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# IRBMANAGER – USER GUIDE



Los Angeles County Dept. of Public Health  
Institutional Review Board

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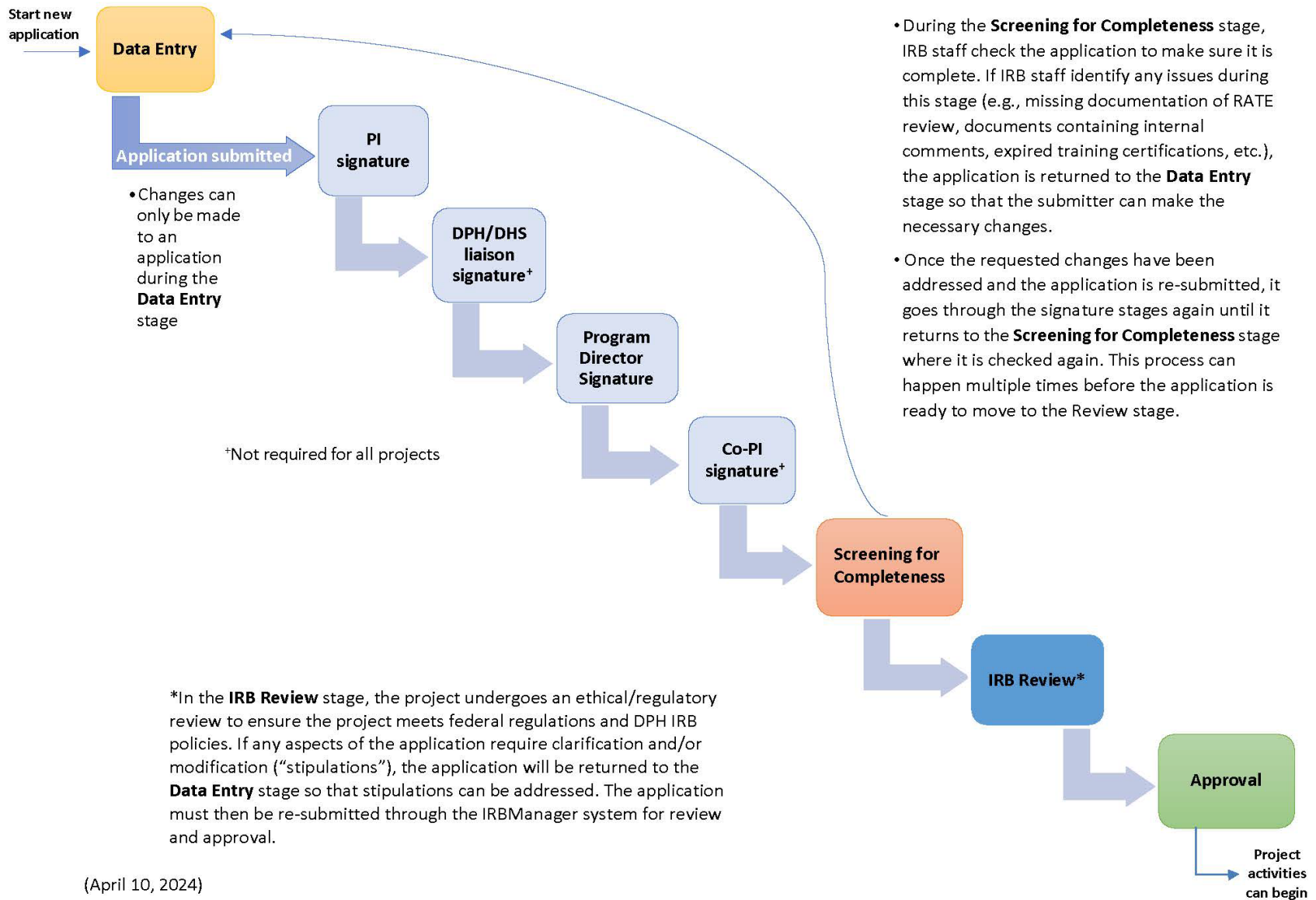
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# Overview of IRBManager application process



