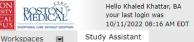
My Personnel Pool

• If you manage many studies with the same numerous study personnel, it's a good idea to create one or more personnel pools from your existing studies. These personnel pools can then be used later to be applied to new Study Application drafts in one click of a button and save you a ton of work.

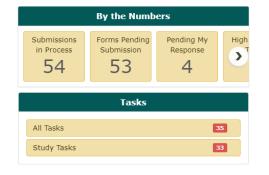
You can create your personnel pool in two ways:

- Option 1: If you have an existing study that has most or all personnel that you want in your "Personnel Pool", use this study to create your "Personnel Pool" (proceed to the next slide).
- Option 2 (from scratch): Create a new dummy/test Study Application draft; and when you reach Section "3.0 Grant Key Personnel access to the study", you can create your "Personnel Pool" (skip the next slides to slide # 9).







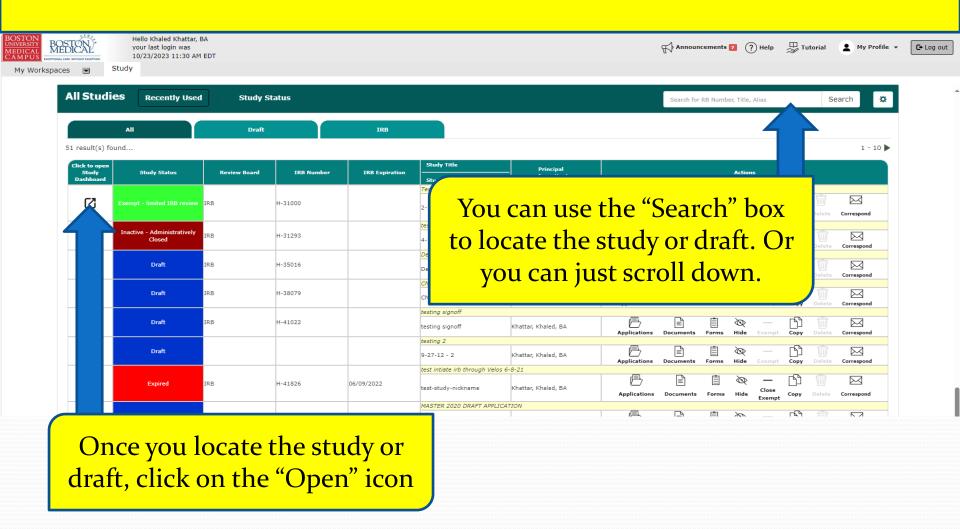


When you login into INSPIR II (https://inspir.bu.edu/), you will get to this page. This is your Home page

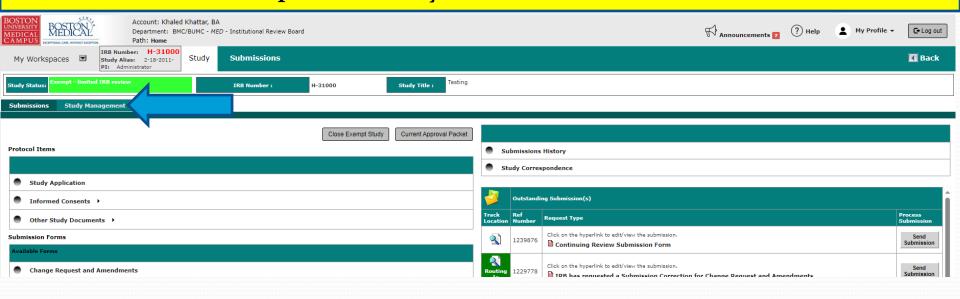
Click on "View and Manage My Studies"

The system will scroll your Home page down to the "All Studies" section.

