

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).

Option 1

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.

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Hello Khaled Khattar, BA
your last login was
10/23/2023 11:30 AM EDT

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My Workspaces Study

All Studies

Recently Used Study Status

Search for RB Number, Title, Alias Search

51 result(s) found... 1 - 10

Click to open Study Dashboard	Study Status	Review Board	IRB Number	IRB Expiration	Study Title	Principal	Actions
	Exempt - limited IRB review	IRB	H-31000		testing signoff	Khattar, Khaled, BA	Applications Documents Forms Hide Exempt Copy Delete Correspond
	Inactive - Administratively Closed	IRB	H-31293		testing signoff	Khattar, Khaled, BA	Applications Documents Forms Hide Exempt Copy Delete Correspond
	Draft	IRB	H-35016		testing signoff	Khattar, Khaled, BA	Applications Documents Forms Hide Exempt Copy Delete Correspond
	Draft	IRB	H-38079		testing signoff	Khattar, Khaled, BA	Applications Documents Forms Hide Exempt Copy Delete Correspond
	Draft	IRB	H-41022		testing signoff	Khattar, Khaled, BA	Applications Documents Forms Hide Exempt Copy Delete Correspond
	Draft	IRB	H-41826	06/09/2022	testing signoff	Khattar, Khaled, BA	Applications Documents Forms Hide Exempt Copy Delete Correspond
	Expired	IRB	H-41826	06/09/2022	testing signoff	Khattar, Khaled, BA	Applications Documents Forms Hide Exempt Copy Delete Correspond

MASTER 2020 DRAFT APPLICATION

You can use the “Search” box to locate the study or draft. Or you can just scroll down.

Once you locate the study or draft, click on the “Open” icon

Option 1

This opens the study into the “Submissions” tab.

Account: Khaled Khattar, BA
Department: BMC/BUMC - MED - Institutional Review Board
Path: Home

IRB Number: **H-31000**
Study Alias: 2-18-2011-
PI: Administrator

My Workspaces Study Submissions **1 Back**

Study Status: **Exempt - limited IRB review** IRB Number : H-31000 Study Title : Testing

Submissions Study Management

[Close Exempt Study](#) [Current Approval Packet](#)

Protocol Items

- Study Application
- Informed Consents
- Other Study Documents

Submission Forms

Available Forms

- Change Request and Amendments

Submissions History

Study Correspondence

Outstanding Submission(s)

Track Location	Ref Number	Request Type	Process Submission
	1239876	Click on the hyperlink to edit/view the submission. Continuing Review Submission Form	Send Submission
	1229778	Click on the hyperlink to edit/view the submission. IRB has requested a Submission Correction for Change Request and Amendments	Send Submission

Click on “Study Management”- blue arrow

Option 1

This opens the “Define Study Access” page.

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Account: Khaled Khattar, BA
Department: BMC/BUMC - MED - Institutional Review Board
Path: Home > study mgmt.

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Study

Define Study Access

Back

IRB Number: H-31000

Study Alias: 2-18-2011-

PI: Administrator

Study Status: Exempt - limited IRB

IRB Number : H-31000

Study Title : Testing

Save Access to the Study

Active

History

3.0 List of Internal (BMC/BUMC) Study Personnel. All personnel listed in this section will have access to this study (limited or full access).

Click Here to Setup Study Personnel

3.1 * Please add a Principal Investigator for the study:
(Note: Only faculty members can serve as Principal Investigators on IRB protocols for studies at the School of Dental Medicine)

Name	Role	Training Record
Administrator	Principal Investigator	View Training Record

Responsibility

☐ Student

☐ Fellow

If the Principal Investigator is a Student, Resident, or Fellow, the name of the Sponsor must be supplied BOTH in Section 3.3 (Study Contact) AND in Section 3.2

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)).

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Click on “Click Here to Setup Personnel” button - blue arrow

Option 1

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.

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My Work

Section 1
1.0 General
2.0 Setup
3.0 Grant to the

Setup Study Personnel

Log out

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Section

User Search by Study

Create My Personnel Pool

Last Name: Khattar

First Name:

User Search by Study: All Departments

Find User/Search Directory

This section is used to build the list of personnel on the study. User Search by Study allows you to search for a named person and associated them with a role on the study.

Select	Training	Name	Department	Email
<input type="checkbox"/>		Khattar, Khaled, BA	<div><div></div><div>Institutional Review Board (primary)</div></div>	kkhattar@bu.edu

Selected Study Personnel:

Principal Investigator

	Name	Role
<input checked="" type="radio"/>	Khattar, Khaled, BA	Principal Investigator

Additional Investigators

	Name	Role
No Personnel has been selected for this group.		