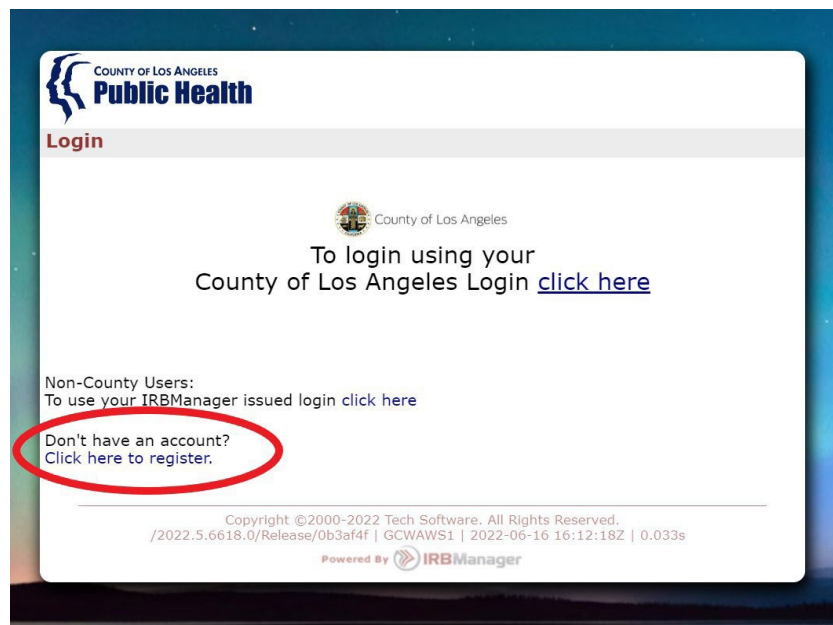
## Section 1: Accessing IRBManager

- Please click on the link below to access the IRBManager login page.

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



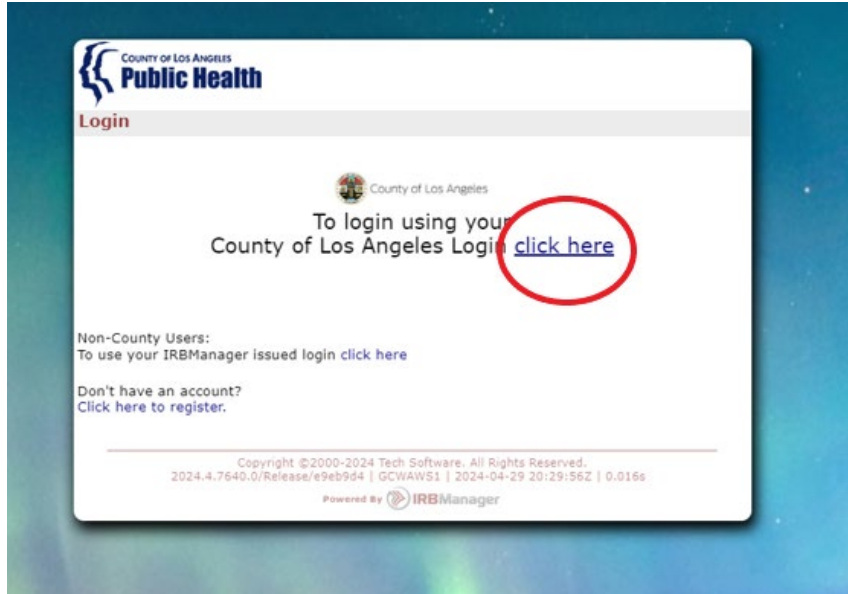
**New Users:** If this is your first time trying to log into IRBmanager and you are an LA County employee, please try logging into IRBManager using your County email address and password as a contact may already have been created for you. If you are not an LA County employee and/or a contact has not yet been created for you, you will need to register for a user name and password before you can access the system. Click on the link that says *Click here to register* (as indicated in the image below) and on the subsequent screens enter the required information to complete the registration process.



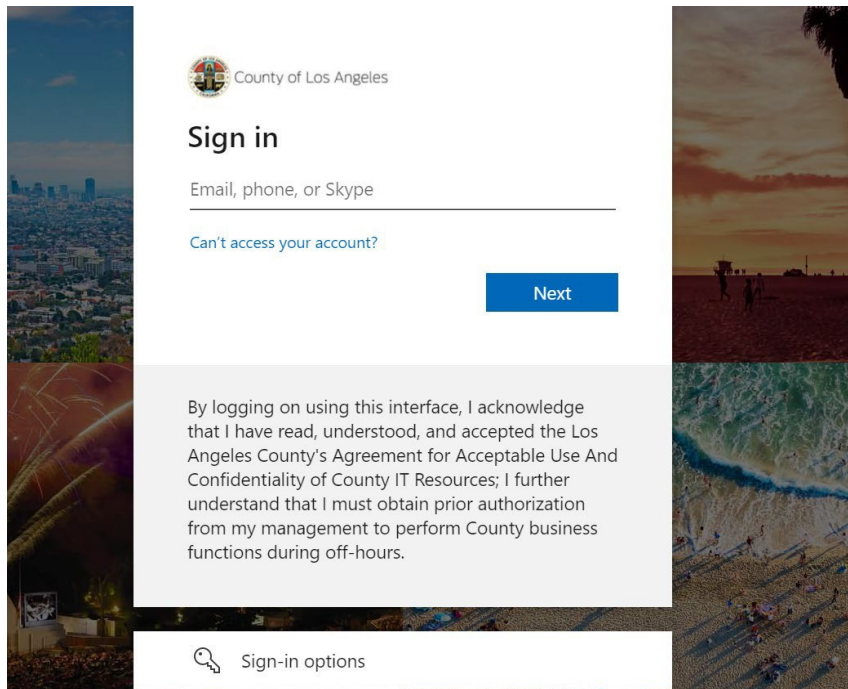
- If a contact was created for you (either by IRB staff or by someone working on an application), you do not need to complete the new user registration process again. You will receive an email notification when someone has created a contact for you. Proceed to the login page and use your email address as your username; make sure the email address matches the address that was used to create your contact. You will be prompted to enter a password.