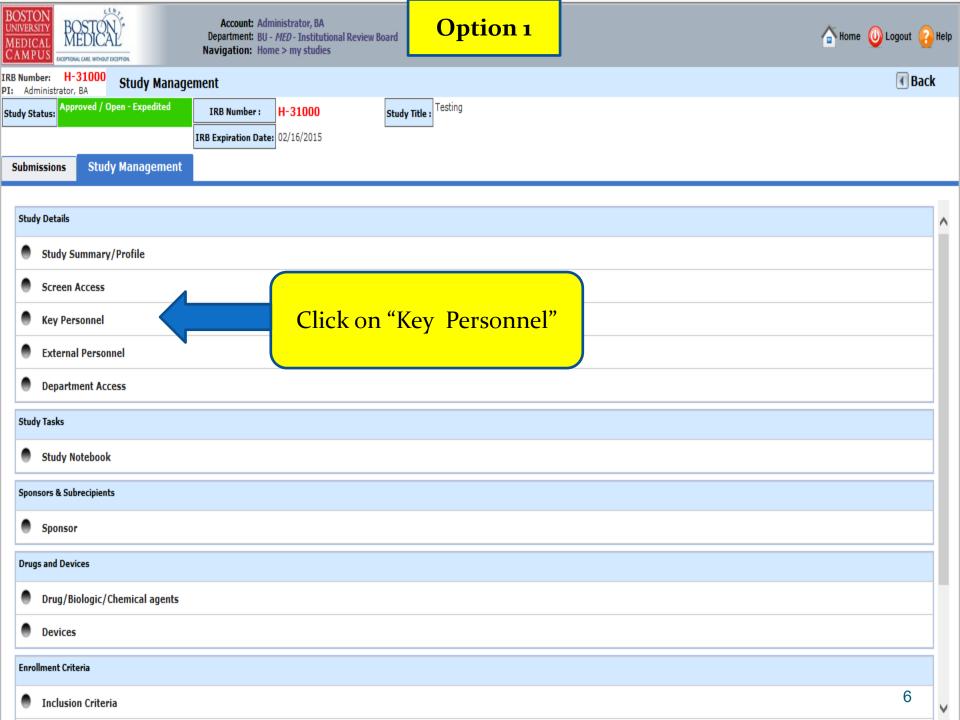
It's recommended that you pick an existing study that has the most completed list of personnel listed on it, to create your personnel pool.



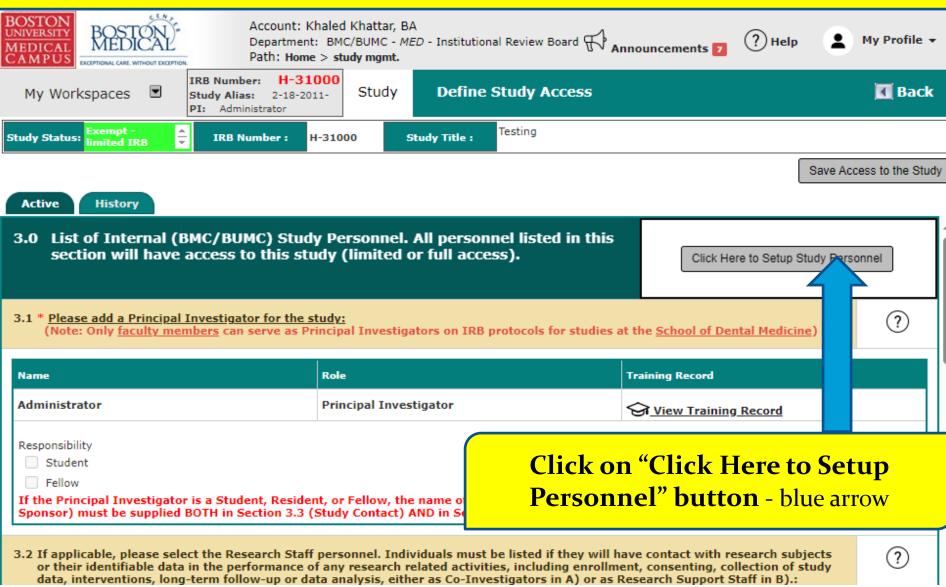
This opens the study into the "Submissions" tab.



Click on "Study Management"- blue arrow

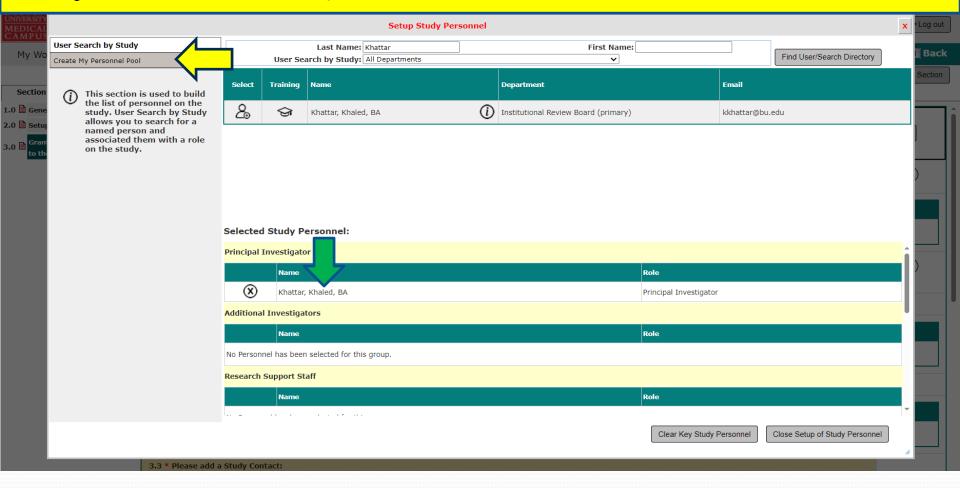


This opens the "Define Study Access" page.

