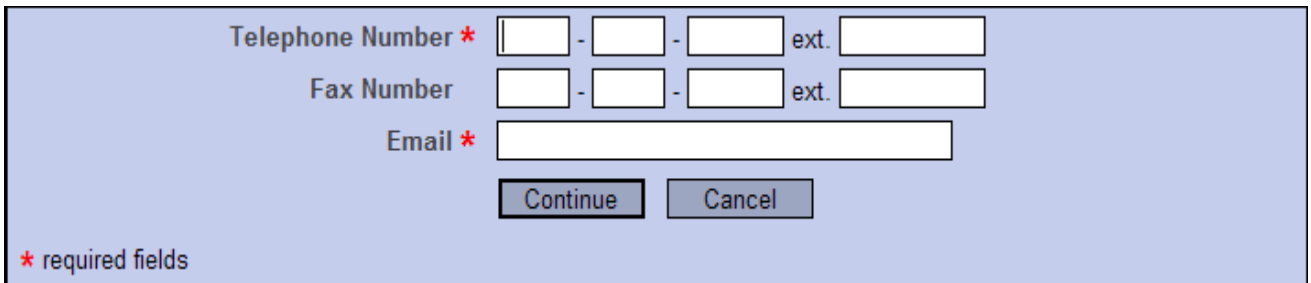
If this Agreement or any future changes are unacceptable to you, your sole remedy is to terminate your use of the Service. If you do not accept and abide by this Agreement, you may not use the services offered by IRBNet. By accessing or using the Service, you confirm your acceptance of, and agree to be bound by, this Agreement and any future changes to this Agreement. You agree to use the Service only in accordance with this Agreement. Nothing in this Agreement shall be deemed to confer any third party rights or benefits.

- Next, add an affiliation. In the *Search for and organization* box, type Marshall University and click “Search”. Highlight Marshall University (in the lower box) and click “Continue”.



The screenshot shows a web form with a light blue background. At the top, there is a text input field containing "Marshall University" and two buttons: "Search" and "Clear". Below this is a section for "Organization types to display" with three checkboxes: "Research Institutions" (checked), "Boards", and "Sponsors", followed by a "Display" button. A large white box contains the text "Marshall University, Huntington, WV". To the left of this box is the label "Your Organization \*". At the bottom of the form, there is a message: "If you do not see your organization listed you may [add a new organization.](#)" and two buttons: "Continue" and "Cancel". In the bottom left corner, there is a red asterisk followed by the text "\* required fields".

- Enter your telephone number and a working email address. The email you use here will be the one used by the IRB board to communicate with you for approval and questions. Your email address will not be used for marketing purposes.



The screenshot shows a web form with a light blue background. It contains three rows of input fields: "Telephone Number \*", "Fax Number", and "Email \*". Each row has a main input field and a smaller "ext." field. Below the input fields are two buttons: "Continue" and "Cancel". In the bottom left corner, there is a red asterisk followed by the text "\* required fields".

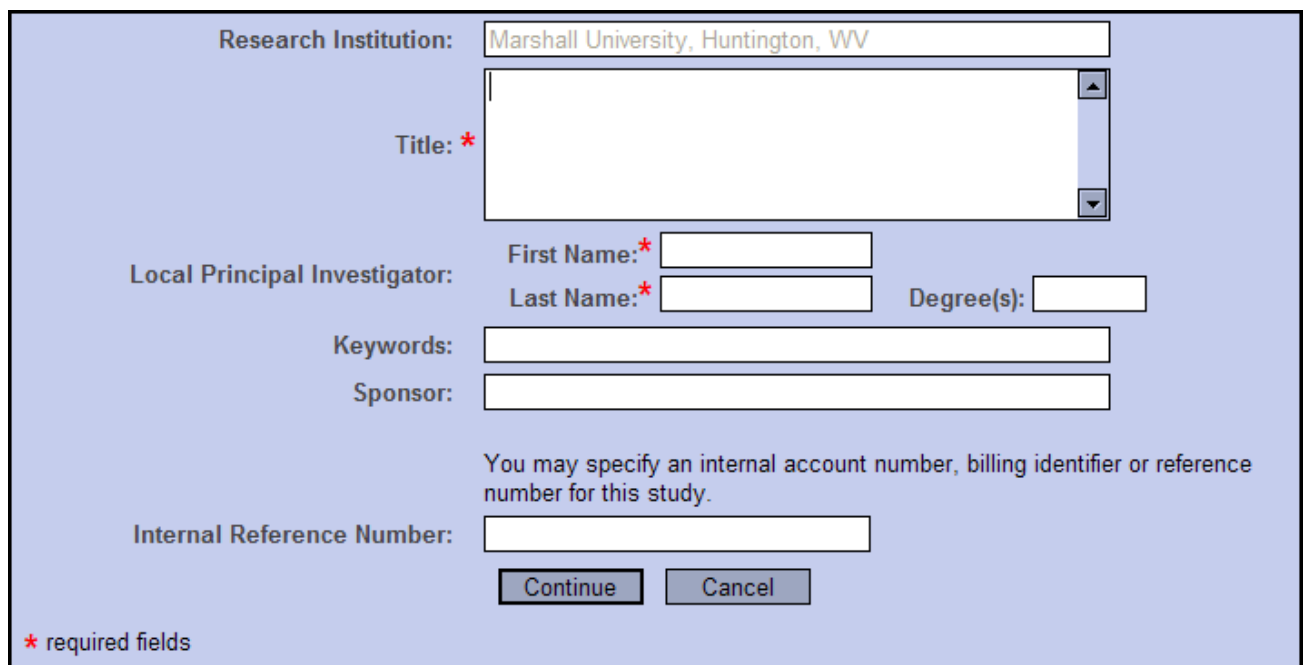
- The last screen will confirm the information you have entered. Make sure that in the second box, it lists *Researcher* at Marshall University. Click the Register button.
- Once you have clicked the Register button, an email will be sent to you. If you do not receive that confirmation email in a short period then check your spam folder to see if it is there. If the notification is in your spam folder then mark it as “Not Spam” and click “Deliver”. That email contains a link which will confirm your registration. Once you click that link, you will be taken back to the home page of IRBNet. At this point you should be able to login and begin creating a new study.

