1. Go to [http://eprotocol.osu.edu](http://eprotocol.osu.edu)

2. **Log in** with your OSU user name (last name, number) and password.
   - For help with user name or password contact the Office of Information Technology’s Help Desk (help@osu.edu or 614-688-4357).
   - Principal Investigators may request guest accounts for study team members who are not OSU employees or students by contacting Yocom.9@osu.edu.
   - Contact User Support at orhelpdesk@osu.edu or 614.688.8288 for any problems logging in with a verified user name and password.

3. **Complete registration screens (the first time you log in).**
   - Check that your preferred OSU or medical center email address is listed for system notifications.

4. **You will be directed to an area in e-protocol called My Workspace.**

5. **Click on My Workspace**
6. **My Roles** should be displaying **Study Team**.

7. **Click on the e-IBC tab** to find the IBC new protocol application.

8. **Click on Create IBC Protocol**.
9. You are ready to start entering your new protocol information.
   - Some responses will be typed.
   - Some responses will be chosen from pull down menus.
   - In some sections, you will upload a file.

10. Protocol Identification / Study Team Members

11. Be careful to select the Principal Investigator’s academic unit from the pull down menu.
• Read the directions and see the information under the help icon.
• The correct answer could be a division, department or college.
• Check with the PI if you have any questions, because choosing the wrong unit, will delay department endorsement and protocol review.

**Short Cut:** To quickly search the more than 500 administrative units listed, Filter by Organization and use a wildcard by entering % before and after a word or part of a word will search for units with those letters” For example, to find “infectious diseases”, filter by Organization, type %inf% and Click Go.
12. Study Team Members

- Add additional contacts, co-investigators, and key personnel in this section.
- **You cannot add a person until they have registered in the e-protocol system.**
- Everyone listed on the protocol can read the protocol online once they are registered.
- Additional contacts receive copies of all study notifications and correspondence sent to the principal investigator.
- The protocol creator is an automatic additional contact.

- Filter by Last Name and type a wildcard %part of name% and click Go to search for people quickly.
  
  For example, quickly find Yonkura by filtering on last name and typing %Yon% and clicking on Go.

- **If you don’t find a person’s name in the list, contact them and ask them to register for e-protocol at [http://eprotocol.osu.edu](http://eprotocol.osu.edu) so they can be added to your study team.**

13. Once you have created the study team, the software will give you immediate feedback on the study team requirements.
• Click on the person’s name to view a grid that displays the status of that person’s requirements.

• The software will not allow submission until each investigator and key personnel has satisfied the requirements.

• Outstanding requirements are shown in the pink areas of the grid.

• If a team member needs to meet outstanding requirements, the procedures for meeting them are posted at: http://orrp.osu.edu/ibc/training/
14. Click on **Continue** when you finish this and future screens. Continue saves your work and moves you to the next screen.

15. If you need to stop working before you complete the application, you can click **Exit** and you will be prompted to save your work.
16. If you need to move backwards in the application, do not use the back button on your internet browser. Instead, click on Jump To and select an application section.

Think of the Jump To as your navigation guide, the section marked in red is your current location within the application.

17. Answer every question marked with a red asterisk. If you don’t, you will get immediate feedback in an error warning when you try to continue to the next screen.
18. Getting Started

- This is a **very important section** of the application.
- Each question must be carefully answered.
- Your responses will trigger what follows.
- The **questions** in the application **collapse and expand** depending on your responses in this section.

For example, if you answer yes to using recombinant or synthetic nucleic acids, another set of mandatory questions will appear on the screen.
19. In some sections of the application, you will be asked to select information from a pull down list. For example, you will add locations / research sites from a list of OSU buildings. Data entry screens will pop up, so you must set your internet browser to allow pop ups.
Be sure to respond to every mandatory question (marked with a red asterisk). For example, you will get an error message if you forget to specify a room number in this section.

20. In some sections, you may be asked to upload a document.

When you click Add, you will see a screen that will allow you to browse your computer files, select one, and rename it as you wish.
Click OK to upload the file. It will become a part of your IBC protocol submission and available for committee reviewers.

21. If you are using a biosafety cabinet as part of your Safety Equipment, you will be asked to provide information about the equipment.
The certification date, manufacturer, and serial number are collected in another pop up.

22. Funding / Sponsor Information

- The Ohio State University must confirm in writing that the IACUC has reviewed the same work the sponsor is funding.
- If you have applied for or been awarded funds, click yes, enter the OSU proposal or award number, type in the sponsor name.
23. **Upload only the research section of your proposal or grant.**

24. **Completion Confirmation Page**

Before you click on the finish button, it is best to click on Hide / Show Errors to double check that you have answered every question and have no errors in your submission.
25. Any errors or skipped items will be listed. You can quickly Jump to that section to resolve the problem by clicking on that section in the problem list. The problems drop off the list as you resolve them.

