National Research Network ®

Committee Coordinator:
Track Training & Credentials

Training Energizer

IRBNet

IRBNet provides the research community with an unmatched set of secure, web-based collaboration tools to support the design, management, review and oversight of research involving human subjects, animal models, recombinant DNA, and more.

This Energizer covers how to track Training & Credentials (T&C) for your research community. It will illustrate how to:

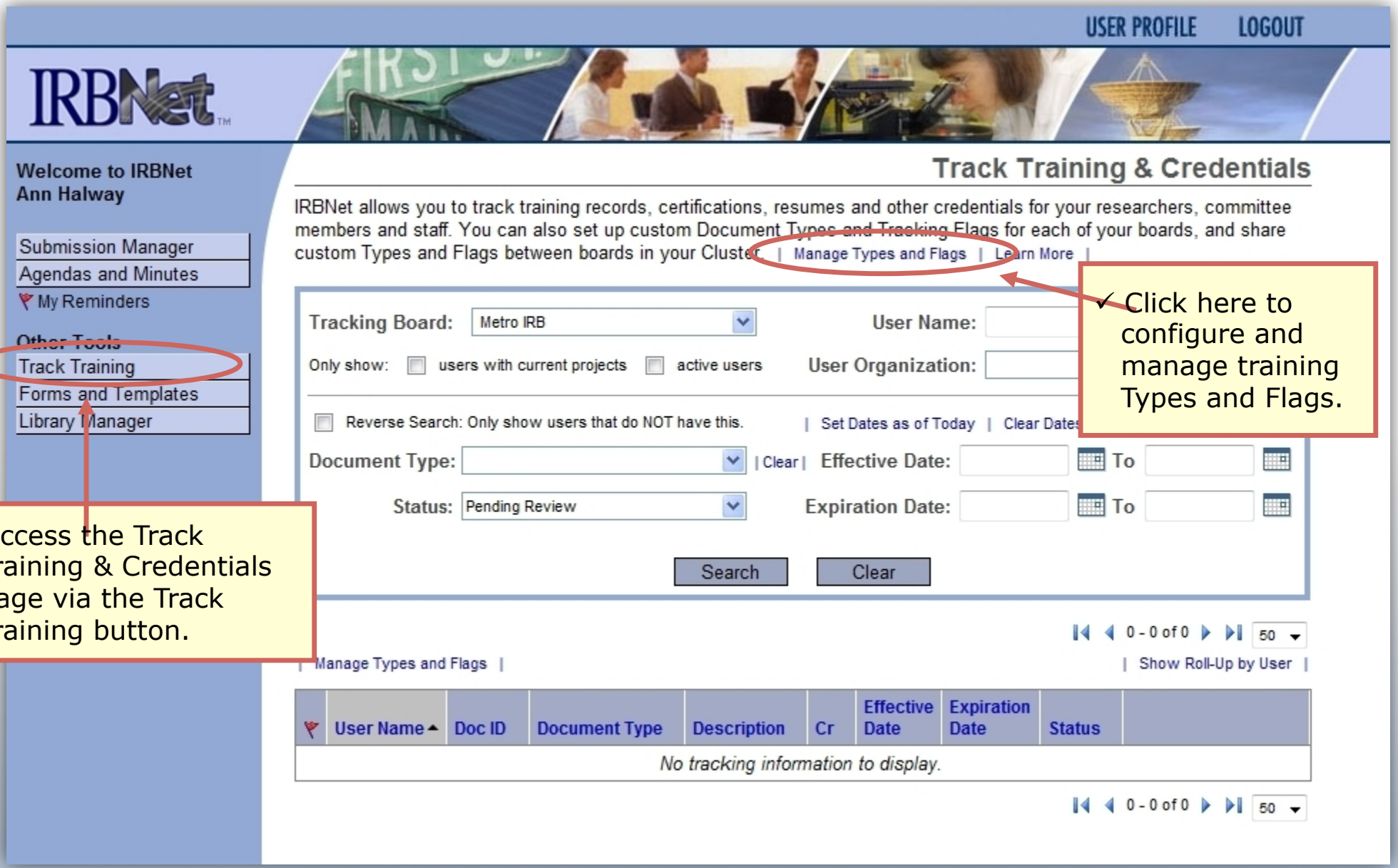
- Define your accepted T&C Types.
- Track T&C documentation as a part of the review process.
- Review and Accept submitted T&C documents.
- Manage your training credentials for your entire research community.
- Track upcoming credential expiration dates.



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Track Training & Credentials

The Track Training & Credentials (T&C) page is your homepage for managing the documentation of your research community.