Research Support Staff

	Name	Role
--	------	------

Clear Key Study Personnel

Close Setup of Study Personnel

3.3 * Please add a Study Contact:

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

Click on “Click Here to Setup Key Study Personnel” button (blue arrow).

Option 2

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.

Setup Study Personnel

User Search by Study

Last Name: Khattar First Name:

User Search by Study: All Departments

Select Training Name Department Email

No results found

Selected Study Personnel:

Principal Investigator

Name	Role
No Personnel has been selected for this group.	

Additional Investigators

Name	Role
No Personnel has been selected for this group.	

Research Support Staff

Name	Role
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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>

Option 2

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.




Setup Study Personnel

User Search by Study

Last Name: Khattar First Name:

User Search by: All Departments Find User/Search Directory

This section is used to build the list of personnel on the study. User Search by Study allows you to search named person and associated them with a role on the study.

Select	Training	Name	Department	Email
		Khattar, Khaled, BA	 Institutional Review Board (primary)	kkhattar@bu.edu

Selected Study Personnel:

Principal Investigator

Name	Role
No Personnel has been selected for this group.	

Additional Investigators

Name	Role
No Personnel has been selected for this group.	

Research Support Staff

Name	Role
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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>

Option 2

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).

Setup Study Personnel

Add Personnel Role

Select the Role for **Khaled Khattar, BA** :

☒ Principal Investigator

☐ Additional Investigators

☐ Research Support Staff

☐ Study Contact

☐ Supervising Principal Investigator

☐ Department Administrator

☐ Administrative Assistant

Select if applicable

☐ Student ☐ Resident ☐ 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.

--none--

--none--

--none--

Would you like to include as a Study Contact ? ☒ Yes ☐ No

Cancel Save

Option 2

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 slides 10 – 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).

Setup Study Personnel

User Search by Study

Create My Personnel Pool

Last Name: Khattar First Name:

User Search by Study: All Departments Find User/Search Directory

Select	Training	Name	Department	Email
		Khattar, Khaled, BA	Institutional Review Board (primary)	kkhattar@bu.edu

Selected Study Personnel:

Principal Investigator

	Name	Role
	Khattar, Khaled, BA	Principal Investigator

Additional Investigators

	Name	Role
No Personnel has been selected for this group.		

Clear Key Study Personnel Close Setup of Study Personnel

Note: This section is used to build the list of personnel on the study. User Search by Study allows you to search for a named person and associated them with a role on the study.

Note: You need to list at least the following:

- Principal Investigator
- Department Administrator (Department Chair/Section Chief)
- Supervising Principal Investigator (if PI is a student, resident, or fellow)

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).

Setup Study Personnel

User Search by Study

Create My Personnel Pool

Reference name of the Pool you are creating: IRB Dept Pool

Selected Study Personnel:

Principal Investigator		
	Name	Role
(X)	Khattar, Khaled, BA	Principal Investigator

Additional Investigators		
	Name	Role
(X)	Finn, Brandon, BA, CIP, Senior IRB Analyst	Co-Investigator
(X)	Franco, Daly, BA, CIP, Senior IRB Analyst	Co-Investigator
(X)	Testerman, Mark, BS, CIP, Senior IRB Analyst II	Co-Investigator
(X)	Themelis. Lin. MA. CIP. IRB Administrator	Co-Investigator

Clear Key Study Personnel Close Setup of Study Personnel

3.3 * Please add a Study Contact:

Option 1 and Option 2

Your Personnel Pool has been created.

- Click on “Close Setup of Study Personnel” button (yellow arrow).

My Work

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2.0 Setup

3.0 Grant to the

Setup Study Personnel

User Search by Study

Study Personnel Pool

Create My Personnel Pool

Update My Personnel Pool

Delete My Personnel Pool

This section is used to build the list of personnel on the study. Study Personnel Pool allows you to use a previous saved pool/collection of named person to associate to the study.

Select The Pool you want to Apply: --none--

	Training	Name	Role
No Personnel are available for use from the Personnel Pool.			

Principal Investigator

	Name	Role
(X)	Khattar, Khaled, BA	Principal Investigator

Additional Investigators

	Name	Role
(X)	Finn, Brandon, BA, CIP, Senior IRB Analyst	Co-Investigator
(X)	Franco, Daly, BA, CIP, Senior IRB Analyst	Co-Investigator
(X)	Testerman, Mark, BS, CIP, Senior IRB Analyst II	Co-Investigator
(X)	Themelis, Lin. MA. CIP. IRB Administrator	Co-Investigator

Clear Key Study Personnel

Close Setup of Study Personnel

Log out

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Section

3.3 • Please add a Study Contact:

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.