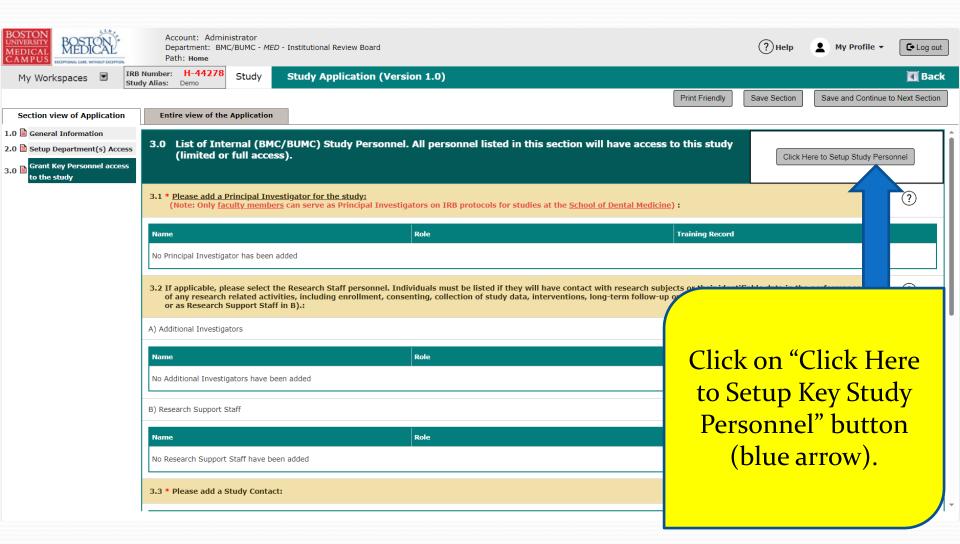


This will open the "Setup Study Personnel" popup.

- You will be creating a personnel pool based on the list of personnel and their corresponding roles that are listed on this study (green arrow)
- To create your personnel pool, click on "Create My Personnel Pool" (yellow arrow).
- Skip the next slides to slide # 14.

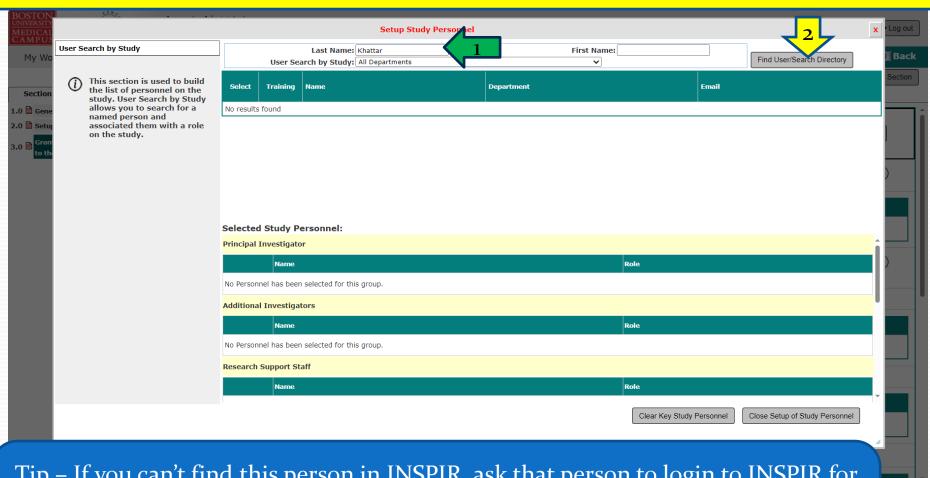


In a Study Application Draft, Section "3.0 Grant Key Personnel access to the study"



If you haven't already selected all personnel on this draft:

- 1- Enter the last name (green arrow)
- 2- Click on the "Find User/Search Directory" button (yellow arrow) to search for the person.