## Logging in for LA County users

- Log in using your County credentials (email address and password).

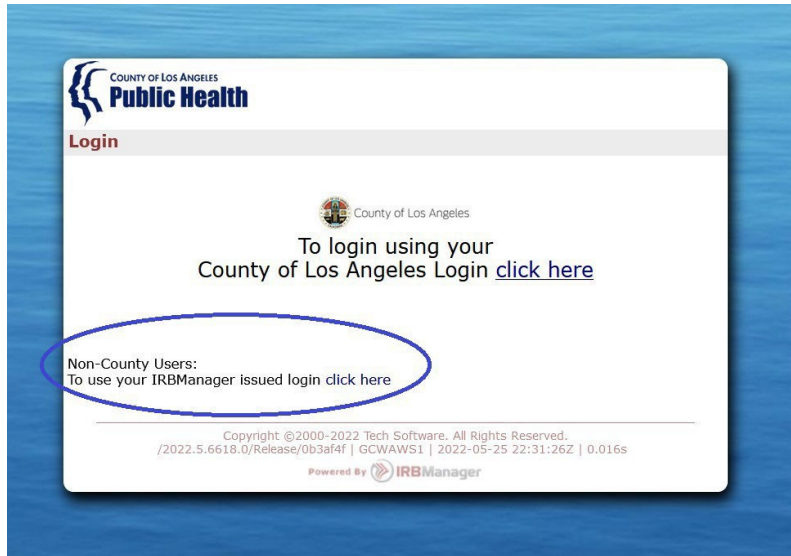


- Please follow the security prompts to successfully login.

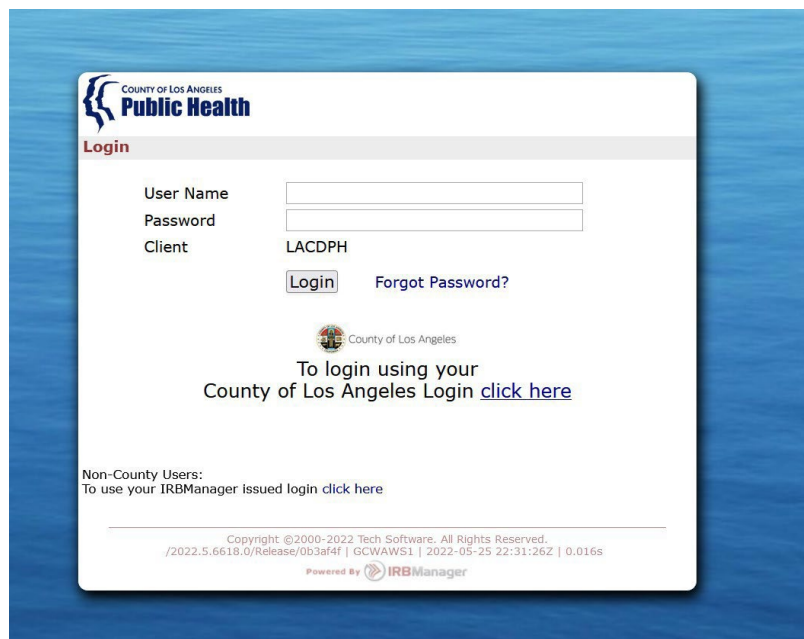


## Logging in for Non-LA County users

- Non-County users (i.e, users who are not County staff) will need to click on the link in the bottom left of the screen in order to log in (as indicated in the image below).



- On the next screen, you will need to enter your **User Name** and **Password**. If you need to reset your password, click on *Forgot Password?* and follow the steps to change your password.



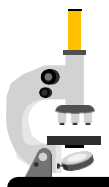


Please contact [IRB@ph.lacounty.gov](mailto:IRB@ph.lacounty.gov) if you encounter any trouble logging into IRB Manager. If possible, please include screenshots of any error messages to help IRB staff troubleshoot the issue.

## 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 images below, but the basic functions noted throughout this guide will be present.

- 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).



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



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

The screenshot shows a dashboard with a top navigation bar containing three tabs: IRB (3), xForms (2), and Events (12). Below the tabs are buttons for 'Search Projects', 'Export to Excel', 'Click here to start an IRB application', and 'Start Other xForm'. A secondary navigation bar includes tabs for '1 PI', '2 Point of Contact', and '1 Program Director'. The main content area displays three project cards:

- 2022-04-995-DPH**: Approved as exempt as non-research, Exp Exempt. PI: Kwon, Alysia. Description: Health Equity in Research, Evaluation and Other Data-gathering Activities.
- 2023-06-009-DPH**: Pending. PI: Kwon, Alysia. Description: Test2 for James Suh.
- 2023-10-004-DPH**: Approved as exempt as non-research, Exp Exempt. PI: Camarena, Paul. Description: Test.

A red arrow points to the IRB number '2023-10-004-DPH' in the third card. Below the project cards are tabs for 'Inactive Projects' with counts: 'PI 2', 'Co-Principal Investigator 2', and 'Research Associate 1'. A 'Notice' section on the right contains the text: 'Click on a project's IRB # to open the project details page'.

