

How to add a Collaborator to an IRB application

As the preparer/submitter of an IRB application, you may want another person to give you feedback before you submit the application to the IRB.

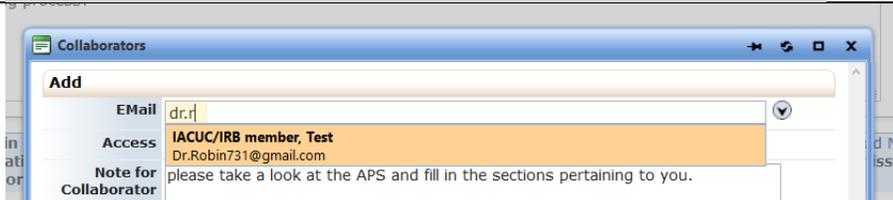
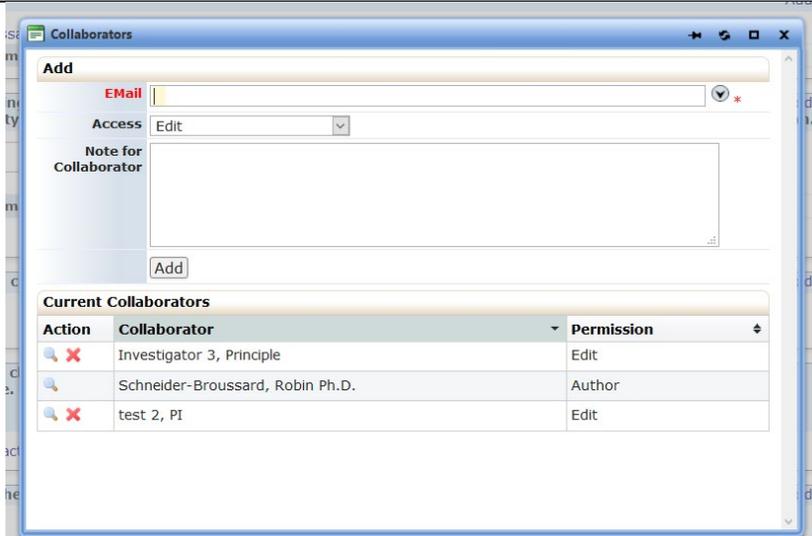
NOTE – PI's and Co-PIs will NOT automatically have viewing rights while the application is being completed, unless they are the person who started the APS. Only the person who started the application has viewing and editing rights.

To add a collaborator and give them viewing or editing rights

click  Collaborators at the top of the application form near the navigation dropdown.

The collaborator window will pop open.

Begin typing their name or email address in the box next to "Email". Select the person to add.



Skip the "Add Contact" steps, if the name appears.
 If the desired name does not appear, go back to the first page of the application form and click **Create new contact.**

Please choose any additional personnel involved in this project. [Add Note](#) [View Audit](#)
NOTE - if the submitter is not the PI, but is research staff, please list here.

Co-PI
 Graduate Student
 Undergraduate Student

NEW Contacts - click link below to add. Be sure to click "Next" and "Submit" within the Add Contact form to ensure adding the contact to IRBManager.

Wait one minute. Then use the fields below to add them.
 Create new Contact 

Click save at the end of each row.

Co-Investigator - Faculty	Action
<input type="text"/>	Save

The Add Contact Form will open.

Add Contact Form -- Contact Info

Submitter [Add Note](#) [View Audit](#)
 test 2, PI
 Email: pitest2@louisiana.edu Business: 337-482-1419

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

Prefix [Add Note](#) [View Audit](#)

First Name (Required) [Add Note](#) [View Audit](#)

Middle initial [Add Note](#) [View Audit](#)

Last Name (Required) [Add Note](#) [View Audit](#)

Degree [Add Note](#) [View Audit](#)

Phone Number (Required) [Add Note](#) [View Audit](#)

Provide the required information.

Contact Info

Submitter
 Schneider-Broussard, Robin Ph.D.
 Email: C00255930@louisiana.ec

Please enter the email address for the user y

Prefix

First Name (Required)

Middle initial

Last Name (Required)

Degree

Phone Number (Required)

NOTE - The last question on the contact form allows you to choose if

the person will be able to login to the system. Selecting “yes” will send an email to them for changing their password.

To be listed as a collaborator, a login is needed.

Do you want this person to be able to login to the system to view documents? (Required)

- Yes
- No

NOTE – for contacts who do not need to view the form but need to be listed as PIs on the form, select No. They will not receive an email.

Click “Next,” and “Submit” to add the person to the IRBManager system.

Wait 1-2 minutes and go back to “Collaborators” to add them. **Note** - the collaborator does not need to be listed as a project personnel to be added as a collaborator.

Do you want this person to be able to login to the system to view documents? (Required)

- Yes
- No

Click "Next." Then click "Submit" to add the contact to the database. Once you click submit information will be added into the system to create a user profile. An email will be sent to they have access to the system.

Next Save for Later More >

Form Completed

You've completed the form. You can now either save the form for later revision, or submit it.