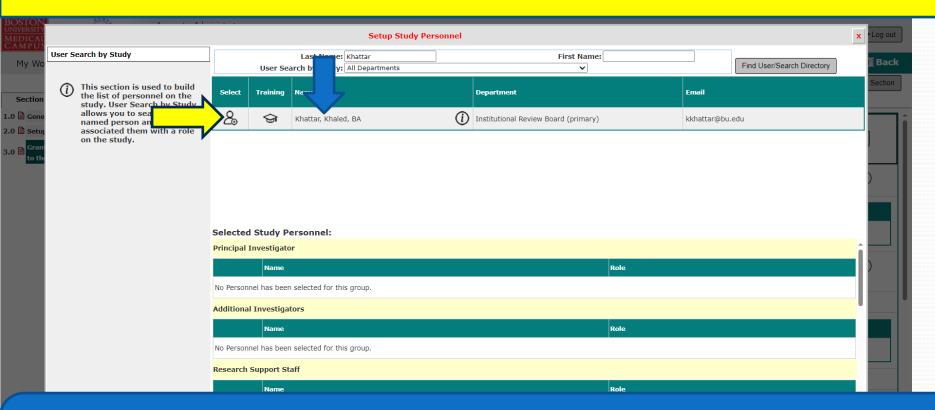


Tip – If you can't find this person in INSPIR, ask that person to login to INSPIR for the first time and their INSPIR account will be created. They can use the step-by-step instructions in the link below to login and create their INSPIR account:

http://www.bumc.bu.edu/irb/files/2016/10/Access-to-INSPIR.pdf

If the person you are looking for has an INSPIR account, their name will show up like in the screenshot below (blue arrow)

• Click on the "Select" icon (yellow arrow) to select this person.

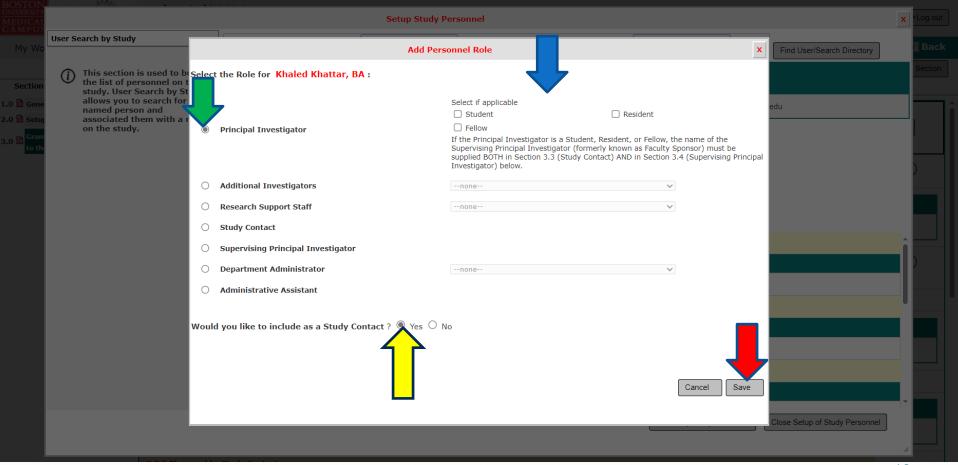


Tip – If you can't find this person in INSPIR, ask that person to login to INSPIR for the first time and their INSPIR account will be created. They can use the step-by-step instructions in the link below to login and create their INSPIR account:

http://www.bumc.bu.edu/irb/files/2016/10/Access-to-INSPIR.pdf

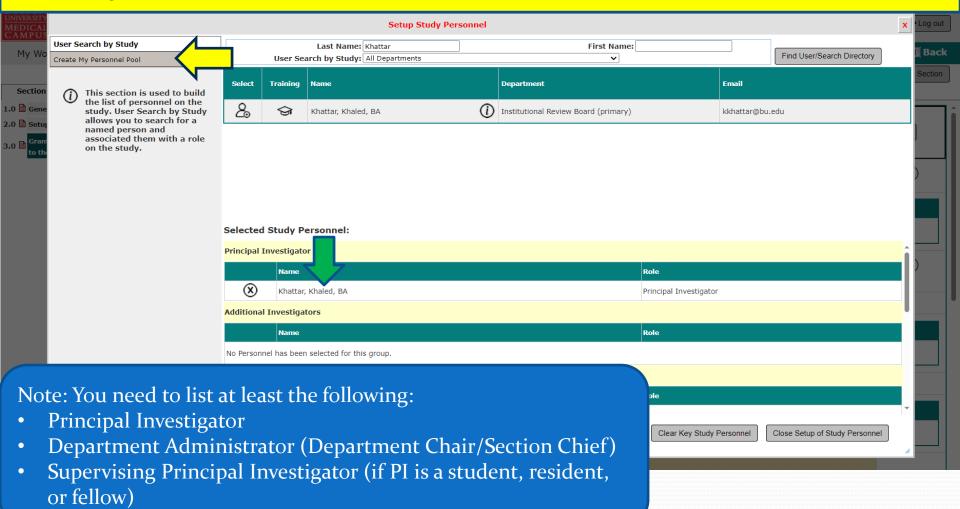
This will open the "Add Personnel Role" popup.

- 1. Select their role on the study by clicking on one of the listed roles' radio buttons (green arrow).
- 2. Some roles require that you select the user's role subcategory from a drop-down menu- (blue arrow). Select the user's role subcategory if applicable.
- 3. If you want this person to get study tasks and all study email notifications, select "Yes" (yellow arrow) for "Would you like to include as a Study Contact?", otherwise select "No".
- 4. When you are done, click on the "Save" button (red arrow).



This will take you back to the "Setup Study Personnel" popup.

- Note that the person just added is showing up in the appropriate section/role (green arrow).
- To add more personnel, repeat steps in <u>slides 10</u> 13.
- Once you are done selecting all study personnel, now you can create your personnel pool by clicking on "Create My Personnel Pool" (yellow arrow).

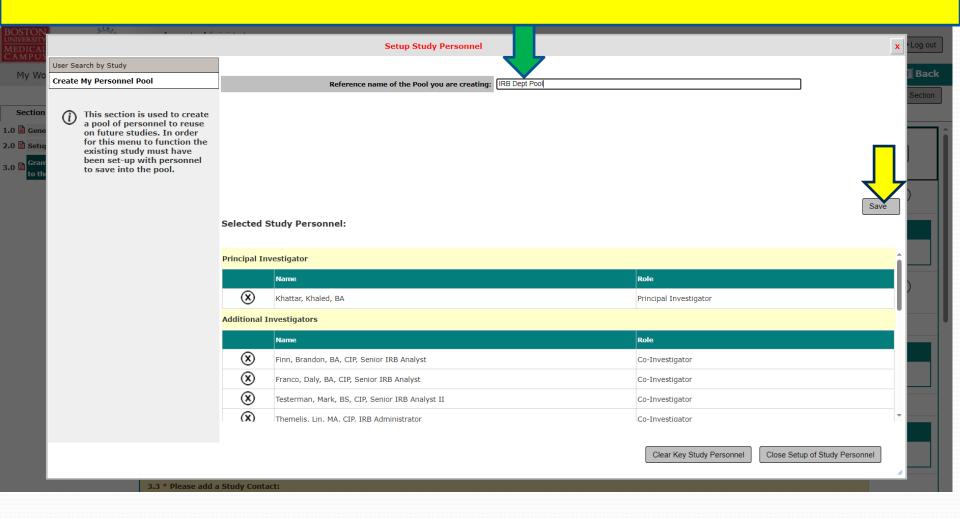


13

Option 1 and Option 2

This will open the "Create My Personnel Pool" tab.

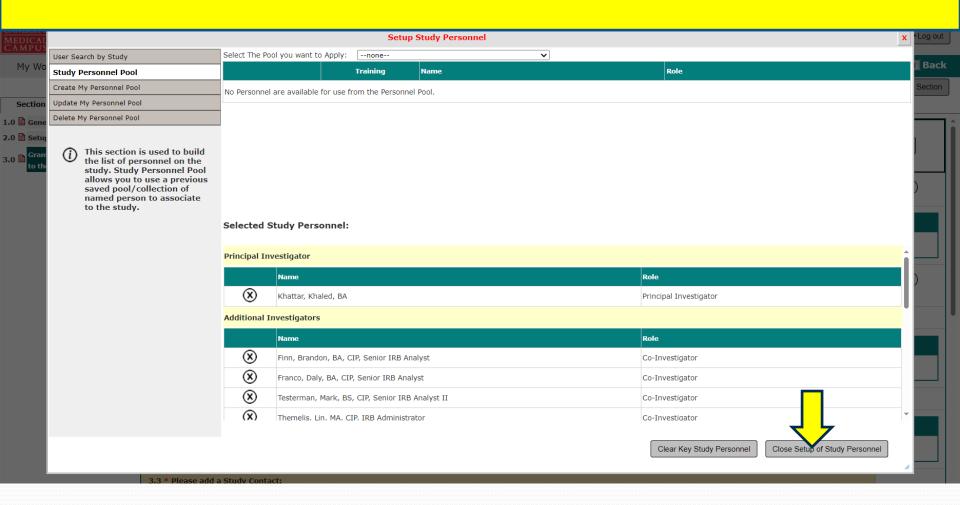
- Type in a name for you personnel pool (green arrow).
- Click on the "Save" button to save your personnel pool (yellow arrow).



Option 1 and Option 2

Your Personnel Pool has been created.