- The **xForms** tab lets you view any applications/reports you are currently working on. You can view forms that have already been submitted (but not yet approved) as well as forms that have been started but not submitted.

The screenshot shows the 'My Projects' dashboard with a top navigation bar containing three tabs: Reviews (0), IRB (4), and xForms (4). Below the tabs are buttons for 'Start xForm' and 'Export to Excel'. A secondary navigation bar includes tabs for '1 Unsubmitted' and '3 Being Processed At A Later Stage'. The main content area displays three project cards:

- Amendment application (Draft)**: Camarena, Paul. Data Entry. 2024-01-008-DPH. Camarena, Paul. Started on 05/02/2024 at 2:10 PM PT.
- IRB Application**: Camarena, Paul. Vice Chair review. Initial Submission. 2024-05-003-DPH. As of 05/06/2024 at 3:31 PM PT.
- IRB Application**: Kwon, Alysia. Office screening. Camarena, Paul. As of 06/09/2022.



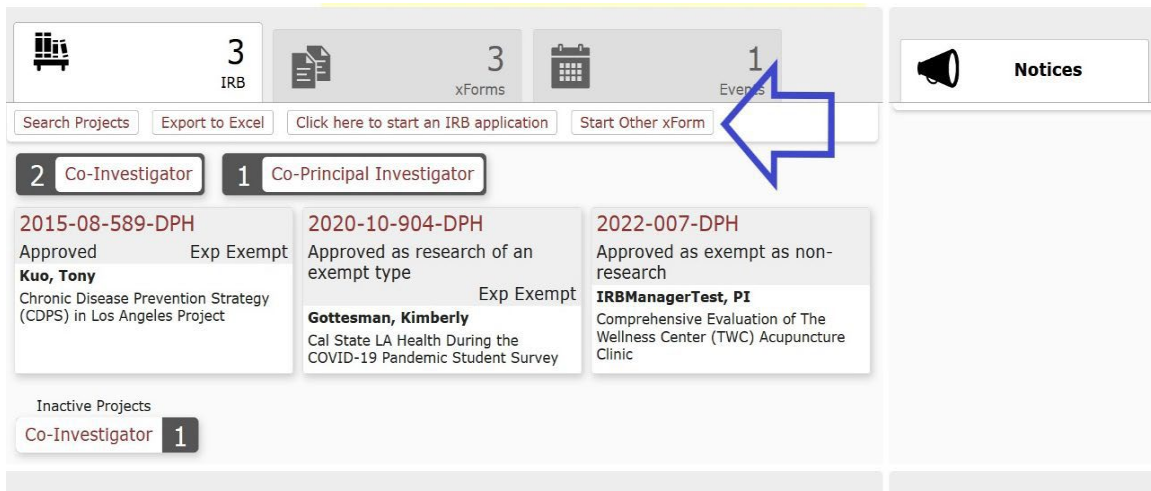
- The **Events** tab lets you view any items that require your attention such as Annual Continuing Review due dates or expiration dates for studies whose approval period is coming to an end.

The screenshot shows the 'Events' tab interface. At the top, there are three main categories: IRB (4), xForms (4), and Events (12). Below these are several filter tiles: PI (1), Amendment (2), Annual Progress Report (1), Continuing Review (1), NHSR Submission, and Reportable Events (1). The main content area displays a grid of event tiles. The first row includes: Initial Submission (2024-03-003-DPH, 03/13/2024, Romo, Tiffany), Reportable Events (2022-04-995-DPH, 10/27/2023, Kwon, Alysia), and Initial Submission (2023-05-011-DPH, 05/25/2023, Moore, Kim). The second row includes: NHSR Submission (2023-04-004-DPH, 04/10/2023), Initial Submission (2022-12-006-DHS, 12/29/2022), and Initial Submission (2022-05-998-DPH, 10/20/2022).

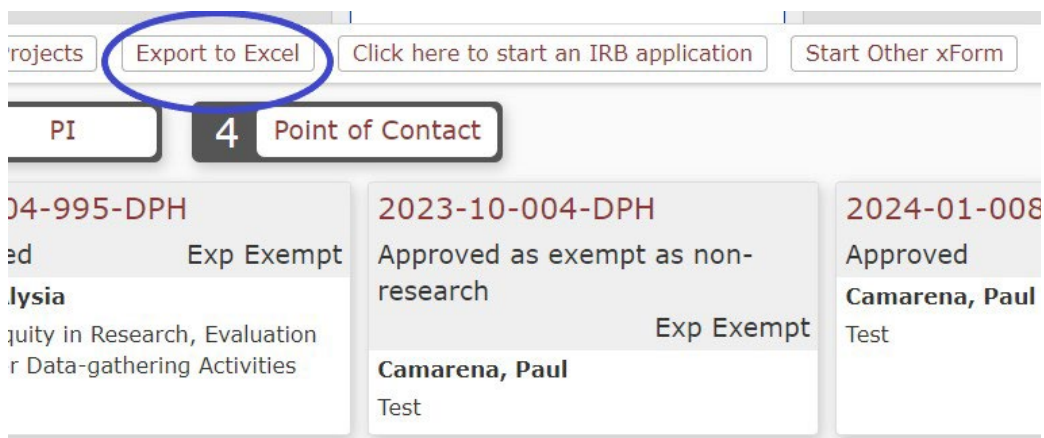
- The tiles indicated in the screenshot below are filters that allow you to view certain projects depending on the filter. Different filter tiles will be available depending on the tab that is selected. In the image below, the IRB tab is selected and the filter tiles let you filter your projects by your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