## 2. SFID Submission Instructions

To submit a Significant Financial Interest Disclosure (SFID) for review you must first Create a New Project to store your documents. Any type of document can be uploaded (i.e. contracts, supporting documentation, etc.) but you must ensure the SFID form is attached at a minimum. All forms can be accessed through our website or the IRBNet library.

### To create your first package:

1. Go to [www.irbnet.org](http://www.irbnet.org) and login using the user name and password you created previously.
2. On the navigation bar to your left, click the button titled “Create New Project”.
3. In the “Title” section enter SFID. In the boxes provided enter your first name, last name and degree(s) (if applicable). (*see picture below*)
4. The keywords box is for your reference only and will assist you later if you need to search through your submissions. You can also leave it blank. (*see picture below*)
5. The “Sponsor” field and the Internal Reference Number” field are for your use. You can enter any information in these fields for your use and it can only be seen by those shared on your submission. You can also leave it blank. (*see picture below*)
6. Click the “Continue” button when finished.



The screenshot shows a web form for creating a new project. The form is set against a light blue background. At the top, the 'Research Institution' field is populated with 'Marshall University, Huntington, WV'. Below this is a large, empty text area for the 'Title', which is marked with a red asterisk. The 'Local Principal Investigator' section contains three fields: 'First Name' (with a red asterisk), 'Last Name' (with a red asterisk), and 'Degree(s)'. Below these are 'Keywords' and 'Sponsor' fields. An 'Internal Reference Number' field is located below the 'Sponsor' field, with a note: 'You may specify an internal account number, billing identifier or reference number for this study.' At the bottom of the form are two buttons: 'Continue' and 'Cancel'. A legend at the bottom left indicates that a red asterisk denotes 'required fields'.

7. You will next be brought to the *Designer* page. This page is where you can access the library (if needed). **For the Significant Financial Interest Disclosure (SFID) Form** Click the button “Add New Document” (center of the page) to access the form. (see picture below)

## Designer

[234633-1] New SFID

### Step 1:

Download blank forms, document templates and reference materials to assist you in assembling your document package.

Select a Library:

Select a Document:

### Step 2:

Assemble your document package.

Documents in this Package:

*There are currently no documents in this package.*

8. When you click the “Add New Document” button the boxes below will appear. In the “Online Document Box” (lower box) click “Add” to access the SFID Form. If you are attaching other documents to your submission then choose the document type (upper) closest to the document you are uploading. (see picture below)

You may attach documents to this package by clicking the “Browse...” button to locate a document and then by clicking “Attach”. The “Document Type” and optional “Description” are informational fields to assist you in managing your attached documents.

Document Type \*

Description

File \*

\* required fields

You may also use the IRBNet Document Wizards to create documents on-line. Documents that you create on-line are automatically attached in PDF format.

On-Line Document

- Follow the instructions on the SFID form. You can save and close the form at any time and then complete it at a later date. Once you have completed the SFID it will appear as a document package. You can attach other documents you wish to submit by clicking on the button “Add New Document” (*see picture below*)

**Step 2:**

Assemble your document package.

Documents in this Package:

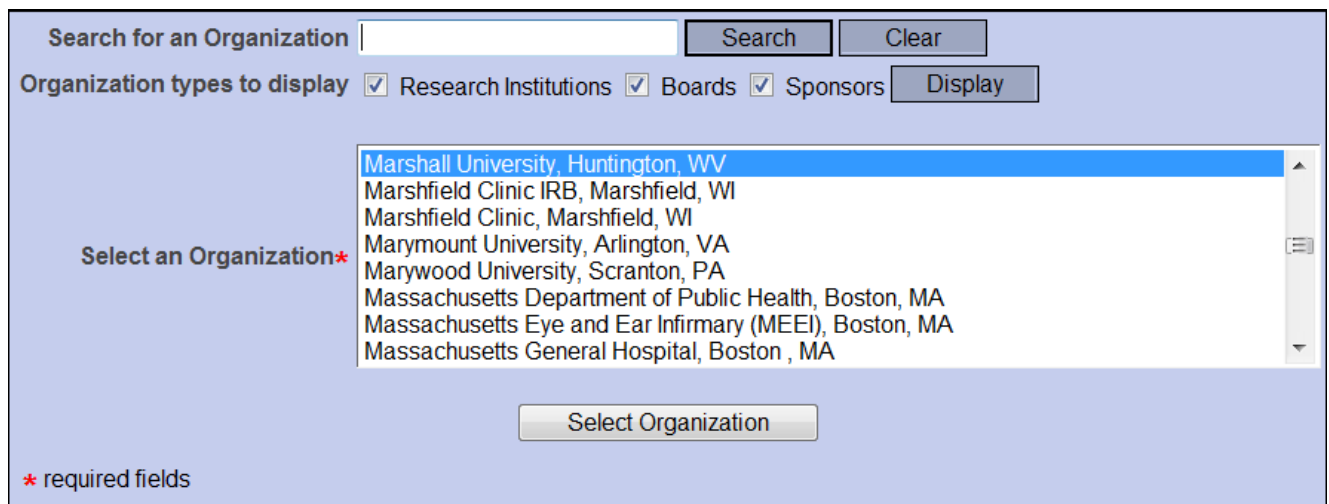
Document Type	Description	Last Modified
Significant Financial Interest Disclosure	Significant Financial Interest Disclosure	04/12/2011 11:03 AM

Add New Document

- Once all the documents are uploaded it is time to share the SFID. Since this submission will require the signature of your Department Chair/Supervisor you will need to share the SFID with him/her for signature. On the left side navigation bar, click the “Share this Project” button. On the Share screen, choose “Share.” (*see picture below*)

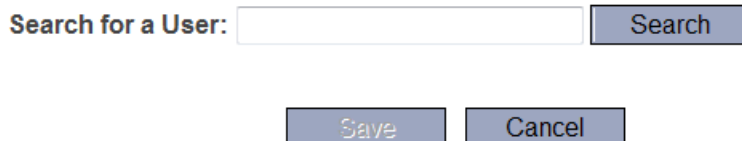
- Share:** Use this option if you wish to share your study with other Researchers, Committee Members, Administrators or Sponsors at your own institution or any other institution. For example, you may wish to share this study with other members of your research team so that you may collaborate in the design and development of the study, or with a selected Committee Member or Administrator to solicit feedback prior to submitting your study. You may provide any individual with **Full**, **Write** or **Read** access.
- Multi-site:** Use this option only if your study is a multi-site study and you wish to send a complete and independent copy of this study to a Principal Investigator at another site. The local Principal Investigator will receive their own independent copy of all study documents and may modify their copy of these documents (such as consent forms) to meet the requirements of their local Board. You will be able to monitor the progress of this study at every local site. The other local Principal Investigators will also be able to monitor the progress of this study at every local site (including your own).
- Transfer:** Transfer your ownership of this study to another user. In doing so you will relinquish all access to this study and the designated user will be granted **Full** access.

- The next page will default to Marshall University, so if it is highlighted just click on “Select Organization”. If Marshall University does not appear in the selection box then search for Marshall University and then select it. (*see picture below*)



The screenshot shows a web interface for searching organizations. At the top, there is a search box labeled "Search for an Organization" with a "Search" button and a "Clear" button. Below this, there are checkboxes for "Organization types to display": "Research Institutions", "Boards", and "Sponsors", all of which are checked. A "Display" button is next to these checkboxes. The main area is a list box titled "Select an Organization\*" containing the following entries: "Marshall University, Huntington, WV" (highlighted in blue), "Marshfield Clinic IRB, Marshfield, WI", "Marshfield Clinic, Marshfield, WI", "Marymount University, Arlington, VA", "Marywood University, Scranton, PA", "Massachusetts Department of Public Health, Boston, MA", "Massachusetts Eye and Ear Infirmary (MEEI), Boston, MA", and "Massachusetts General Hospital, Boston, MA". A "Select Organization" button is located below the list. At the bottom left, there is a red asterisk followed by the text "\* required fields".

12. You will be brought to a screen with a search box. The search results will include anyone registered on IRBNet under Marshall University. Just enter the last name of the person you are searching for and then click “Search.” (*see picture below*)



The screenshot shows a web interface for searching users. It features a search box labeled "Search for a User:" with a "Search" button. Below the search box are two buttons: "Save" and "Cancel".

Once you enter the last name of the person, everyone in the system with that last name will appear. When you find the person you are searching for you can grant them the desired access. Each user will be sent an email informing them that they have been granted access to your project. You can also add comments that will be included in the email by typing that information in the “Comments” box beneath the list of names. (*see picture below*)

Search for a User:  

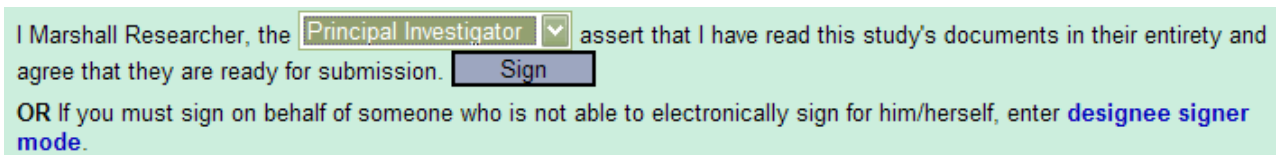
IRBNet User	Permission Access
Cartwright, Tina	<input type="radio"/> Full <input type="radio"/> Write <input type="radio"/> Read <input checked="" type="radio"/> No Access
Wright, Christina	<input type="radio"/> Full <input type="radio"/> Write <input type="radio"/> Read <input checked="" type="radio"/> No Access
Wright, Rebecca	<input type="radio"/> Full <input type="radio"/> Write <input type="radio"/> Read <input checked="" type="radio"/> No Access

3 Users found, displaying all Users.

Each user will be automatically notified that they have been granted access to this project. You may also specify additional comments to be included in this notification:

Your Comments

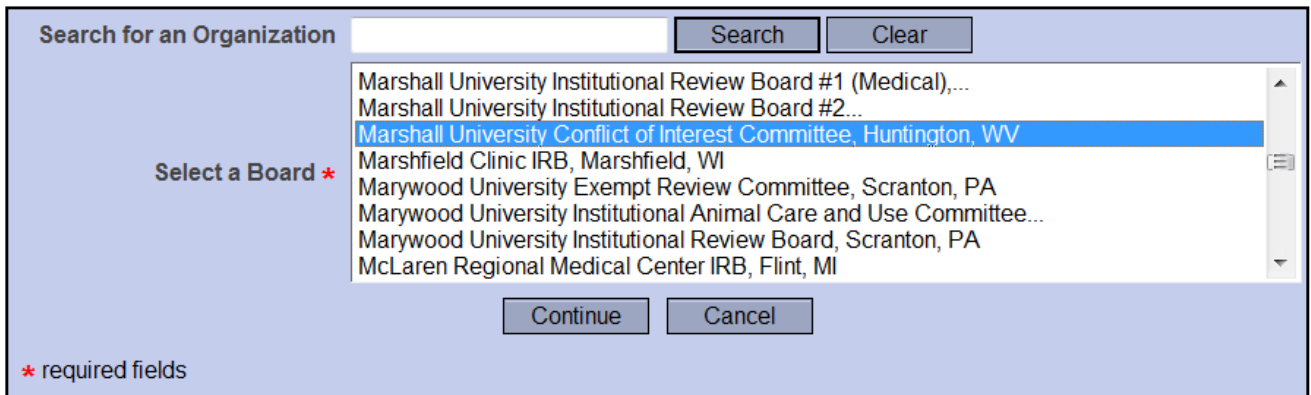
13. When all documents are uploaded, and you have shared your SFID, then you need to sign your package electronically. To do this, click the “Sign this Package” button on the left side navigation bar. A drop down box will appear and you should select your status.  
(see picture below)



You need to pause at this point until the package has also been signed by your Department Chair/Supervisor. Once everyone has signed the package you can continue.

- Once you and your Department Chair/Supervisor have electronically signed the package, click the “Submit this Package” button on the navigation bar. All MU Boards will appear on the list so highlight the “Conflict of Interest Committee.” (see picture below) Click “Continue”.

Please select a Board:



Search for an Organization

Select a Board \*

- Marshall University Institutional Review Board #1 (Medical),...
- Marshall University Institutional Review Board #2...
- Marshall University Conflict of Interest Committee, Huntington, WV**
- Marshfield Clinic IRB, Marshfield, WI
- Marywood University Exempt Review Committee, Scranton, PA
- Marywood University Institutional Animal Care and Use Committee...
- Marywood University Institutional Review Board, Scranton, PA
- McLaren Regional Medical Center IRB, Flint, MI

\* required fields

- On the final screen, in the “Submission Type” drop-down menu, choose the appropriate type (initially it will be “Declaration”). You can leave comments in the Comment box, but they are not required. Finally, click the Submit button. (see picture below)



The following IRBNet users at **Marshall University Conflict of Interest Committee** will be automatically notified of your submission:

- Day, Bruce
- Melton, Amy

Submission Type: \*

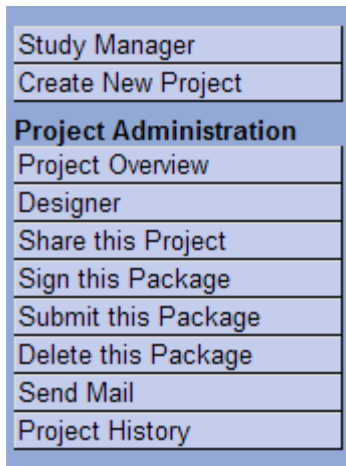
You may also specify additional comments to be included in this notification.

Your Comments:

- Once you hit the Submit button, you will be given a confirmation showing the time it was submitted. Keep in mind that this project is now locked. The project status on your IRBNet home page will change from “Work in Progress” to “Pending Review.” You will be contacted if corrections are needed. If nothing additional is required then everyone with full access will be notified via email once the SFID has been reviewed and approved.

### 3. SFID Update Instructions (When there have significant changes to your SFID and an update is required.)

Once you have the study open just click on the “Project History” button on the left side navigation bar.



1. You will be brought to a screen called the *Project History*. Click on the “Create New Package” button half-way down the page.