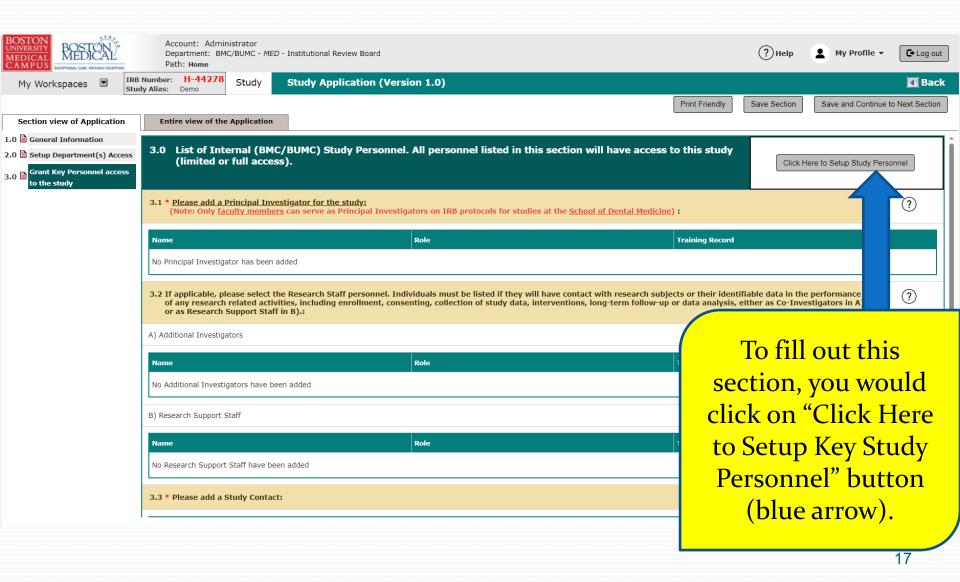
Click on "Close Setup of Study Personnel" button (yellow arrow).



How to Apply your Personnel Pool to New Study Application Drafts

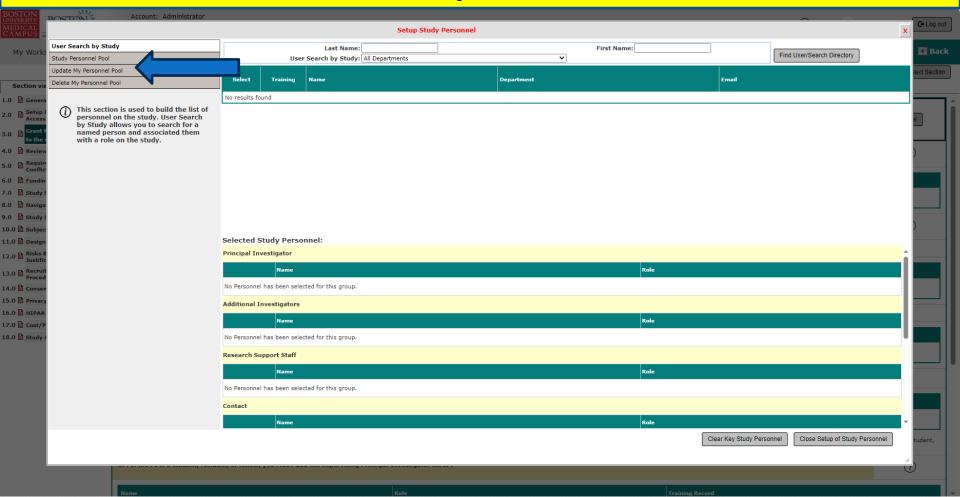
- You can apply your Personnel Pool in a new Study Application, in Section "3.0 Grant Key Personnel access to the study" while it is still in draft form
- Once you apply your Personnel Pool to a new Study Application draft, you can still remove staff from this study personnel, or add more personnel that were not part of the Personnel Pool.
- You can even create a new Personnel Pool from the final list of personnel on the new draft, if it can be useful for future study drafts.