The screenshot shows the 'IRB' tab interface. At the top, there are three main categories: IRB (3), xForms (3), and Events (1). Below these are several filter tiles: Co-Investigator (2) and Co-Principal Investigator (1). A blue arrow points to the Co-Principal Investigator filter. The main content area displays project tiles. The first row includes: 2015-08-589-DPH (Approved, Exp Exempt, Kuo, Tony, Chronic Disease Prevention Strategy (CDPS) in Los Angeles Project), 2020-10-904-DPH (Approved as research of an exempt type, Exp Exempt, Gottesman, Kimberly, Cal State LA Health During the COVID-19 Pandemic Student Survey), and 2022-007-DPH (Approved as exempt as non-research, IRBManagerTest, PI, Comprehensive Evaluation of The Wellness Center (TWC) Acupuncture Clinic). Below this is an 'Inactive Projects' section with a Co-Investigator filter (1).

- 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.



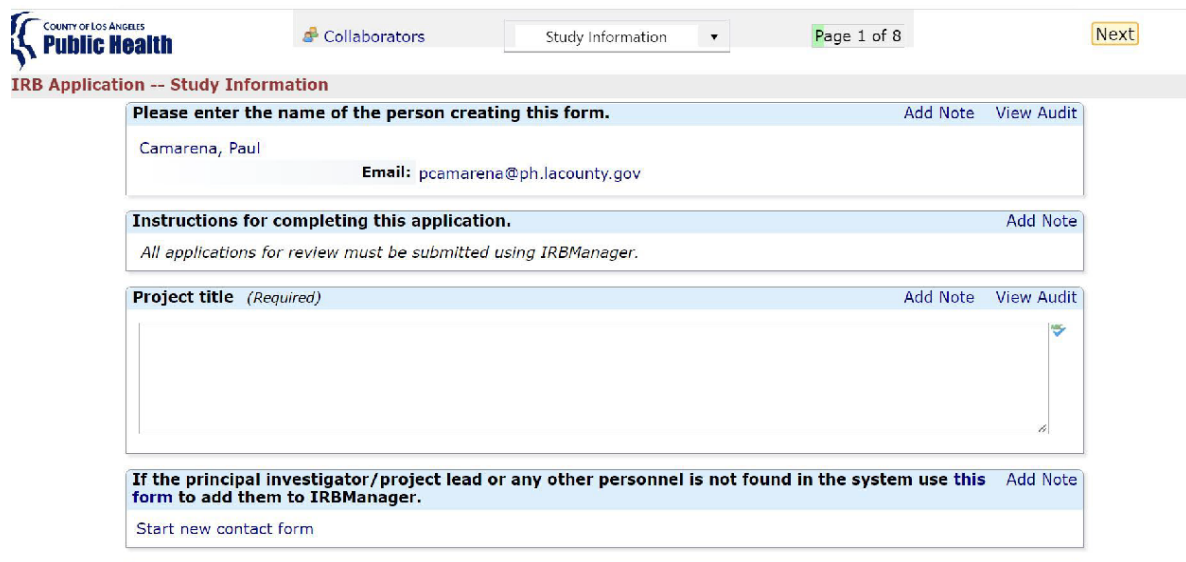
## SECTION 3. SUBMITTING A NEW IRB APPLICATION

- 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).



The screenshot shows a dashboard with several navigation elements. At the top, there are three main tabs: 'IRB' with a count of 3, 'Forms' with a count of 3, and 'Events' with a count of 1. Below these tabs is a search bar with buttons for 'Search Projects', 'Export to Excel', 'Click here to start an IRB application' (circled in blue), and 'Start Other xForm'. Below the search bar are two buttons: '2 Co-Investigator' and '1 Co-Principal Investigator'. The main area contains three project cards. The first card is for '2015-08-589-DPH', approved by 'Kuo, Tony' for a 'Chronic Disease Prevention Strategy (CDPS) in Los Angeles Project'. The second card is for '2020-10-904-DPH', approved by 'Gottesman, Kimberly' for a 'Cal State LA Health During the COVID-19 Pandemic Student Survey'. The third card is for '2022-007-DPH', approved by 'IRBManagerTest, PI' for a 'Comprehensive Evaluation of The Wellness Center (TWC) Acupuncture Clinic'. At the bottom left, there is a section for 'Inactive Projects' with a '1 Co-Investigator' button. On the right side, there is a 'Notices' section with a megaphone icon.

- A new page will open with a blank IRB application. Please enter the required information and upload supporting documents in the spaces provided.





