Table of Contents

2 Table of Contents
3 About this Document
4 Protocol Permissions
5 Permissions Tab
6 Assigning Additional Permissions
9 Departmental Contacts

Hyperlinks
The Table of content “text” has active hyperlinks. Click to jump to any page in this document.

Return to the Table of Content button
There is a “return” button at the bottom of every page to help you return to the Table of Contents.
This document provides the instructions on:

The Permission Tab in KC IRB.

Permissions determine which individuals can view and edit protocol information in KC IRB. Some permissions are automatically assigned by KC IRB, while some may need to be manually assigned by the study team or by HSO. The Permissions tab of the KC Protocol allows the study team to designate individuals to view protocol information and receive IRB notifications for the protocol.
**Protocol Permissions**

KC IRB Protocol > Permissions Tab

Study personnel are automatically assigned certain permissions based on the protocol role assigned to them on the Personnel tab. Principal investigators (PIs) and Co-PI Student/Fellow/Resident are automatically given permission to view information about the protocol, submit amendments and renewals for the protocol, request IRB actions, and receive IRB notifications (approvals, renewal reminders, etc) about the protocol. The person who created the protocol (called an aggregator) is assigned the same permissions as PIs and Co-PIs. All other research personnel (key and non-key personnel) are given permission to view the protocol only. They cannot make submissions, request IRB actions, or receive IRB notifications unless you give them specific permission to do so on the Permissions tab. Similarly, if there are additional individuals who are not a part of the study team who need to view protocol information, make submissions or request IRB actions, or receive protocol notifications, they must be designated on the Permissions tab.

<table>
<thead>
<tr>
<th>Protocol Role</th>
<th>Designated by</th>
<th>View Protocol Information</th>
<th>Make Submissions or Request IRB Actions via KC IRB</th>
<th>Receives IRB Notifications about the Protocol</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Investigator</td>
<td>Assigned in the Protocol tab at initial review; may be amended using the Personnel tab</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Co-PI Student/Fellow/Resident</td>
<td>Personnel tab</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Personnel tab</td>
<td>Personnel tab</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Key Interacting</td>
<td>Personnel tab</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Key, Not Interacting</td>
<td>Personnel tab</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Study Manager/Correspondent</td>
<td>Personnel tab</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Aggregator</td>
<td>Automatically assigned to the individual who creates the protocol</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Permissions Tab

Many of the permissions listed above are automatically assigned by the system and cannot be changed. However, if a member of the study team (not PI or Co-PI) or a non-study individual needs to view protocol information, submit amendments and renewals, request IRB actions, and receive IRB notifications, they can be given specific permission to do so via the Permissions tab. Updates to the Permissions tab may be made at any time and do not require an amendment.
Assigning Additional Permissions

KC IRB Protocol > Permissions Tab > Assigned Roles

If a member of the study team (not PI or Co-PI) or a non-study individual needs to view protocol information, submit amendments and renewals, request IRB actions, and receive IRB correspondence, designate them as a Study Manager/Correspondent on the Permissions tab. Individuals listed as the Aggregator have the same permissions as the Study Manager/Correspondent and there is no need to change their Role if the study contact is also the Aggregator.
Assigning Additional Permissions

KC IRB Protocol > Permissions Tab > Users Panel

On the Permissions tab:

1. In Users section:
   a. If you know the individual’s IU user name, enter it into the box in the User Name column. Skip to instruction 2 on the next page.
   b. To search for an individual, click on the
      i. Click Clear.
      ii. Search using the criteria available: last name or email address returns the best results. If only part of an email address or last name is known, you may enter * as a substitute for unknown letters. For example, if searching Smithwick, you could enter Smith* to return the same results.
      iii. Click Search.
      iv. Click the return value link associated with the appropriate person.
Assigning Additional Permissions

KC IRB Protocol > Permissions Tab > Users Panel

2. Click the drop-down button under Role and select Study Manager/Correspondent. DO NOT select Viewer, Aggregator, or Protocol Deleter.

3. Click add.

To remove a Study Manager/Correspondent:

1. Select the delete button under Actions to the right of the User Name and Role.

2. A question will appear: Are you sure you want to delete XXX, XXX XXX from the list of users?

3. Click yes.
Departmental Contacts

Department administrators can be given permissions to view the protocols assigned to their department. Once permission is given, administrators can view protocol information but cannot submit amendments and renewals, request IRB actions, or receive IRB correspondence. If you are a departmental administrator and would like to have this access, please contact kcirb@iu.edu for more information.