In a new Study Application Draft, you would get to Section "3.0 Grant Key Personnel access to the study" to list the study personnel



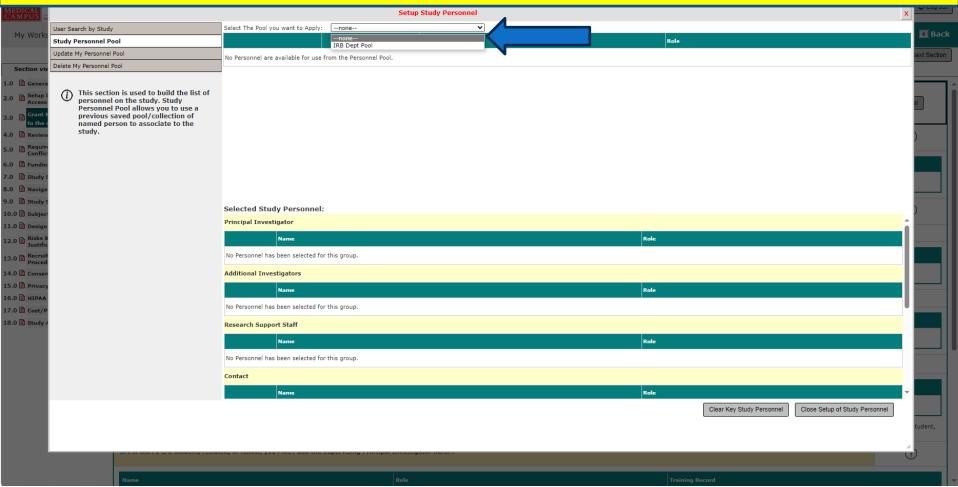
This will open the "Setup Study Personnel" popup.

 To use one of your personnel pools to add personnel to this Study Application draft, click on the "Study Personnel Pool" (blue arrow)



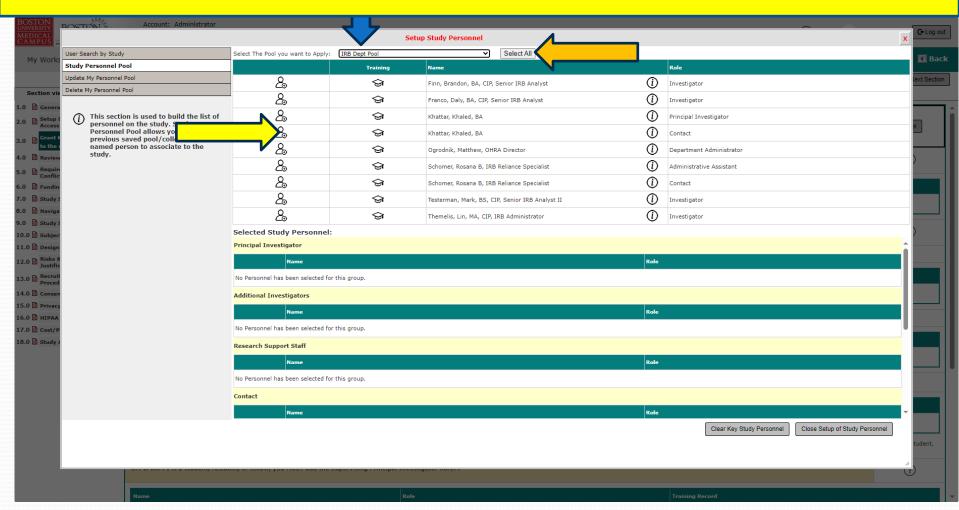
This will reopen the "Setup Study Personnel" popup but in the "Study Personnel Pool" tab.

• From the "Select The Pool you want to Apply:" dropdown list, select the personnel pool that you want to use (blue arrow)



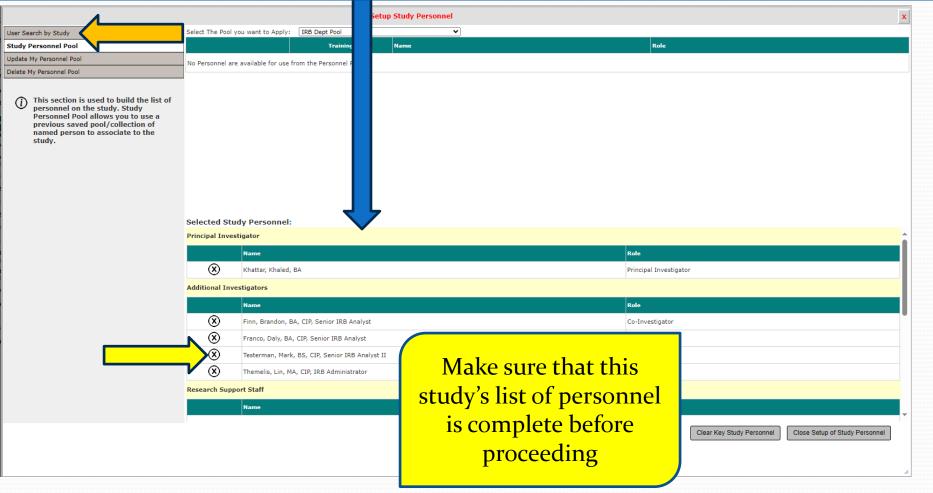
The system will refresh the "Setup Study Personnel" popup and lists all personnel that are part of the selected Personnel Pool (in this example, it's the "IRB Dept Pool") - blue arrow.