The screenshot shows the 'IRB Application -- Study Information' form. At the top left is the 'COUNTY OF LOS ANGELES Public Health' logo. To the right are 'Collaborators', 'Study Information' (dropdown), 'Page 1 of 8', and a 'Next' button. The form has several sections:

- Please enter the name of the person creating this form.** (Add Note View Audit)  
Camarena, Paul  
Email: pcamarena@ph.lacounty.gov
- Instructions for completing this application.** (Add Note)  
All applications for review must be submitted using IRBManager.
- Project title (Required)** (Add Note View Audit)  
A large text input field for the project title.
- If the principal investigator/project lead or any other personnel is not found in the system use this form to add them to IRBManager.** (Add Note)  
Start new contact form



- 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 needed. You can delete existing attachments by clicking on the red “X” next to the attachment.

Other

**Please attach your HIPAA training certificate** *(Required)*

  TEST.docx HIPAA training certificate

- 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 those questions. If you would like to navigate between the different pages of the application without answering all required questions on a page, you can use the dropdown menu at the top of the page (as indicated in the image below).

 Collaborators Study Information  Page 1 of 7

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**Please enter the name of the person creating this form.** Add Note View Audit

Camarena, Paul

**Email:** [pcamarena@ph.lacounty.gov](mailto:pcamarena@ph.lacounty.gov)

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**Instructions for completing this application.** Add Note

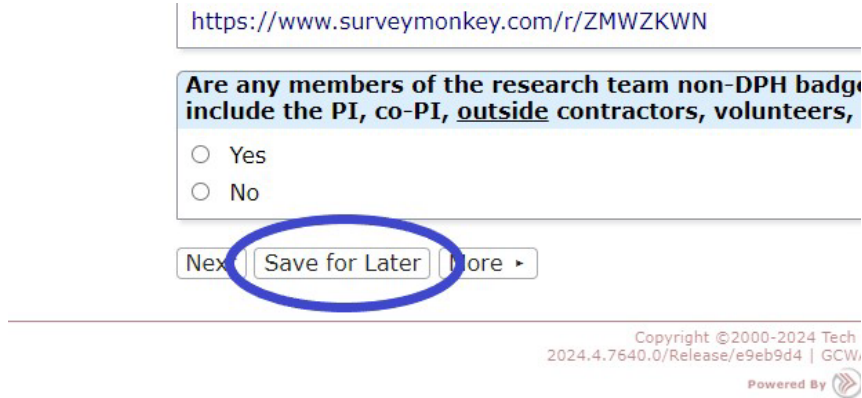
*All applications for IRB review must be submitted using IRBManager. Applications not submitted within 60 days will automatically be closed. If you would like to navigate between pages of the application without completing all required questions on each page, please select the desired page from drop-down menu at the top of the application.*

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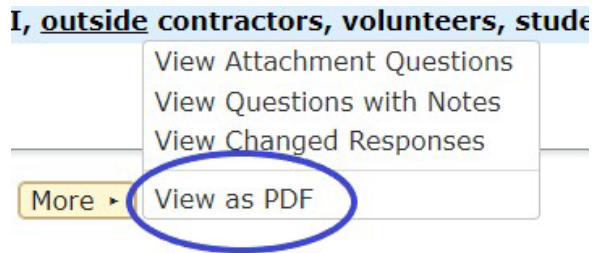
**Project title** *(Required)* Add Note View Audit

- Clicking on 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.



## SECTION 4. CREATING A NEW CONTACT

- Each person who will be added to an application must have a contact in the IRBManager system. 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
	<a href="#">Create new contact</a>	Create new contact
	<a href="#">IRB Application</a>	IRB Application

- Enter the required information and click “Next” at the bottom of the xform to submit the new contact request.

**Create new contact -- New contact details**

**Form creator** [Add Note](#) [View Audit](#)

Camarena, Paul

**Email:** [pcamarena@ph.lacounty.gov](mailto: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)**

- To create a contact from an open application, you can click on the “Start new contact form” button which is found just before the section where you are asked to name the Principal Investigator (PI)/project lead for the project. You can click this button multiple times if you need to create multiple contacts.

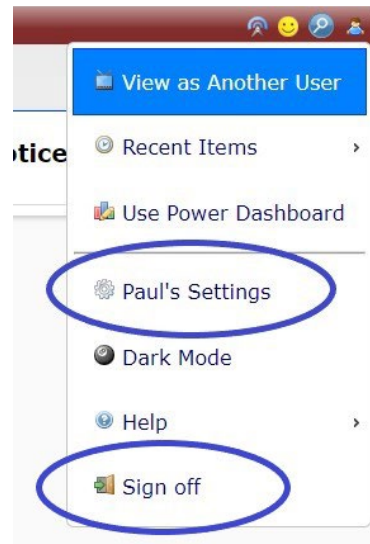
**Project title** *(Required)*

[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 xform to submit the new contact request.

## 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.





## SECTION 6. CREATING AMENDMENTS, ANNUAL STATUS REPORTS, AND ANNUAL CONTINUING REVIEW REQUESTS

- From your Dashboard, select the project for which you are submitting an amendment.