Go Back Save for Later Print Submit

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After selecting the person to add as a collaborator, chose the type of access you would like to give to the collaborator. “**Edit**” will allow them to modify the answers to questions. “**View Only**” will allow them to read and leave notes, but not edit the content in the answers to the questions.

Each person can have different rights.

Note – a Login password is required to open the form that they are collaborating on. If you add someone who does not have a login, please contact ORI to have a login email sent to them or tell them to use their email address and select “forgot password” to get a password setup.

Action	Collaborator	Permission
	Schneider-Broussard, Robin Ph.D.	Author
	Test4, PI	Edit
	Test5, PI	Edit

The collaborator will receive an email notifying them that they have been added as a collaborator. The link to the application will be provided in the email.

As a collaborator, they will only be able to see the application that you gave them access to. If they need to view other applications of yours, please repeat the steps in each application.

Robin Schneider-Broussard has invited you to collaborate on Animal Procedure Statement. >

Schneider-Broussard, Robin Ph.D. <robin.broussard@louisiana.edu> to Dr.Robin731

11:20 AM (1 hour ago) ☆ ↶ ⋮

Test,
Schneider-Broussard, Robin Ph.D. has invited you to collaborate on a Animal Procedure Statement xForm.
Additional comments were:
please review and add comments as needed.
You can access the xForm from your dashboard, or directly at <https://ull.my.irbmanager.com/xForms/d765cdde-c771-4d6f-87b1-000ff315456>

↶ Reply ↷ Forward



They will also be able to see it on their IRBManager home page.

The screenshot shows the IRBManager dashboard. At the top, there are icons for 'Start New APS' and 'Start Other xForm'. Below that, a notification bar says '1 Awaiting Your Attention'. A card for 'Animal Procedure Statement' is visible, showing 'APS data entry' by 'Schneider-Broussard, Robin Ph.D. (C00255930)' started '53 minutes ago'. On the right, a summary box for 'xForms (0 Active)' lists: '0 unsubmitted xForms', '0 xForms being processed at a later stage', and '1 xForms awaiting your attention'. Below that, a section for 'My Projects (0 Active)' is shown. Yellow arrows point to the notification bar and the xForm summary box.

The collaborator will need to login.

If they are already users of the system, they will click the appropriate link for either non UL login or UL login.

If they are not users of the system, but were designated as a collaborator, they can use the IRBManager issued login and "forgot password" to get a password set up.

The screenshot shows the University of Louisiana Lafayette login page. It features the university logo and the text 'UNIVERSITY of LOUISIANA LAFAYETTE'. Below the logo, there is a 'Secure Login' button. Two links are provided: 'To login using your ULID username and password click here' and 'To use your IRBManager issued login click here'. Yellow arrows point to these links, with labels 'UL Login' and 'Other Login' respectively.

As a "view only collaborator," the collaborator can use the "Add Note" link to leave notes on specific questions. As a collaborator with editing rights they can change the text within the question answers.

The screenshot shows a question and answer thread. The question is: 'a) Please justify the use of the species/strains listed above by explaining the characteristics that make it uniquely suited for these experiments. When available, please provide literature references and/or data that support this species selection for the experiment (consider characteristics like species size, physiology, relevance to health, and distance to the environment or ecology)'. There are two answers: 'Entered: 11/25/19 By: IACUC member, Test Internal: No please justify why 5 are needed' and 'Entered: 11/25/19 By: IACUC member, Test Internal: Yes ok with changes'. A yellow arrow points to the 'Add Note' link above the first answer.

To view the changes made by each person, click “View Audit” for any question.” The “View Audit” window for the question will open.

The screenshot shows a 'View Audit' window with a table of changes. A yellow arrow points to the 'View Audit' button in the top right corner of the window.

When / Who	Change
2/29/2020 2:57:47 PM pitest4@louisiana.edu	Check to see when the PI and the Study director can see the form during development. Do they need to be added as collaborators during the writing process? Proving PI and Study director with view manage edit rights seems to be more amenable to our processes. pitest5 only could see when added as a collaborator, even though listed as a study director which is given view, edit, manage rights. pitest4 can edit even though they were not given the rights when making the contact.
2/29/2020 2:50:48 PM pitest5@louisiana.edu	Check to see when the PI and the Study director can see the form during development. Do they need to be added as collaborators during the writing process? Proving PI and Study director with view manage edit rights seems to be more amenable to our processes. pitest5 only could see when added as a collaborator, even though listed as a study director which is given view, edit, manage rights.
2/29/2020 2:14:40 PM pitest2@louisiana.edu	Check to see when the PI and the Study director can see the form during development. Do they need to be added as collaborators during the writing process? Proving PI and Study director with view manage edit rights seems to be more amenable to our processes.
2/29/2020 1:23:16 PM C00255930	Check to see when the PI and the Study director can see the form during development. Do they need to be added as collaborators during the writing process?

If multiple people are editing at the same time, you will not be able to see the changes made by others until “Next” or “Save for Later” at the bottom of each page is clicked by the person making the changes

The screenshot shows a navigation bar with three buttons: 'Next', 'Save for Later', and 'More'.

and you refresh your web browser.

The screenshot shows a web browser's address bar and navigation icons. A yellow arrow points to the refresh icon.