	◆ Pkg #	Package Type	◆ Status	◆ Create Date	◆ Submission Date	◆ Review Date
▶	1	New Project	Approved	01/21/2009	01/21/2009	04/21/2009
One Package found.						
▶ You are currently viewing this package.						
Your current document package has already been submitted and is presently locked by your Board. You may prepare new or modified documents (such as Revision/Amendment materials, Renewal/Continuing Review materials, and Adverse Event Reports) by creating a new document package.						
<input type="button" value="Create New Package"/>						

2. A “New Document Package” will appear as a “Work in Progress.” Click on this title and you will go to the *Designer* page where you can add your new documents to this package.

	◆ Pkg #	Package Type	◆ Status	◆ Create Date	◆ Submission Date	◆ Review Date
▶	2	New Document Package	Work in progress	04/22/2009		
	1	New Project	Approved	01/21/2009	01/21/2009	04/21/2009
2 Packages found, displaying all Packages.						
▶ You are currently viewing this package.						

- You will next be brought to the *Designer* page. For the Significant Financial Interest Disclosure (SFID) form Click the button “Add New Document” (center of the page) to access the form. (see picture below)

**Designer**

[234633-1] New SFID

**Step 1:**

Download blank forms, document templates and reference materials to assist you in assembling your document package.

Select a Library:

Select a Document:

**Step 2:**

Assemble your document package.

Documents in this Package:

*There are currently no documents in this package.*

- When you click the “Add New Document” button the boxes below will appear. In the “Online Document Box” (lower box) click “Add” to access the SFID Form. If you are attaching other documents to your submission then choose the document type (upper) closest to the document you are uploading. (see picture below)

You may attach documents to this package by clicking the "Browse..." button to locate a document and then by clicking "Attach". The "Document Type" and optional "Description" are informational fields to assist you in managing your attached documents.

Document Type *	<input type="text"/>
Description	<input type="text"/>
File *	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="Attach"/> <input type="button" value="Cancel"/>	

\* required fields

You may also use the IRBNet Document Wizards to create documents on-line. Documents that you create on-line are automatically attached in PDF format.

On-Line Document	<input type="text" value="Significant Financial Interest Disclosure"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

- Follow the instructions on the SFID form. You can save and close the form at any time and then complete it at a later date. Once you have completed the SFID it will appear as a document package. You can attach other documents you wish to submit by clicking on the button “Add New Document” (*see picture below*)

**Step 2:**

Assemble your document package.

**Documents in this Package:**

Document Type	Description	Last Modified
Significant Financial Interest Disclosure	Significant Financial Interest Disclosure	04/12/2011 11:03 AM

**NOTE:** You should also attach a memo that states the reason for this revision. Repeat the uploading steps until all documents are attached to your package.

- When all documents are uploaded you need to sign your package electronically. To do this, click the “Sign this Package” button on the left side navigation bar. A drop down box will appear and you should select your status. (*see picture below*)

I Marshall Researcher, the  assert that I have read this study's documents in their entirety and agree that they are ready for submission.

OR If you must sign on behalf of someone who is not able to electronically sign for him/herself, enter **designee signer mode**.

You need to pause at this point until the package has also been signed by your Department Chair/Supervisor. Since you have already shared your original package with your Department Chair/Supervisor they will have access to this package. Just send them an email asking them to review and sign this new submission. Once everyone has signed the package you can continue.

- Once you and your Department Chair/Supervisor have electronically signed the package, click the “Submit this Package” button on the navigation bar. All MU Boards will appear on the list so highlight the “Conflict of Interest Committee.” (*see picture below*) Click “Continue.”

Please select a Board:



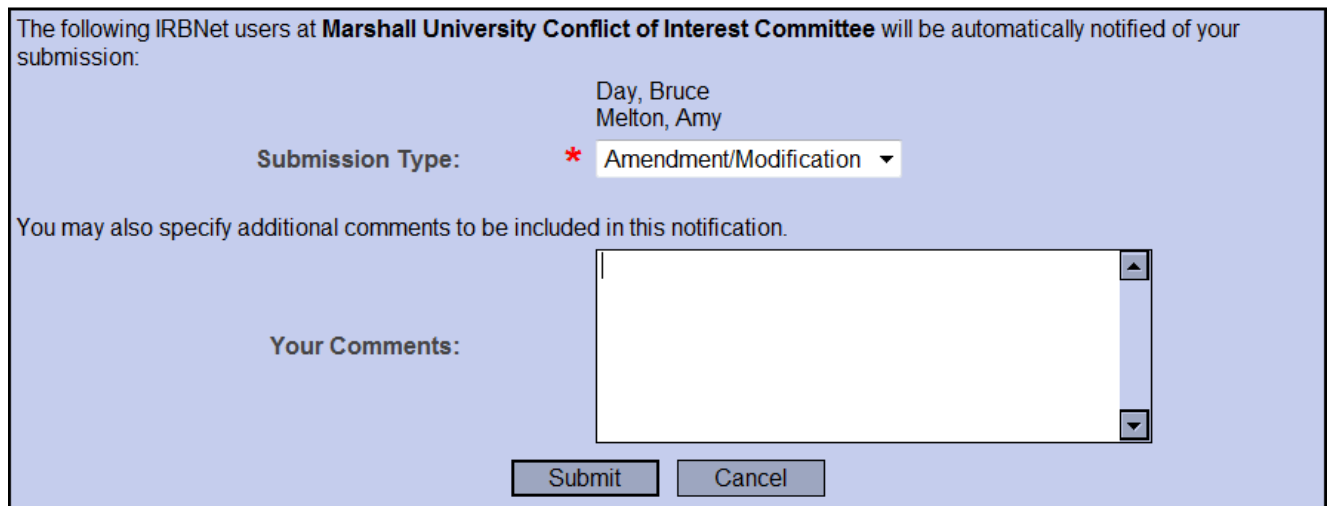
Search for an Organization

Select a Board \*

- Marshall University Institutional Review Board #1 (Medical),...
- Marshall University Institutional Review Board #2...
- Marshall University Conflict of Interest Committee, Huntington, WV**
- Marshfield Clinic IRB, Marshfield, WI
- Marywood University Exempt Review Committee, Scranton, PA
- Marywood University Institutional Animal Care and Use Committee...
- Marywood University Institutional Review Board, Scranton, PA
- McLaren Regional Medical Center IRB, Flint, MI

\* required fields

- On the final screen, in the “Submission Type” drop-down menu, choose the appropriate type (an update would be an “Amendment/Modification”). You can leave comments in the Comment box, but they are not required. Finally, click the Submit button. (*see picture below*)



The following IRBNet users at **Marshall University Conflict of Interest Committee** will be automatically notified of your submission:

Day, Bruce  
Melton, Amy

Submission Type: \*

You may also specify additional comments to be included in this notification.

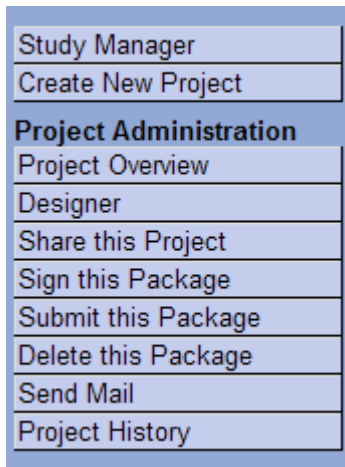
Your Comments:

- Once you hit the Submit button, you will be given a confirmation showing the time the package was submitted. Keep in mind that this project is now locked. The project status on your IRBNet home page will change from “Work in Progress” to “Pending Review.” You will be contacted if corrections are needed. If nothing additional is required then everyone with full access will be notified via email once the SFID has been reviewed and approved.

#### 4. SFID Annual Submission Instructions

##### To submit an annual SFID package:

To submit an annual SFID, you must first open the study. Keep in mind that you **do not** want to create a new project. You want to add a package to an already existing SFID submission. Once you have the study open just click on the “Project History” button on the left side navigation bar.



1. You will be brought to a screen called the *Project History*. Click on the “Create New Package” button half-way down the page.

◆	Pkg #	Package Type	◆	Status	◆	Create Date	◆	Submission Date	◆	Review Date
▶	1	New Project	◆	Approved	◆	01/21/2009	◆	01/21/2009	◆	04/21/2009
One Package found.										
▶ You are currently viewing this package.										
Your current document package has already been submitted and is presently locked by your Board. You may prepare new or modified documents (such as Revision/Amendment materials, Renewal/Continuing Review materials, and Adverse Event Reports) by creating a new document package.										
<input type="button" value="Create New Package"/>										

2. A “New Document Package” will appear as a “Work in Progress.” Click on this title and you will go to the *Designer* page where you can add your new documents to this package.

◆	Pkg #	Package Type	◆	Status	◆	Create Date	◆	Submission Date	◆	Review Date
▶	2	New Document Package	◆	Work in progress	◆	04/22/2009	◆		◆	
	1	New Project	◆	Approved	◆	01/21/2009	◆	01/21/2009	◆	04/21/2009
2 Packages found, displaying all Packages.										
▶ You are currently viewing this package.										

- You will next be brought to the *Designer* page. For the Significant Financial Interest Disclosure (SFID) form Click the button “Add New Document” (center of the page) to access the form. *(see picture below)*

## Designer

[234633-1] New SFID

**Step 1:**

Download blank forms, document templates and reference materials to assist you in assembling your document package.

Select a Library:  ▾

Select a Document:  ▾

**Step 2:**

Assemble your document package.

Documents in this Package:

*There are currently no documents in this package.*

- When you click the “Add New Document” button the boxes below will appear. In the “Online Document Box” (lower box) click “Add” to access the SFID Form. If you are attaching other documents to your submission then choose the document type (upper) closest to the document you are uploading. *(see picture below)*

You may attach documents to this package by clicking the "Browse..." button to locate a document and then by clicking "Attach". The "Document Type" and optional "Description" are informational fields to assist you in managing your attached documents.

Document Type \*

Description

File \*

\* required fields

You may also use the IRBNet Document Wizards to create documents on-line. Documents that you create on-line are automatically attached in PDF format.

On-Line Document  ▾

- Follow the instructions on the SFID form. You can save and close the form at any time and then complete it at a later date. Once you have completed the SFID it will appear as a document package. You can attach other documents you wish to submit by clicking on the button “Add New Document” (*see picture below*)

**Step 2:**

Assemble your document package.

