

Create a Protocol

Important: Only the Principal Investigator can initiate the creation of a new protocol. A protocol can be later edited, and submitted by a Principal Investigator, Co-Principal Investigator, Lab Supervisor, or Study Coordinator. *However, before the protocol can be submitted, only the Principal Investigator must log into the system and check the appropriate box in the Certifications section of the protocol.* This requirement serves as an electronic signature from the PI.

1) Log into [eProtocol](#) with your Net ID & password.

Welcome to Notre Dames's eProtocol for IBC Submissions

Important tips for success in eProtocol:

- Use **Mozilla Firefox** or **Chrome** (for PC) or **Safari** (for Mac) as your web browser
- Make sure your browser's pop-up blocker is **turned off**
 - For Firefox: Go to Menu → Options → Uncheck the **Block pop-up windows box**
 - For Safari: Go to Safari → Preferences → Uncheck the **Block pop-up windows box**
 - For Google Chrome: Click More ⋮ → Settings → At the bottom, click Advanced → Under "Privacy and Security", click Site Settings → Pop-ups and redirects → **Allowed**
- **AVOID using the back button.**
- Save your work by clicking the save button at the top of your protocol.

2) Click on the **Create Protocol** button to start a new application

eProtocol » Investigator » Home



3) Enter your **Study Title** in the text box.

eProtocol » Investigator » [Home](#) » Create Protocol

Study Title

4) Select the IBC Form button.

5) Enter a **Principal Investigator (PI)**, as follows:

- Since the PI is the only one who can create a protocol, the name and email address fields will automatically populate.
- Enter in all the missing fields (title, phone, and department)
- Click **Create**.

6) If you would like someone else to finish the rest of the protocol application on your behalf, add that person in the Co-Investigator, Lab Supervisor, or Study Coordinator sections.

Principal Investigator*		
Name	Degree	Title
Zimmerman, Christina	<input type="text"/>	<input type="text"/>
Email *	Phone	Fax
nzimmer2@nd.edu	<input type="text"/>	<input type="text"/>
Department		
Select One		
Training Details		
No training data is available.		

Co-Investigator		Clear
Name	Degree	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email *	Phone	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
Department		
Select One		
Training Details		
		available.

Click on the binocular icon to add new personnel. You won't be able to type their information in manually.

Type in any of the first 3 fields to find the desired personnel. Then click **Find**.

Find User		Find
User ID:	<input type="text"/>	
First Name:	<input type="text"/>	
Last Name:	<input type="text" value="felde"/>	

Select User					OK
	User ID	User Name	Title	Department	Email
<input type="radio"/>	efelde	Felde, Eric			efelde@nd.edu

Select the user you wish to add by clicking on the radio button next to their name. Then click **OK**.

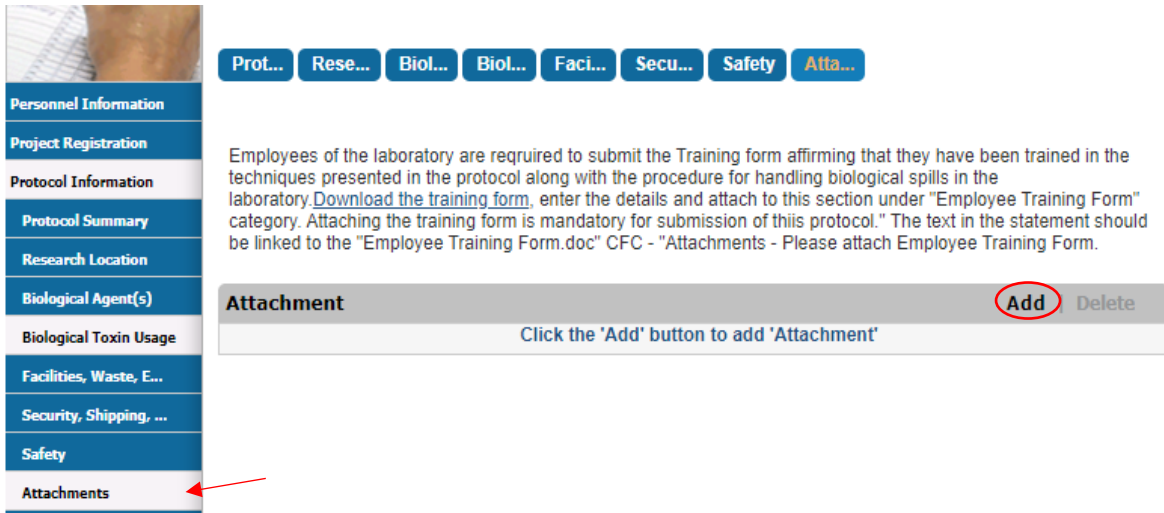
NOTE: There is a separate section to add **other personnel** working *hands on* with any materials listed on the IBC protocol, such as technicians or students. It is not necessary to add personnel who will **not** be working hands-on with materials listed on the protocol (i.e. statisticians). The IBC only reviews personnel working directly with hazardous biologics. Those listed under **other personnel** will be able to view the protocol but not edit it.