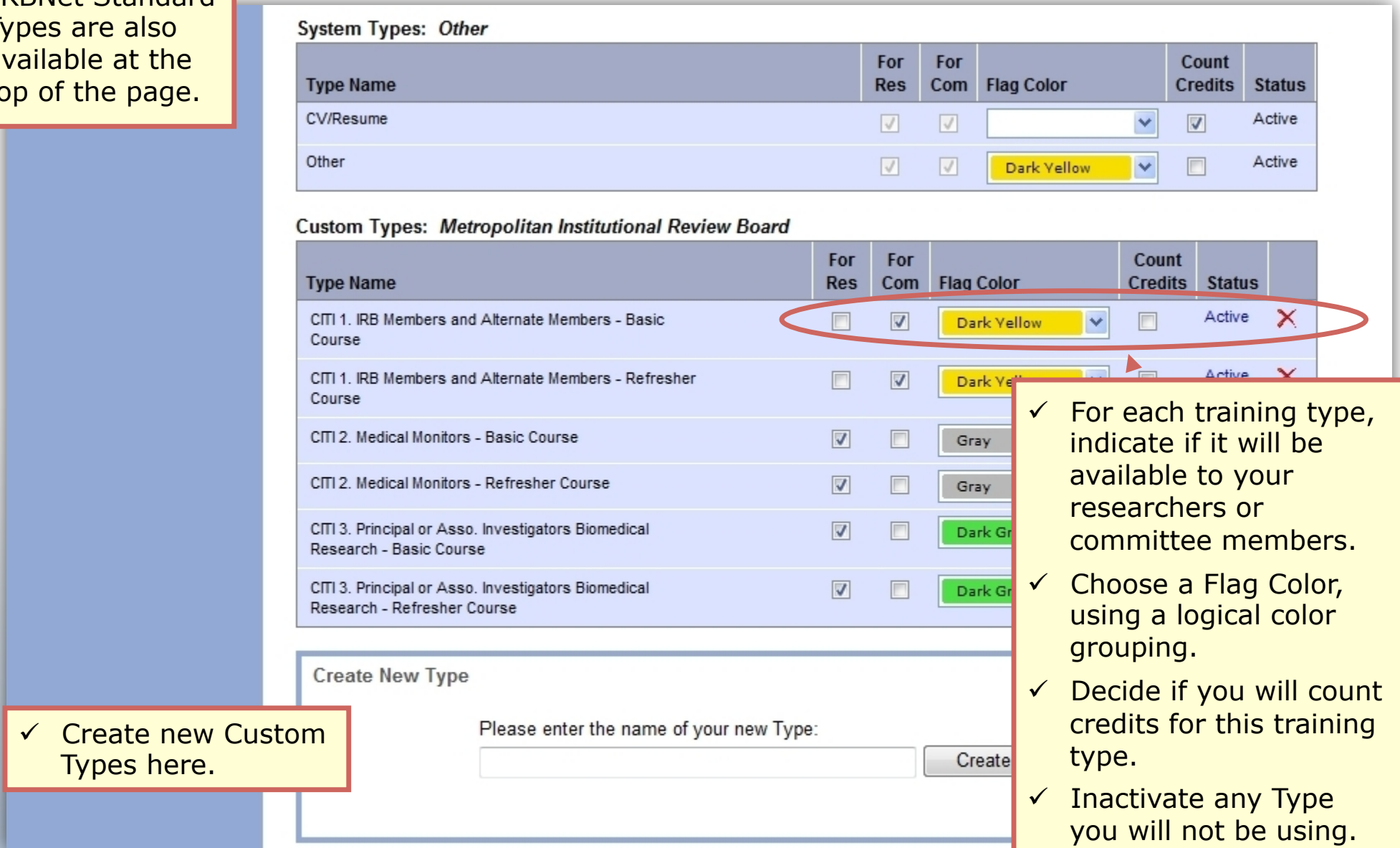
✓ Click here to configure and manage training Types and Flags.

✓ Access the Track Training & Credentials page via the Track Training button.

Define Training Types

Construct the list of training and certification types for your researchers to choose from, using Standard IRBNet Types as well as your own Custom Types.

✓ IRBNet Standard Types are also available at the top of the page.



✓ Create new Custom Types here.

✓ For each training type, indicate if it will be available to your researchers or committee members.

✓ Choose a Flag Color, using a logical color grouping.

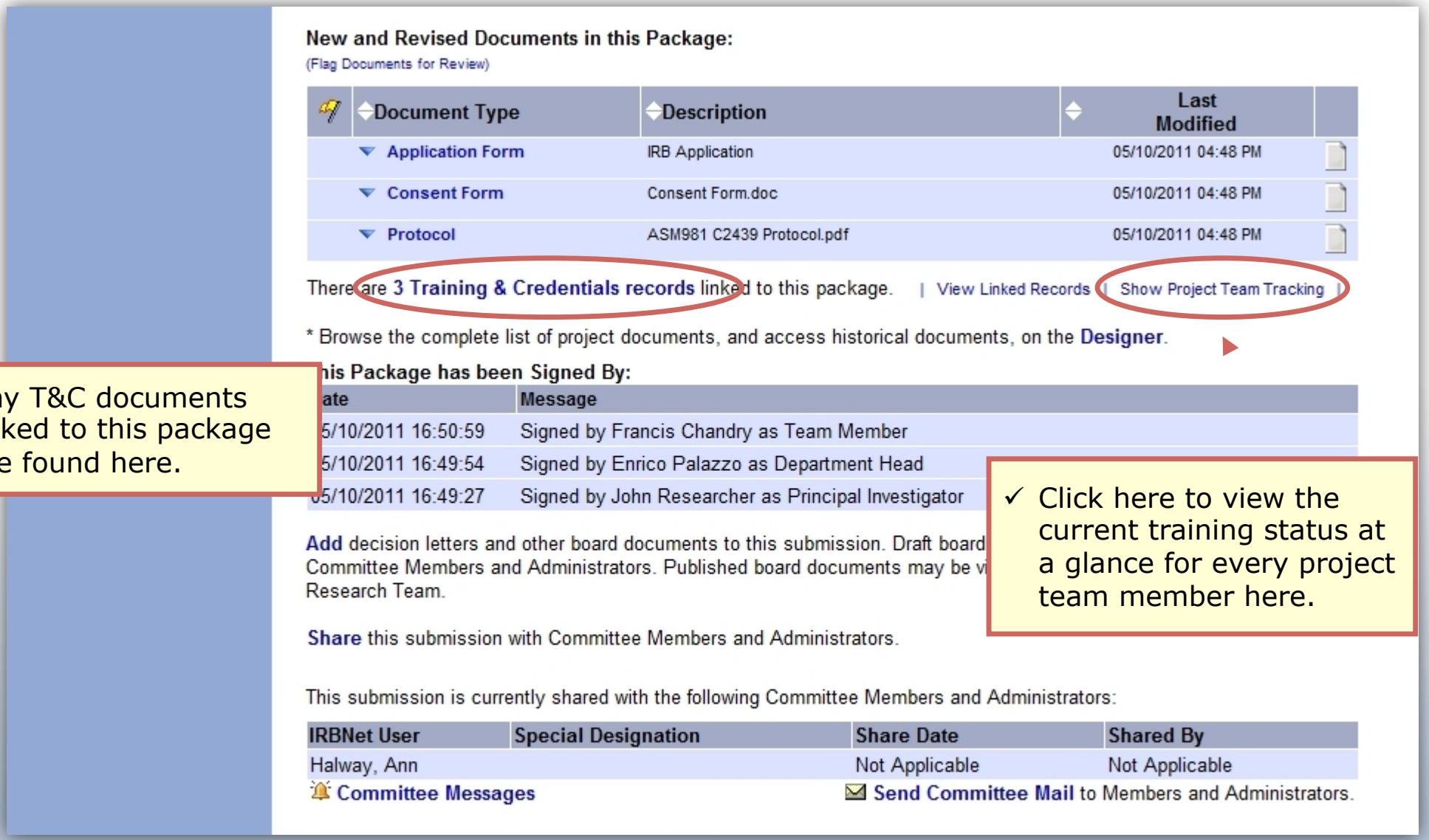
✓ Decide if you will count credits for this training type.