Documents in this Package:

Document Type	Description	Last Modified
Significant Financial Interest Disclosure	Significant Financial Interest Disclosure	04/12/2011 11:03 AM

When all documents are uploaded you need to sign your project electronically. To do this, click the “Sign this Package” button on the left side navigation bar. A drop down box will appear and you should select your status on this study. (*see picture below*)

I Marshall Researcher, the  assert that I have read this study's documents in their entirety and agree that they are ready for submission.

OR If you must sign on behalf of someone who is not able to electronically sign for him/herself, enter [designee signer mode](#).

You need to pause at this point until the package has also been signed by your Department Chair/Supervisor. Since you have already shared your original package with your Department Chair/Supervisor they will have access to this package. Just send them an email asking them to review and sign this new submission. Once everyone has signed the package you can continue.

- Once you and your Department Chair/Supervisor have electronically signed the package, click the “Submit this Package” button on the navigation bar. All MU Boards will appear on the list so highlight the “Conflict of Interest Committee.” (*see picture below*) Click “Continue.”

Please select a Board:

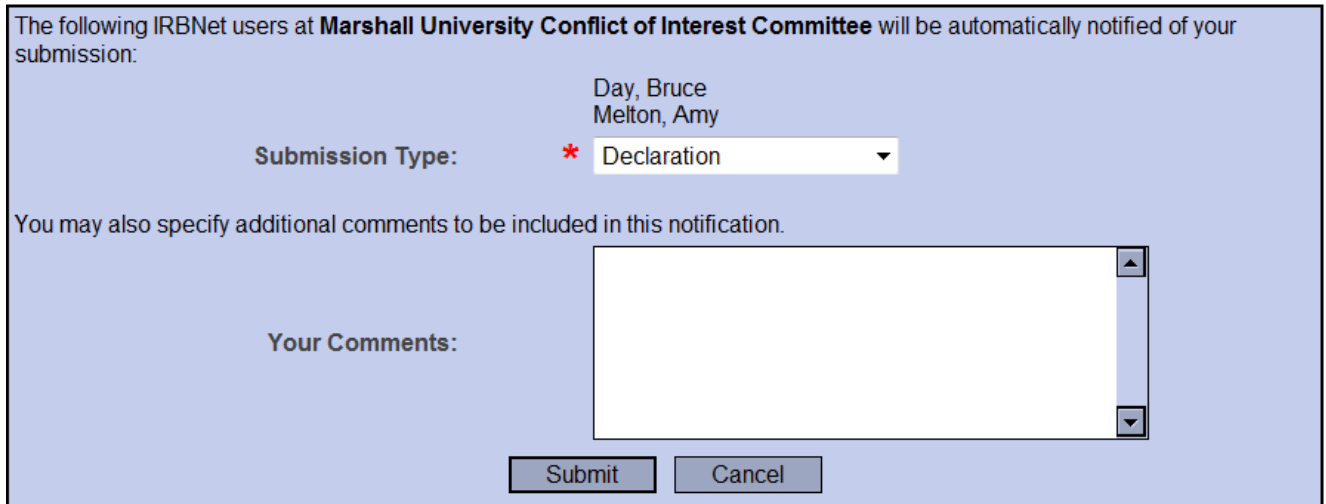
Search for an Organization

Select a Board \*

- Marshall University Institutional Review Board #1 (Medical),...
- Marshall University Institutional Review Board #2...
- Marshall University Conflict of Interest Committee, Huntington, WV
- Marshfield Clinic IRB, Marshfield, WI
- Marywood University Exempt Review Committee, Scranton, PA
- Marywood University Institutional Animal Care and Use Committee...
- Marywood University Institutional Review Board, Scranton, PA
- McLaren Regional Medical Center IRB, Flint, MI

\* required fields

7. On the final screen, in the “Submission Type” drop-down menu, choose the appropriate type (an annual report would be a “Declaration”). You can leave comments in the Comment box, but they are not required. Finally, click the Submit button. (*see picture below*)



The following IRBNet users at **Marshall University Conflict of Interest Committee** will be automatically notified of your submission:

Day, Bruce  
Melton, Amy

**Submission Type:** \* Declaration

You may also specify additional comments to be included in this notification.

**Your Comments:**

Submit Cancel

8. Once you hit the Submit button, you will be given a confirmation showing the time the package was submitted. Keep in mind that this project is now locked. The project status on your IRBNet home page will change from “Work in Progress” to “Pending Review.” You will be contacted if corrections are needed. If nothing additional is required then everyone with full access will be notified via email once the SFID has been reviewed and approved.

## 5. Supervisory Signature

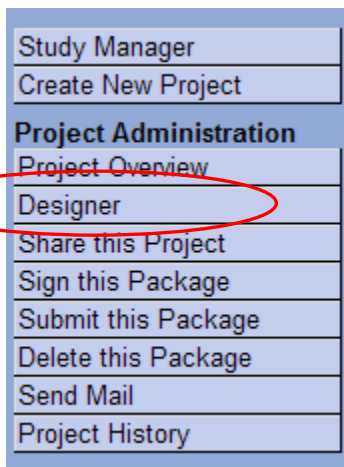
### To sign the package as a Department Head/Supervisor:

To sign an SFID submission as a department head/supervisor, you must first log in to IRBNet and open the package. Keep in mind that you **do not** want to create a new project.