- 7) The first page of your application is the Personnel Information section. Complete screens from **Personnel Information** through **Certifications**.
- ✓ **Personnel Information**—use this section to add all members of the research team based on their individual roles
 - ✓ **Project Registration**—this form is to categorize what biohazardous materials you will be working with. Whichever items are checked on this list will determine which subsequent sections of the form will need to be answered.
 - ✓ **Protocol Information**— this navigation tab contains a sub-menu of different forms: Protocol Summary; Research Location; Biological Agents (if applicable); Recombinant DNA or Synthetic Nucleic Acid Molecules (if applicable); Biological Toxin Usage (if applicable); Animal (if applicable); Facilities, Waste and Equipment; Security, Shipping, Transport and Training; and Attachments.

- ✓ **Certifications**—this page ensures that you and the fellow research members comply and will abide by the rules and guidelines pertaining to the protocol and research being performed. **ONLY the PI can complete this page (refer to first important note at top of page 1).**
- ✓ **Check for Completeness**—use this feature to check for any unanswered questions before submitting the protocol. *Please refer to the eProtocol Quick Guide “Check Application for Completeness” if you have any questions.*
- ✓ **Submit Form**—when the protocol is finalized and all mandatory signatures have been received, the PI must click “**Submit Form**” in the left navigation menu.
- ✓ **Print View**—PDF versions of all sections of the protocol with or without comments can be generated with this tab. *Please refer to the eProtocol Quick Guide “PDF and Print a Protocol” for this step.*
- ✓ **Event History**—a catalog of dates in the life of the protocol and a list of all email correspondence from the system are listed here. Through this tab you can access the approved supplemental documents, approval letter and past PDF versions of the protocol to be printed or saved.
 - To navigate to the next section, click the **Next** button. The system will save your data every time you go to a new section. If you stay on one page for too long, the system may time out and you will lose your work. Be sure to click the **Save** button periodically at the top of the protocol.
 - You can closeout of the protocol at any time and access it again from the Investigator Homepage. Save the page you’re working on before closing the protocol. Then, click on the **Close** button to close out of the protocol.

Notes for Protocol Information Section:

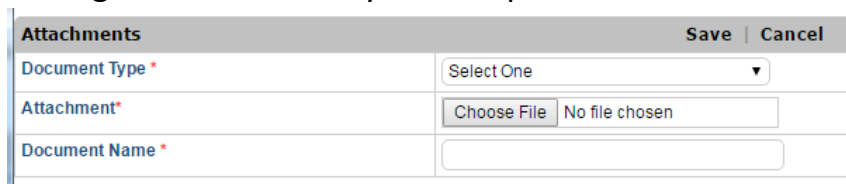
- In order to add an attachment, go to the **Attachments** tab on the top tab bar or the side menu bar and follow the following steps:
 - Click the **Add** button circled in the image below



The screenshot shows a web interface with a side menu on the left and a main content area. The side menu has several tabs, with 'Attachments' highlighted at the bottom and a red arrow pointing to it. The main content area has a top navigation bar with buttons for 'Prot...', 'Rese...', 'Biol...', 'Biol...', 'Faci...', 'Secu...', 'Safety', and 'Atta...'. Below this is a text block: 'Employees of the laboratory are required to submit the Training form affirming that they have been trained in the techniques presented in the protocol along with the procedure for handling biological spills in the laboratory. [Download the training form](#), enter the details and attach to this section under "Employee Training Form" category. Attaching the training form is mandatory for submission of this protocol." The text in the statement should be linked to the "Employee Training Form.doc" CFC - "Attachments - Please attach Employee Training Form.'

Below the text is an 'Attachment' management area with a table header 'Attachment' and two buttons: 'Add' (circled in red) and 'Delete'. Below the header is a text prompt: 'Click the 'Add' button to add 'Attachment''.

- In the pop-up window, use the drop down tab to select the **Document Type** and select the **Browse** button to navigate through documents on your computer.



The screenshot shows a pop-up window titled 'Attachments' with 'Save' and 'Cancel' buttons. It contains three fields:

Document Type *	Select One
Attachment*	Choose File No file chosen
Document Name *	

- Select the document you wish to attach and press **OK**.
- Click **Save** as your process is now complete.