✓ Inactivate any Type you will not be using.

Review T&C Documents from within the Submission Detail page.

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T&C tools are conveniently placed just below the New and Revised Documents section, and provide a streamlined user experience.



✓ Any T&C documents linked to this package are found here.

✓ Click here to view the current training status at a glance for every project team member here.

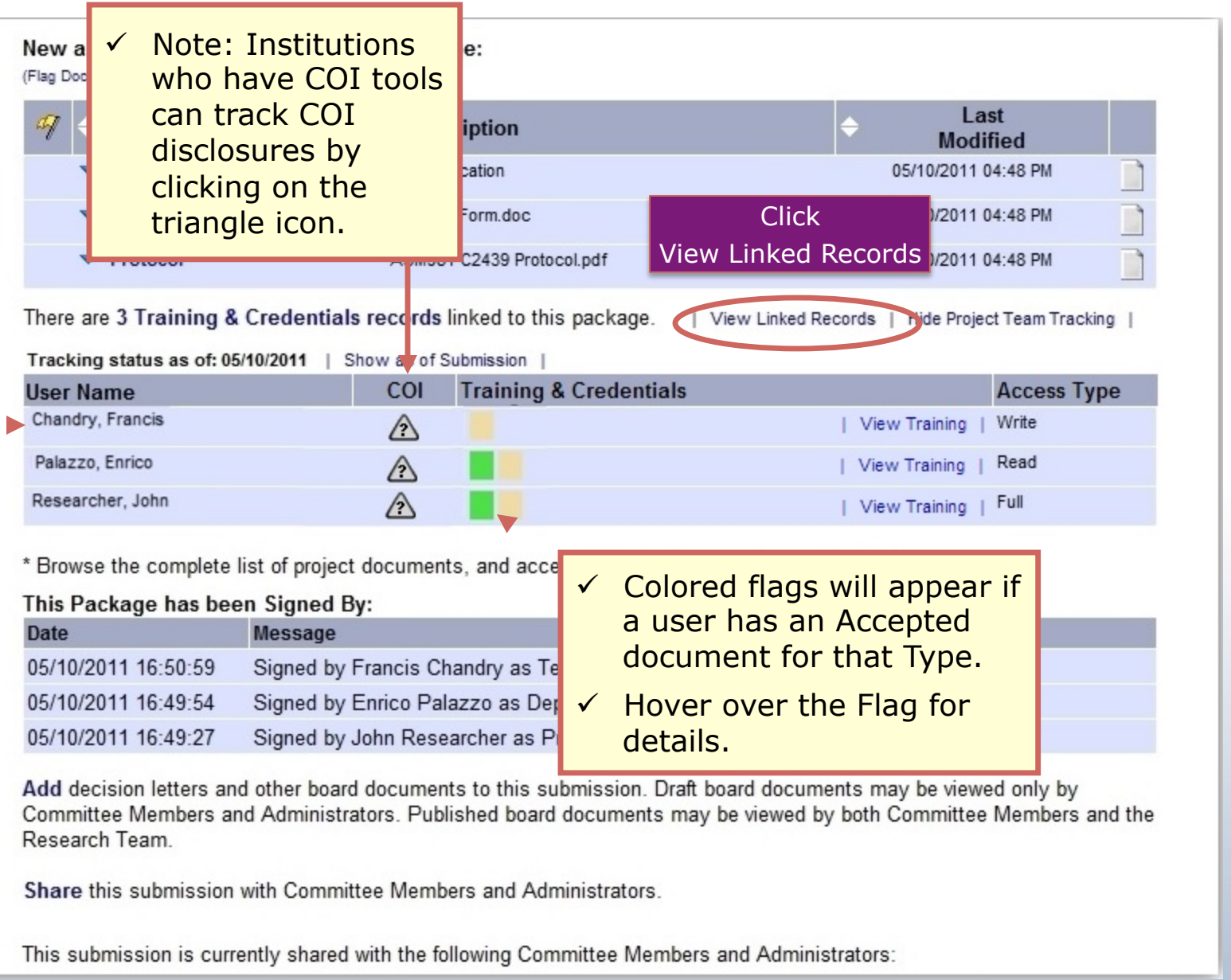
Manage Research Team Training

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View the current status of each user's T&C documents via the Submission Detail page.

- ✓ Note: Institutions who have COI tools can track COI disclosures by clicking on the triangle icon.

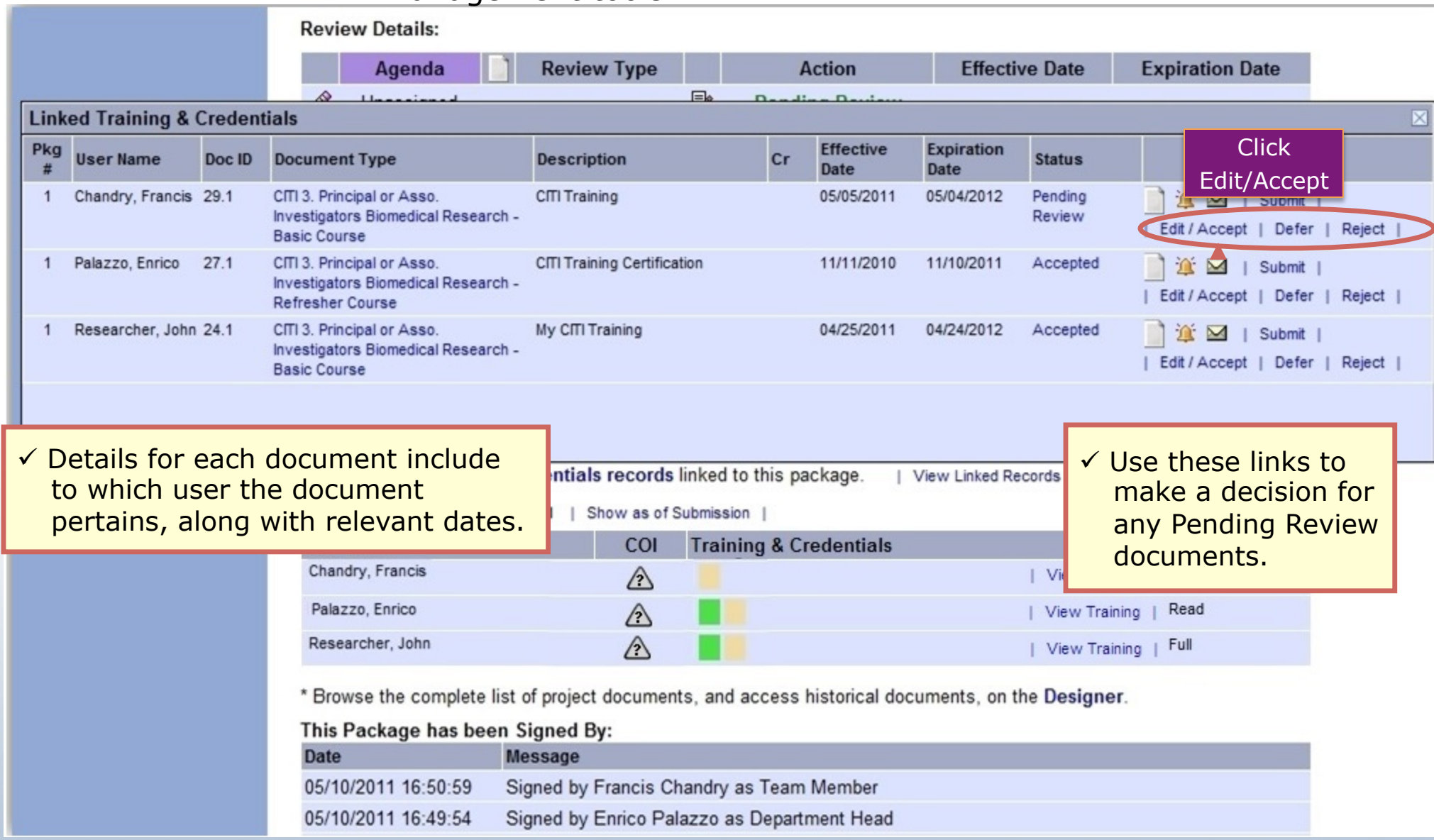
- ✓ Each researcher who has access to the project will be displayed.
- ✓ Note: Francis Chandry is missing a green Flag.



- ✓ Colored flags will appear if a user has an Accepted document for that Type.
- ✓ Hover over the Flag for details.

Review Linked Documents

By clicking the View Linked Records link, we can view all documents linked to this package, and also access T&C management tools.

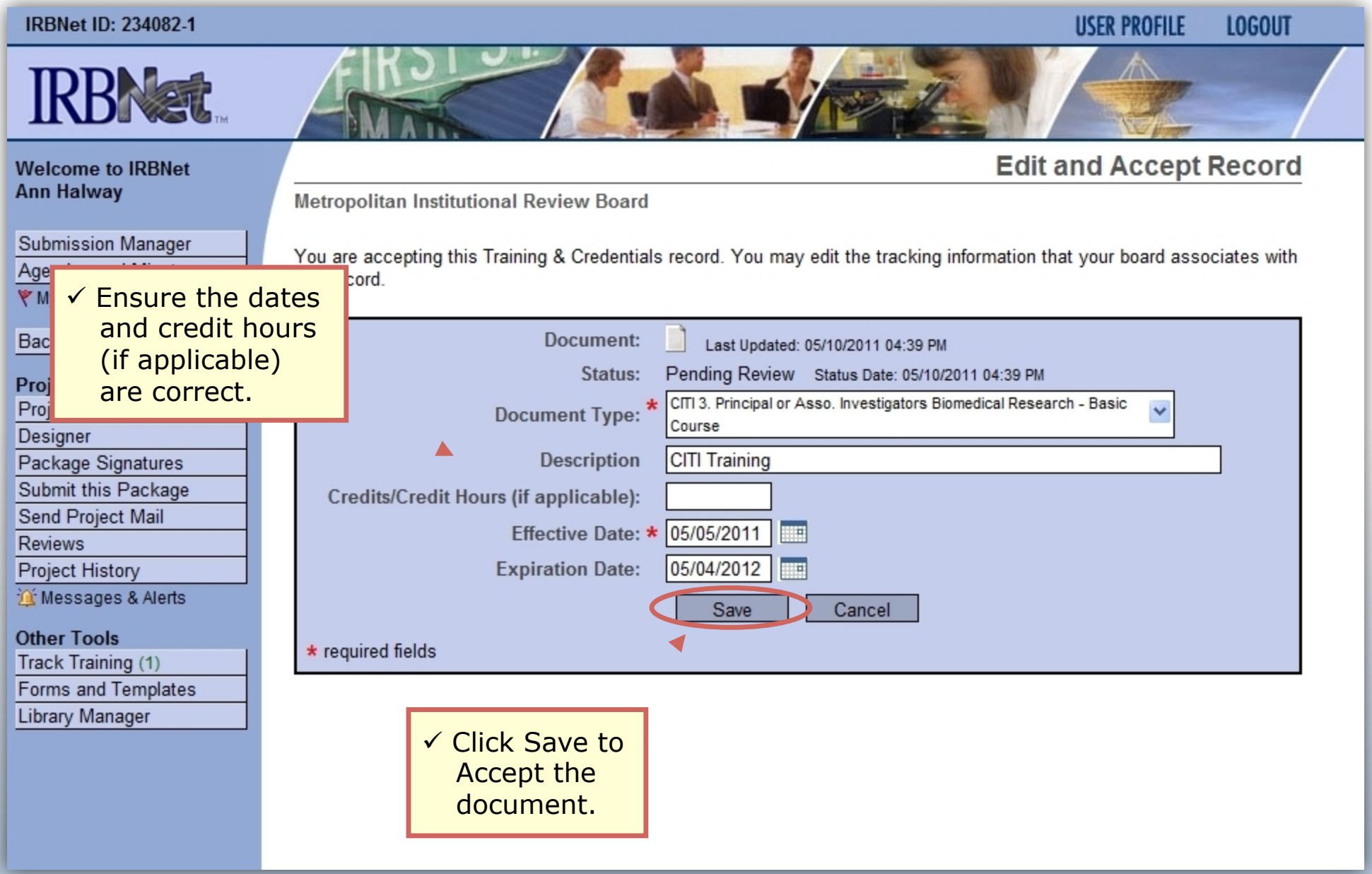


✓ Details for each document include to which user the document pertains, along with relevant dates.

✓ Use these links to make a decision for any Pending Review documents.

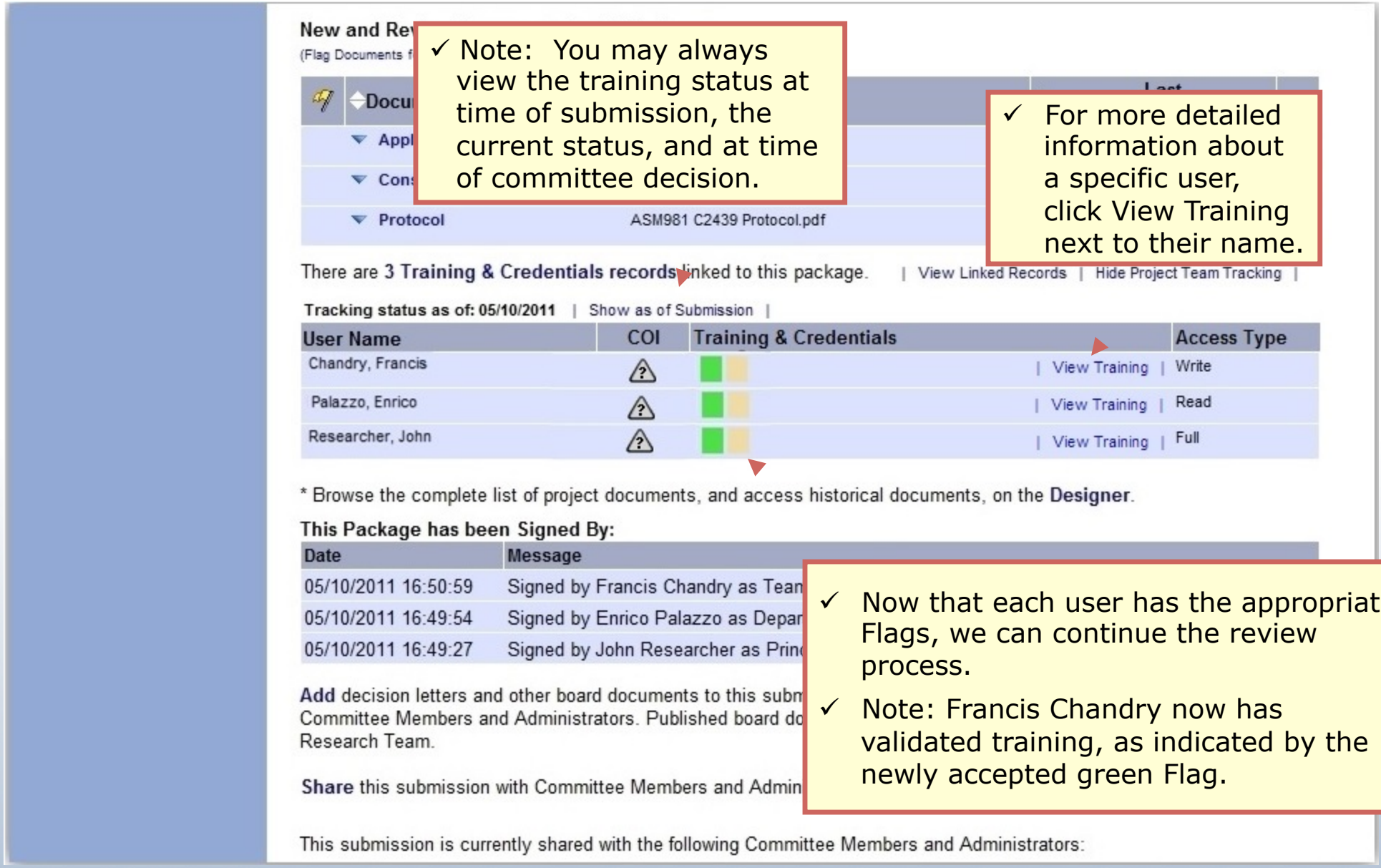
Edit and Accept Documents

If choosing to Accept a document, you may verify, edit if necessary, and accept the correct information entered.



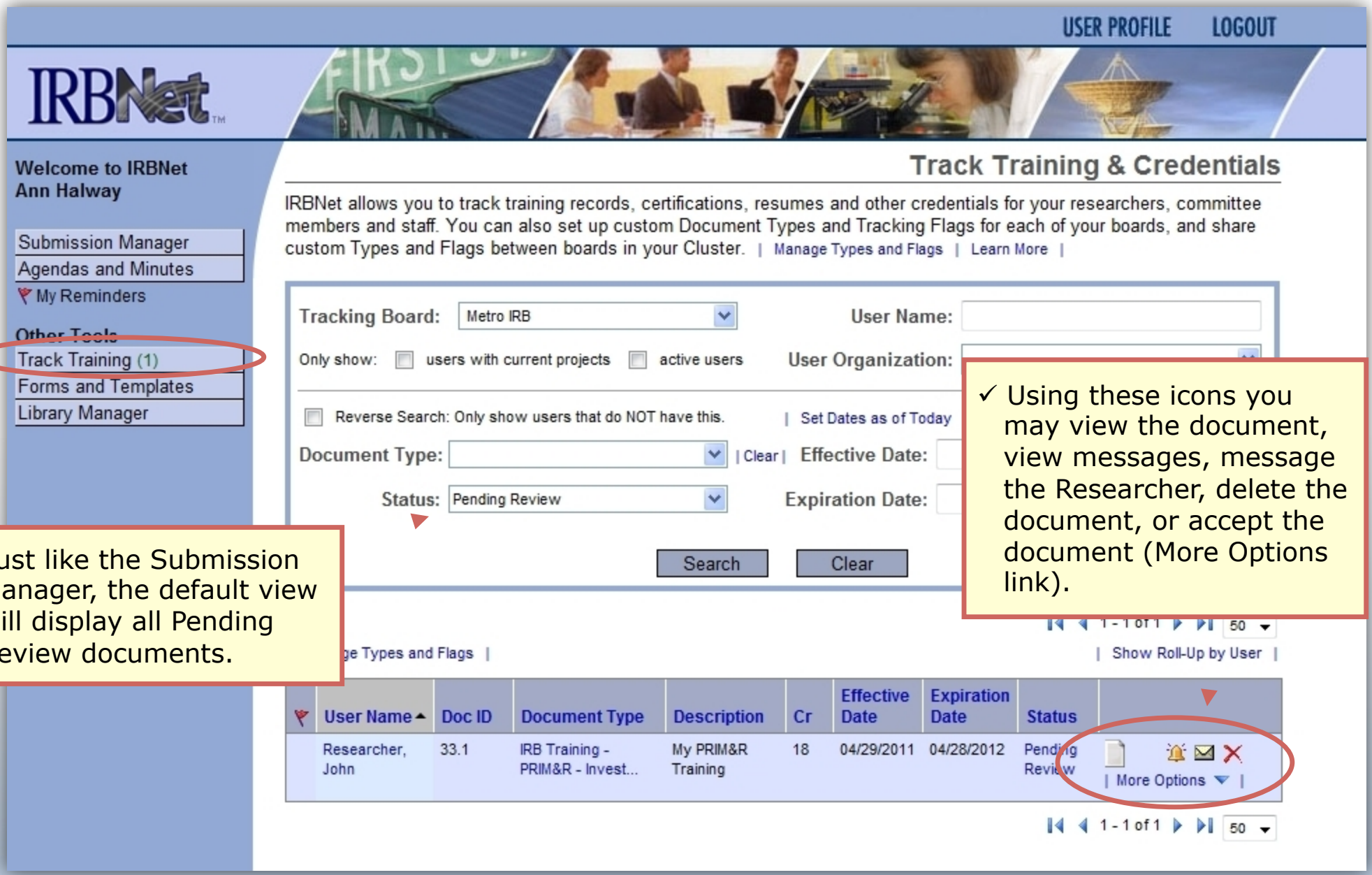
Verify Current Training

Having Accepted a T&C document, the updated status will reflect on the Submission Detail page.



Manage Research Community

The Track Training & Credentials page will allow you to manage training requirements for your community.

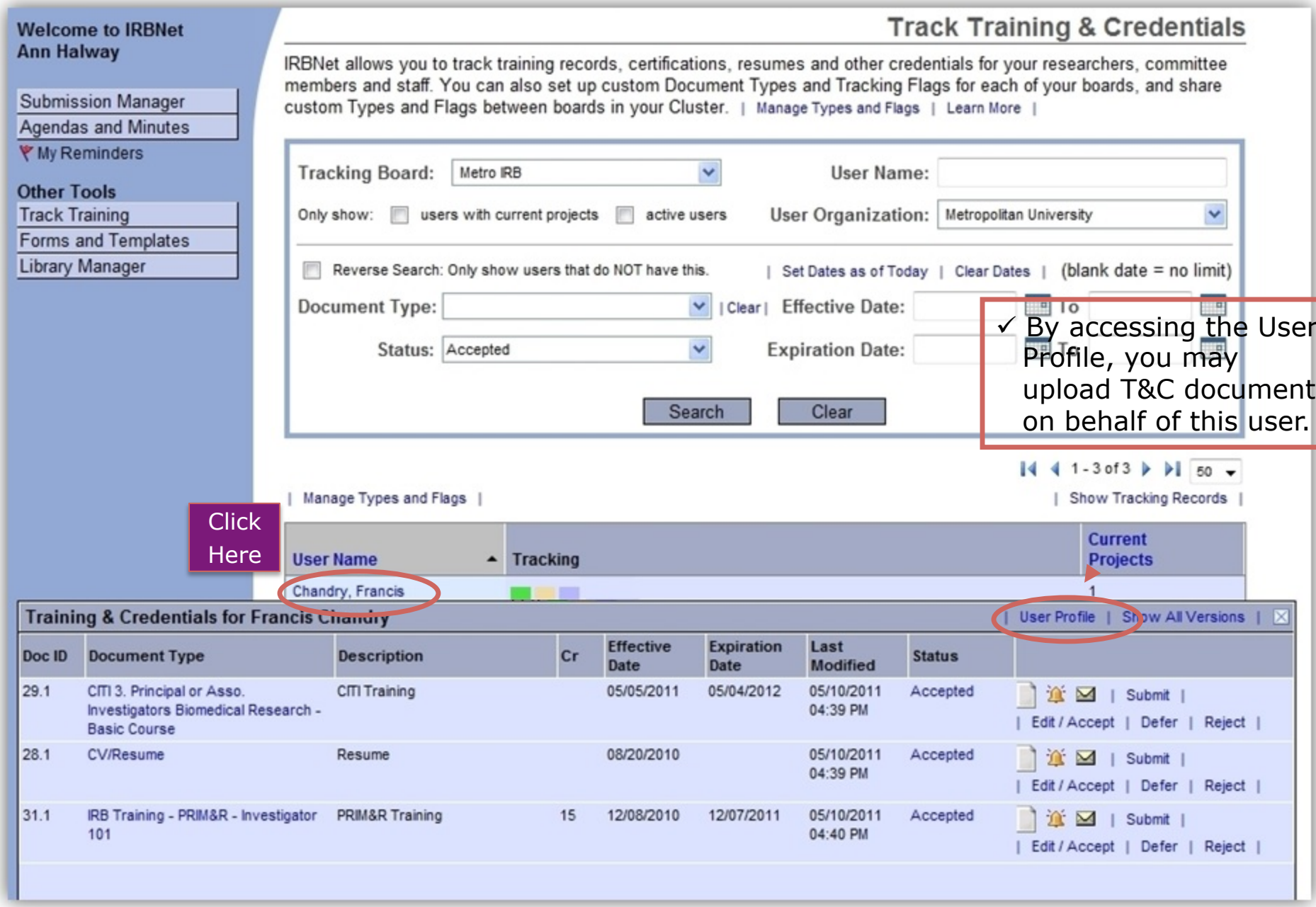


✓ Just like the Submission Manager, the default view will display all Pending Review documents.

✓ Using these icons you may view the document, view messages, message the Researcher, delete the document, or accept the document (More Options link).