To open the package just click on the Project Title (in blue) of the SFID you need to sign.

IRBNet ID	Project Title	Principal Investigator	Submission Type	Status	Effective Date	
234602-1	SFID	Day		Work in progress		
242581-1	GIS Across the Curriculum	Leonard	New Project	Approved	06/02/2011	
250383-1	Kentucky Center for Clinical and Transla...	Maher	New Project	Approved	06/20/2011	

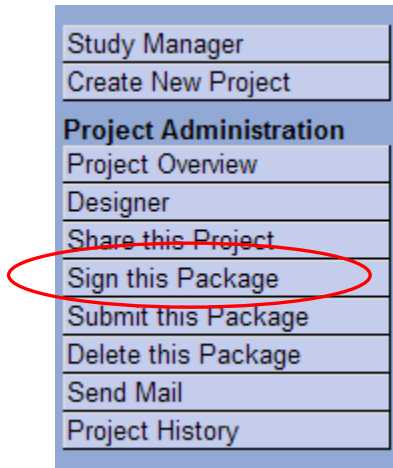
Once the package is open you can review the SFID by clicking on the “Designer” button on the left side navigation bar. (see picture below)



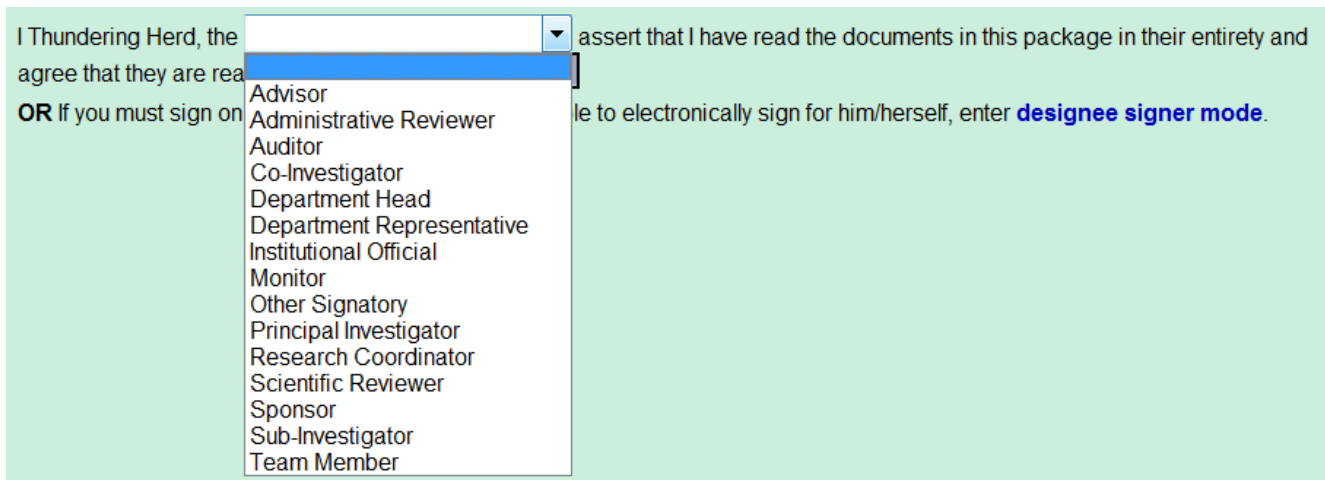
The “Designer” page will contain the Significant Financial Interest Disclosure (SFID) Form. To open the form click on the Document Type (in blue) **or** the paper symbol and the SFID will open.

Document Type	Description	Last Modified	
Significant Financial Interest Disclosure	Significant Financial Interest Disclosure	09/12/2011 03:25 PM	  

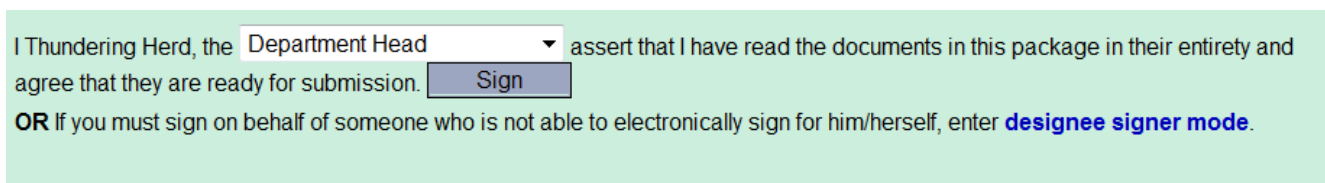
Once you have reviewed the SFID and are ready to sign just click on the “Sign this Package” button on the left side navigation bar. (see picture below)



A drop down box will appear to the right and you should select your status on this package (i.e. Department Head, Department Representative, Other Signatory, etc.). (see picture below)



Once you have selected your role you will click the “Sign” button.



You will now see that the package has been electronically signed.

This package has been signed by:

Date	Message
08/02/2011 10:51:04	Signed by Thundering Herd as Department Head
One Signature found.	