You can individually select the ones you want added to this study (yellow arrow),
 OR you can click "Select All" to add all of them at once (orange arrow)

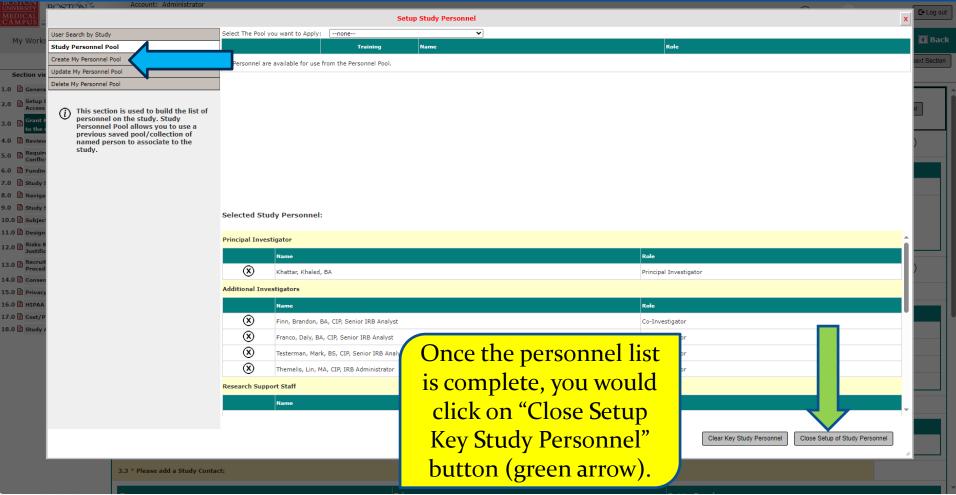


The system will refresh the "Setup Study Personnel" popup and you will see the personnel and their corresponding roles, that you have just selected, now listed under "Selected Study Personnel:"- blue arrow.

• You can still be able to remove someone from the list by clicking on the corresponding (X) icon (yellow arrow), and you can add someone not on the list by using the "User Search by Study" tab (orange arrow)



- If your current list that you just built is now different from the Personnel Pool that you used to built it, the system will also give you the option to create a new Personnel Pool from this list. If you want to create a new Personnel Pool, click on "Create My Personnel Pool" tab (blue arrow) and follow the same instructions in slide # 14 above to create one.
- To apply the personnel list completed to this draft, you would click on "Close Setup Key Study Personnel" button (green arrow).



The system will take you back to Section "3.0 Grant Key Personnel access to the study" after adding the previously selected list of personnel and their roles to this new Study Application draft.

Number: H-44278 y Alias: Demo Khattar, Khaled, BA Study Application (Version 1.0)		₫ Back
Entire view of the Application		Print Friendly Save Section Save and Continue to Next Section
3.0 List of Internal (BMC/BUMC) Study Personnel. All personnel lis	sted in t ection will have access to this study (limited or full acce	Click Here to Setup Study Personnel
3.1 * <u>Please add a Principal Investigator for the study:</u> (Note: Only <u>faculty members</u> can serve as Principal Investigators on IRB protoco	ls for st	•
Name	Role	Training Record
Khaled Khattar, BA	Principal Investigator	
Responsibility Student Fellow If the Principal Investigator is a Student, Resident, or Fellow, the name of the Supervising Principal Investigator (formerly known as Faculty Sponsor) must be supplied BOTH in Section 3.3 (Study Contact) AND in Section 3.4 (Supervising Principal Investigator) below. 3.2 If applicable, please select the Research Staff personnel. Individuals must be listed if they will have contact with research subjects or their identifiable data in the performance of any research related activities, including enrollment, consenting, collection of study data, interventions, long-term follow-up or data analysis, either as Co-Investigators in A) or as Research Support Staff in B): A) Additional Investigators		
Name	Role	Training Record
Finn, Brandon, BA, CIP, Senior IRB Analyst	Co-Investigator 🗸	
Franco, Daly, BA, CIP, Senior IRB Analyst	Co-Investigator	Si View Training Record
Testerman, Mark, BS, CIP, Senior IRB Analyst II	Co-Investigator 🔻	Si View Training Record
Themelis, Lin, MA, CIP, IRB Administrator	Co-Investigator 🔻	Si View Training Record
B) Research Support Staff		
Name	Role	Training Record
No Research Support Staff have been added		
3.3 * Please add a Study Contact:		