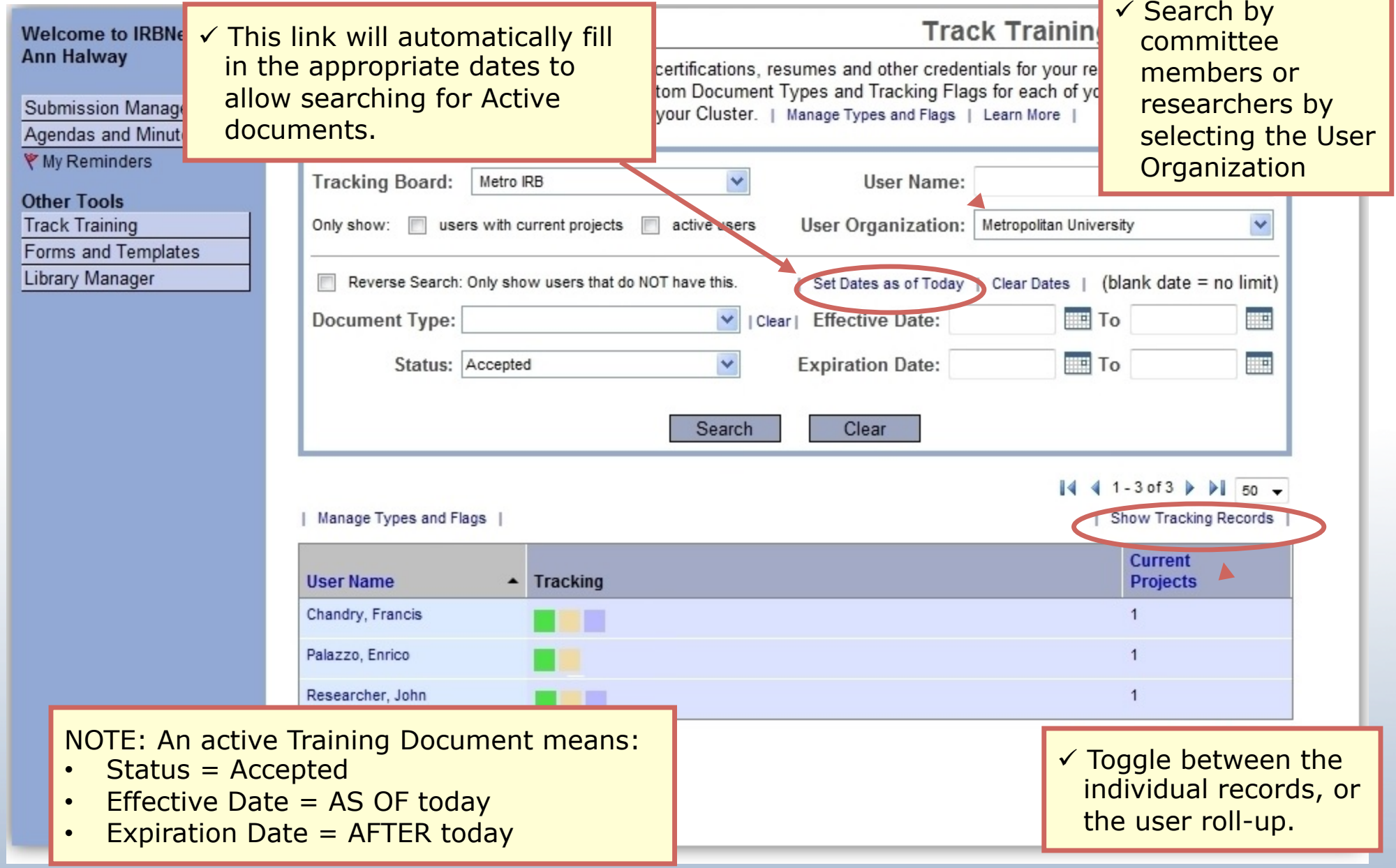
Manage Individual Users

By clicking on a user's name, you can view every document associated with them.



Manage Active T&C Documents

Use the provided search tools to view all users with an active training document.



✓ This link will automatically fill in the appropriate dates to allow searching for Active documents.

✓ Search by committee members or researchers by selecting the User Organization

NOTE: An active Training Document means:
- Status = Accepted
- Effective Date = AS OF today
- Expiration Date = AFTER today

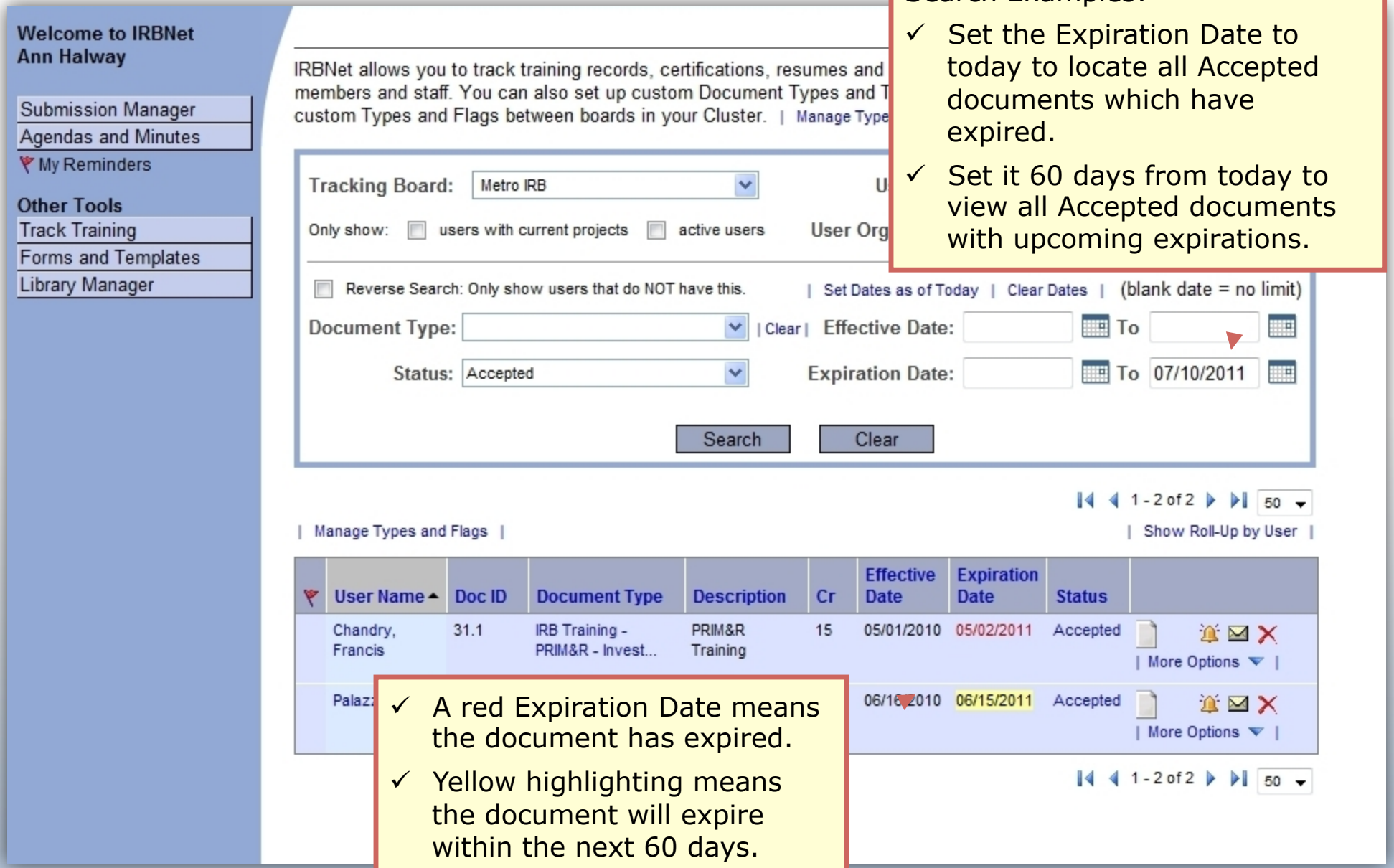
✓ Toggle between the individual records, or the user roll-up.

Manage Expiring T&C Documents

Using the search tools, you can search for any document with an upcoming expiration date.

Search Examples:

- ✓ Set the Expiration Date to today to locate all Accepted documents which have expired.
- ✓ Set it 60 days from today to view all Accepted documents with upcoming expirations.



- ✓ A red Expiration Date means the document has expired.
- ✓ Yellow highlighting means the document will expire within the next 60 days.

Further Information…

If you have any further questions please contact the IRBNet Support Desk at **support@irbnet.org**

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