1 IRB      0 xForms

Search Projects    Export to Excel    Click here to start an IRB application

Start Other xForm

1 Coordinator    **Click here to view project details**

**2018-10-771-DPH**  
 Approved as research of an exempt type    Exp Exempt  
**Kuo, Tony**  
 Proposition 56 Evaluation Activities, Objectives 1,2,3,& 5



**Please note:** If the project for which you would like to submit an amendment, annual status report, or annual continuing review request is not in the system, please contact the IRB.

- On the *project details* page, click on “Start xForm” from the left- hand side.

Project-Site    Project 2018-10-771-DPH (IRB)    Help

Update

Add Attachment

Add Contact

Add Event

Add Note

Add Related Project-Site

Expirations

Generate Doc

Send Email

**Start xForm**

Misc

Contact History

Doc Templates

Notifications

Run Project Report

Run Project-Site Report

Project Audit

Project Sub Screen

Project-Site Audit

Department:    Agent Types:

Title: Proposition 56 Evaluation Activities, Objectives 1,2,3,& 5    Year: 2022

Consent Waiver:    Continuing review justification:

Review:    Exempt 45 CFR 46.104(d)(

Program:    Categories:

Use of Minors    HIPAA Waiver:

Language:    Purpose of the study (for letter):

Project-Site    Vulnerable populations:

Site(s): DPH - Department of Public Health    PI: Kuo, Tony

Status: Approved as research of an exempt type    Additional: N

Approval: September 30, 2021    Expiration: Exempt

Initial Approval: September 30, 2021    Other Expirations: Annual Progress R

Continuing    09/29/2022

- On the next page, select either “Amendment application” or “Annual Progress Report” to begin the desired xForm.



Start Form on Project-Site 2018-10-771-DPH

Select xForm to start		
Action	Form (Click to start)	Description
	Amendment application	Amendment application
	Annual Progress Report	Annual Continuing Review/Progress Report

Select the desired xForm



- Complete the desired application by responding to all questions and uploading all required documents. When you reach the end of the application, click “Submit” to move the xForm to the next stage.

## SECTION 7. DELETING XFORMS

- xForms can only be deleted during the *Data Entry* stage (i.e., prior to being submitted for review). To delete an xForm, click on the xForms tab and then select the “unsubmitted forms” filter.
- Scroll your mouse on the xForm you would like to delete and click on the red “X” to complete the deletion (shown below).

The screenshot shows a dashboard with navigation tabs: Home, Meetings, Create Project, Reports, Contacts, Administration. Below the tabs are summary cards for IRB (4), xForms (10), and Events (2). A 'Notices' bell icon is also present. The main content area shows a list of xForms with filters for 'Unsubmitted' (8) and 'Being Processed At A Later Stage' (2). One xForm is highlighted: 'Amendment application' by Kuo, Tony, in the 'Data Entry' stage. A red 'X' icon is circled in blue, and a red callout box points to it with the text 'Click here to delete xForm'.

## SECTION 8. UPLOADING DOCUMENTS AS ATTACHMENTS

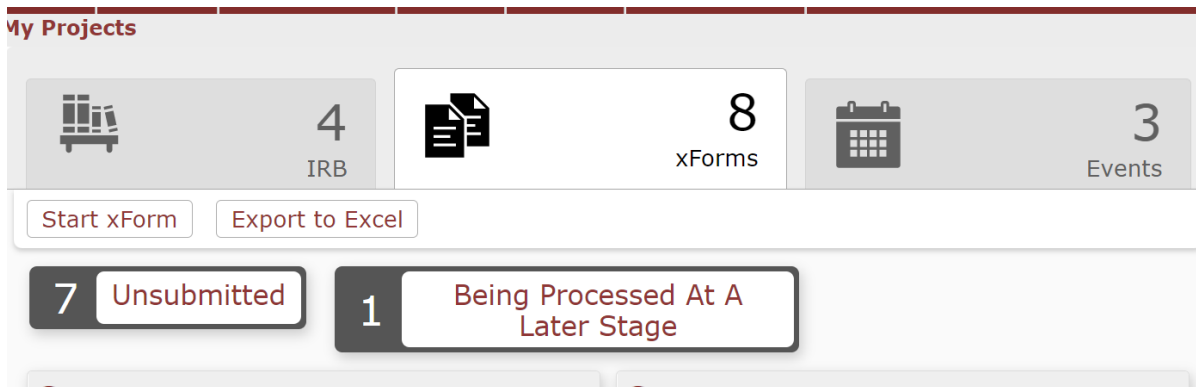
- Each attachment should only contain one document type (e.g., recruitment letter, informed consent document, survey, etc.) For instance, when uploading data collection materials, do not include or attach consent or recruitment documents.
- If more than one type of data collection materials will be used (e.g., a survey, an interview script, etc.), upload each document separately.
- Please follow these instructions for attaching documents in xForms:
  - Click the Add Attachment button to open a pop-up window on screen
  - Click Select files to browse for the document you wish to attach
  - Click the Attach button - 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 pre-review or IRB review process with a request for additional information and/or revisions.
- An email will be sent to the xForm creator and study PI/project lead informing them that their application is being sent back for additional information and/or revisions.
  - 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.
  - Items that require attention can be viewed by selecting the xForms tab and then clicking on the “Awaiting your Attention” filter.
- Once revisions are completed, please sign and submit the application to move it on 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.