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Account: Administrator
Department: BMC/BUMC - MED - Institutional Review Board
Path: Home

? HelpMy Profile ↘Log out

My Workspaces ▾IRB Number:
Study Alias:

H-44278DemoStudy Study Application (Version 1.0)Back

Print FriendlySave SectionSave and Continue to Next Section

Section view of ApplicationEntire view of the Application

1.0 General Information2.0 Setup Department(s) Access3.0 Grant Key Personnel access to the study

3.0 List of Internal (BMC/BUMC) Study Personnel. All personnel listed in this section will have access to this study (limited or full access).

Click Here to Setup Study Personnel?

3.1 * Please add a Principal Investigator for the study:
(Note: Only faculty members can serve as Principal Investigators on IRB protocols for studies at the School of Dental Medicine) :

Name	Role	Training Record
No Principal Investigator has been added		

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
No Additional Investigators have been added	

B) Research Support Staff

Name	Role
No Research Support Staff have been added	

3.3 * Please add a Study Contact:

To fill out this section, you would click on “Click Here to Setup Key Study Personnel” button (blue arrow).

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)

BOSTON UNIVERSITY MEDICAL CAMPUS Account: Administrator

Setup Study Personnel

User Search by Study

Last Name: First Name:

User Search by Study:

Study Personnel Pool

Update My Personnel Pool

Delete My Personnel Pool

Select	Training	Name	Department	Email
No results found				

Selected Study Personnel:

Principal Investigator

Name	Role
No Personnel has been selected for this group.	

Additional Investigators

Name	Role
No Personnel has been selected for this group.	

Research Support Staff

Name	Role
No Personnel has been selected for this group.	

Contact

Name	Role
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My Works

Section view

1.0 General

2.0 Setup & Access

3.0 Grant & to the

4.0 Review

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6.0 Fundin

7.0 Study t

8.0 Naviga

9.0 Study t

10.0 Subjec

11.0 Design

12.0 Risks & Justific

13.0 Recruit Proc

14.0 Conser

15.0 Privacy

16.0 HIPAA

17.0 Cost/P

18.0 Study t

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)

Setup Study Personnel

User Search by Study

Study Personnel Pool

Update My Personnel Pool

Delete My Personnel Pool

Select The Pool you want to Apply: --none--

Name	Role
IRB Dept Pool	

No Personnel are available for use from the Personnel Pool.

Selected Study Personnel:

Principal Investigator

Name	Role
No Personnel has been selected for this group.	

Additional Investigators

Name	Role
No Personnel has been selected for this group.	

Research Support Staff

Name	Role
No Personnel has been selected for this group.	

Contact

Name	Role
No Personnel has been selected for this group.	

Clear Key Study Personnel Close Setup of Study Personnel

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)

Setup Study Personnel

Account: Administrator

User Search by Study: Select The Pool you want to Apply: **IRB Dept Pool** **Select All**

Study Personnel Pool

	Training	Name	Role
<input type="checkbox"/>	Graduate	Finn, Brandon, BA, CIP, Senior IRB Analyst	Investigator
<input type="checkbox"/>	Graduate	Franco, Daly, BA, CIP, Senior IRB Analyst	Investigator
<input type="checkbox"/>	Graduate	Khattar, Khaled, BA	Principal Investigator
<input type="checkbox"/>	Graduate	Khattar, Khaled, BA	Contact
<input type="checkbox"/>	Graduate	Ogrodnik, Matthew, OHRA Director	Department Administrator
<input type="checkbox"/>	Graduate	Schomer, Rosana B, IRB Reliance Specialist	Administrative Assistant
<input type="checkbox"/>	Graduate	Schomer, Rosana B, IRB Reliance Specialist	Contact
<input type="checkbox"/>	Graduate	Testerman, Mark, BS, CIP, Senior IRB Analyst II	Investigator
<input type="checkbox"/>	Graduate	Themelis, Lin, MA, CIP, IRB Administrator	Investigator

Selected Study Personnel:

Principal Investigator

Name	Role
No Personnel has been selected for this group.	

Additional Investigators

Name	Role
No Personnel has been selected for this group.	

Research Support Staff

Name	Role
No Personnel has been selected for this group.	

Contact

Name	Role
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Information: This section is used to build the list of personnel on the study. Personnel Pool allows you to select from a previous saved pool/collect a new pool of named person to associate to the study.