26. Now you are ready to Click Finish but the protocol is not yet submitted.

27. Only the PI can submit the protocol.
28. After hitting the finish button, the protocol creator is taken to the protocol workspace.

29. The protocol creator can now view any documents that were uploaded to the submission by clicking the Attachments.

30. If the protocol creator is not the PI, the creator should click on Email PI to let the PI know the submission is ready to be checked and forwarded for review.

31. The PI will receive the email and can click the link in the email to access the submission.

32. The PI should click on Forward submission for review when submission is complete.
33. Next, the PI needs to complete an assurance document. The PI should read the assurance carefully and respond to all of the assurance questions.

34. In the following screens, the PI is asked to:
   - Review all information in the assurance
   - Verify that information provided in the application is accurate and complete
   - Select and acknowledge the types of training that all lab personnel will have.
   - Respond to the Conflict of Interest disclosure question
   - And agree with the assurance statement.
I agree to follow all applicable policies and procedures of The Ohio State University and federal, state, and local laws and guidance regarding the use of bioshazards in research, as well as with professional practice standards and generally accepted good research practice guidelines for investigators, including, but not limited to, the following:

- The research will be performed as approved by the IBC under the direction of the Principal Investigator and by appropriately trained and qualified personnel with adequate resources;
- The research will not be initiated until written notification of IBC approval has been received with the exception that certain categories of DNA research may be exempt or can be initiated prior to or simultaneous with submission of protocol for review;
- The Principal Investigator will adhere to the responsibilities as outlined in Section 4.6 of the OSU Institutional Laboratory Biosafety Manual (https://www.osu.edu/ohio-state.edu/biohazard/biosafetymanual.pdf) and Section IV.B.7 of the NIH Guidelines (http://ohsrs.od.nih.gov/od/ric/NIH_Guidelines_O activating_Risk_Toc_7265189);
- Research-related records (and source documents) will be maintained in a manner that documents the validity of the research and integrity of the data collected.
- Research-related records will be retained and available for audit for a period of at least three years after the research has ended (or longer, according to sponsor or publication requirements) even if I leave the University;
- The Office of Responsible Research Practices will be contacted for assistance in amending (if a request change in Principal Investigator) or terminating the research if I leave the University or am unable to conduct or supervise the research personally (e.g., Sabbatical or extended leave) and
- All Co-Investigators, research staff, employees, and students assisting in conduct of the research will be informed of their obligations in meeting the above commitments.

I verify that the information provided in this application is accurate and complete.

General Assurances

Lab Safety Assurances
a. I acknowledge all laboratory personnel have been trained in biohazard spill clean up procedures as referenced in the Institutional Biosafety Manual. In addition, all spills will be cleaned using a minimum 10% solution of bleach (1 part sodium hypochlorite: 9 parts water) with a minimum contact time of 30 minutes. An equivalent USEPA registered disinfectant that is also tuberculocidal may also be used in accordance with the manufacturer’s specifications.

b. I acknowledge that all potentially infectious materials will be disposed of in an infectious waste per OSU policy.

c. My staff and I agree to use the applicable practices and procedures described in Biosafety for Microbiological and Biomedical Laboratories (ASM USL 5th Ed).

d. Materials will be transported in a sealed, leak-proof primary container which will then be placed in a secondary, leak-proof secondary container. All off campus transportation of materials will be in compliance with OSHA and DOT regulations.

Conflict of Interest

* Do you or any member of your immediate family have a significant financial interest (e.g. speaking and consultation fees, travel expenses, proprietary interest in the tested product, stock ownership or other equity or membership in the sponsor over $ 10,000 per year or representing greater than 5% ownership in the company) with any entity supporting or providing in kind support to the research, or any company that may benefit from the research? See OSU COI Policy for more information.

☐ Yes ☐ No ☐ Clear

If yes, ensure that your current OSU financial conflict of interest screening disclosure form is updated to include this information. eCOI

Forward Submission for Review

☐ I agree with the above statements.
35. The PI clicks on **OK** to forward the submission for review.

36. Now the submission is locked, and not available for editing.

37. The PI is returned to the **Protocol Workspace**.

38. The **protocol history** confirms that the submission was forwarded for review.
39. Study team members and the PI can follow the submission’s review progress in the protocol’s history.

40. The history will grow over time, click the arrow to read more activity entries.

For Technical Problems
User Support  orhelpdesk@osu.edu  614.688.8288

For Help Answering the IBC Protocol Questions, email ibcinfo@osu.edu