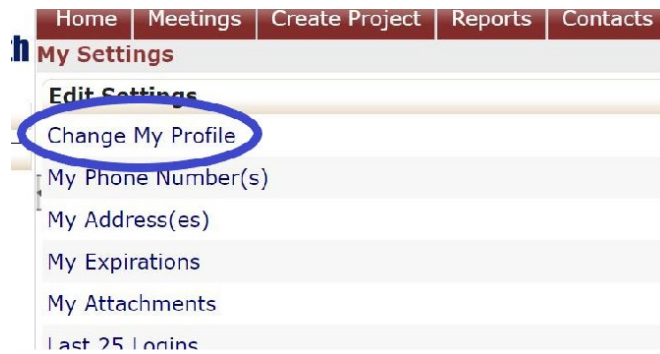


- Next, select the “Being Processed At A Later Stage” filter tile (see the image above). This will filter your existing xForms to display projects that are in a stage of review by the IRB and do not require your immediate attention.
- Clicking on the “Unsubmitted” filter tile will filter your existing 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” (see image below).

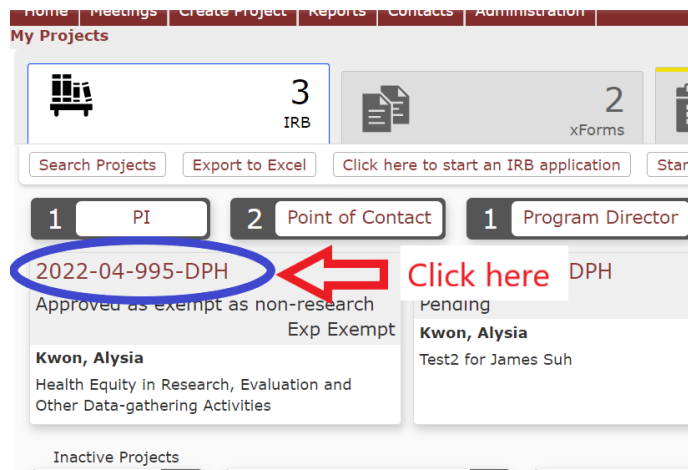


- On the *Change My Profile* page (see image below), please make sure your name, degree, and email address are correct. If you need to make corrections, update your information on this page and then click the “Update” button at the bottom of the page.

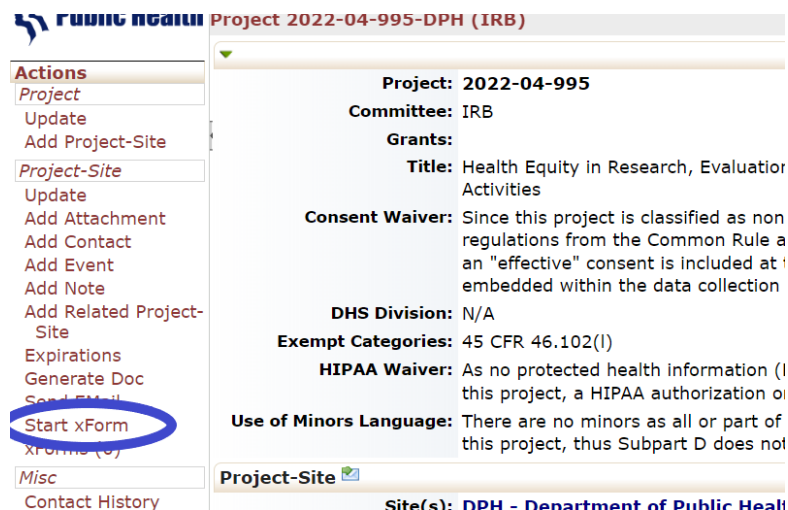
A screenshot of the 'My Profile' page in a web application. The top navigation bar includes Home, Meetings, Create Project, Reports, Contacts, and Administration. A search bar on the right says 'Find Project (Ctrl+Q)'. Below the navigation bar, the page title is 'My Profile' and there is a 'Help Paul's Set' link. The main content area is titled 'User Information' and contains two columns of form fields. The left column includes: 'Prefix (Mr, Dr, etc):' with a yellow input field; 'Middle Name:' with an empty input field; 'Suffix (Jr, III, etc):' with an empty input field; and 'Specialty:' with an empty input field. The right column includes: 'First Name:' with 'Paul' in the input field; 'Last Name:' with 'Camarena' in the input field; 'Degree:' with 'MPH' in the input field; 'Email Address:' with 'pcamarena@ph.lacounty.g' in the input field; and 'From Address for Outbound Email:' with an empty input field. A blue arrow points from the 'Last Name' field towards the 'Update' button. At the bottom of the form, there is an 'Update' button.

## Section 12. Reporting an Unanticipated/Adverse Event

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



- On the study 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 forms. Please select the “Unanticipated/Adverse Events Form” by clicking on the hyperlink to open the form.



- Respond to the questions in the form and click “Submit” at the bottom of the page.