Buttons: Clear Key Study Personnel, Close Setup of Study Personnel

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)

The screenshot shows the 'Setup Study Personnel' interface. On the left, a sidebar contains buttons: 'User Search by Study' (highlighted with an orange arrow), 'Study Personnel Pool', 'Update My Personnel Pool', and 'Delete My Personnel Pool'. Below these is an information icon and text: 'This section is used to build the list of personnel on the study. Study Personnel Pool allows you to use a previous saved pool/collection of named person to associate to the study.' The main area has a dropdown 'Select The Pool you want to Apply:' set to 'IRB Dept Pool'. Below this is a table with columns 'Training', 'Name', and 'Role'. A message states 'No Personnel are available for use from the Personnel Pool'. A large blue arrow points from this message to the 'Selected Study Personnel:' section. This section includes a 'Principal Investigator' table with one entry: Khattar, Khaled, BA, Principal Investigator. Below it is an 'Additional Investigators' table with four entries: Finn, Brandon, BA, CIP, Senior IRB Analyst (Co-Investigator); Franco, Daly, BA, CIP, Senior IRB Analyst; Testerman, Mark, BS, CIP, Senior IRB Analyst II; and Themelis, Lin, MA, CIP, IRB Administrator. A yellow arrow points to the (X) icon in the first row of the 'Additional Investigators' table. At the bottom is a 'Research Support Staff' table with a 'Name' column. A yellow callout box at the bottom right contains the text: 'Make sure that this study's list of personnel is complete before proceeding'. At the bottom right are two buttons: 'Clear Key Study Personnel' and 'Close Setup of Study Personnel'.

Setup Study Personnel

Select The Pool you want to Apply:

Training	Name	Role
No Personnel are available for use from the Personnel Pool		

Selected Study Personnel:

Principal Investigator

Name	Role
(X) Khattar, Khaled, BA	Principal Investigator

Additional Investigators

Name	Role
(X) Finn, Brandon, BA, CIP, Senior IRB Analyst	Co-Investigator
(X) Franco, Daly, BA, CIP, Senior IRB Analyst	
(X) Testerman, Mark, BS, CIP, Senior IRB Analyst II	
(X) Themelis, Lin, MA, CIP, IRB Administrator	

Research Support Staff

Name

Make sure that this study's list of personnel is complete before proceeding

- If your current list that you just built is now different from the Personnel Pool that you used to build 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).

Setup Study Personnel

User Search by Study: Select The Pool you want to Apply:

Study Personnel Pool

Create My Personnel Pool

Update My Personnel Pool

Delete My Personnel Pool

Personnel are available for use from the Personnel Pool.

Selected Study Personnel:

Principal Investigator

	Name	Role
(X)	Khattar, Khaled, BA	Principal Investigator

Additional Investigators

	Name	Role
(X)	Finn, Brandon, BA, CIP, Senior IRB Analyst	Co-Investigator
(X)	Franco, Daly, BA, CIP, Senior IRB Analyst	
(X)	Testerman, Mark, BS, CIP, Senior IRB Analyst	
(X)	Themelis, Lin, MA, CIP, IRB Administrator	

Research Support Staff

	Name
--	------

Clear Key Study Personnel **Close Setup of Study Personnel**

Once the personnel list is complete, you would click on “Close Setup Key Study Personnel” button (green arrow).

3.3 * Please add a Study Contact:

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
Alias: Demo
Khattar, Khaled, BA

Study

Study Application (Version 1.0)

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Print Friendly

Save Section

Save and Continue to Next Section

Entire view of the Application

3.0 List of Internal (BMC/BUMC) Study Personnel. All personnel listed in this section will have access to this study (limited or full access).

Click Here to Setup Study Personnel

3.1 * Please add a Principal Investigator for the study:
(Note: Only faculty members can serve as Principal Investigators on IRB protocols for studies in the School of Dental Medicine) :

Name	Role	Training Record
Khaled Khattar, BA	Principal Investigator	View Training Record
Responsibility <input type="checkbox"/> Student <input type="checkbox"/> Resident <input type="checkbox"/> 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	<input type="text" value="Co-Investigator"/>	View Training Record
Franco, Daly, BA, CIP, Senior IRB Analyst	<input type="text" value="Co-Investigator"/>	View Training Record
Testerman, Mark, BS, CIP, Senior IRB Analyst II	<input type="text" value="Co-Investigator"/>	View Training Record
Themelis, Lin, MA, CIP, IRB Administrator	<input type="text" value="Co-Investigator"/>	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: