

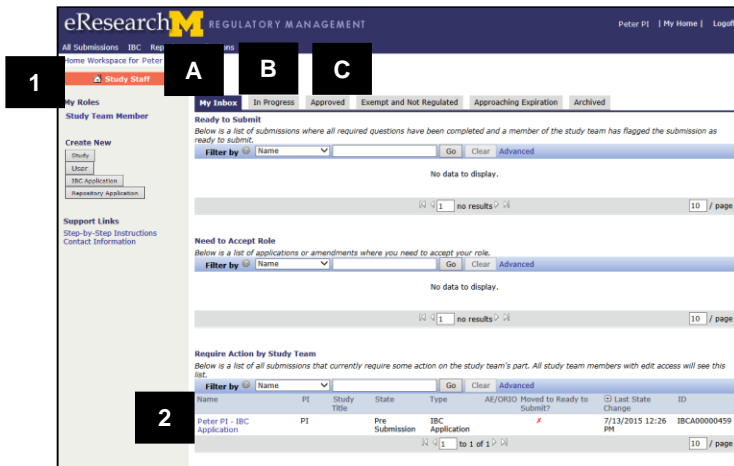
## IBC Application Tasks: Working with the Application Workspace

This reference document provides the basic steps for common tasks you may take with an IBC application, from the Application Workspace including:

- [Finding your IBC Application](#)
- [IBC Application Workspace Features](#)
- [Viewing your IBC Application](#)
- [Amending or Renewing your Approved IBC Application](#)
- [Finding your Amendments or Renewals](#)

### Finding your IBC Application

#### Home Workspace - My Inbox tab



1. Verify **Study Staff** is displayed in your Home Workspace (or select **Study Team Member** under My Roles).

#### Notes:

**A.** The **My Inbox** tab lists applications that require action:

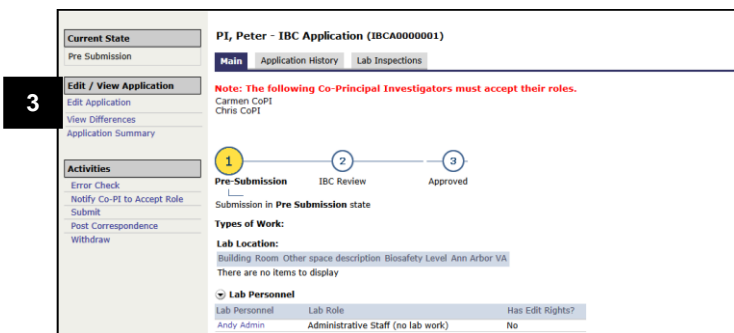
- Ready to Submit (for the PI)
- Need to Accept Role (for the Co-PI)
- Require Action by Study Team (for all)

**B.** The **In Progress** tab lists applications that were submitted.

**C.** The **Approved** tab lists applications that were approved.

2. Click the **Name** of the application to open the IBC Application Workspace.

### IBC Application Workspace



3. Click **Edit Application** to open the IBC application to continue data entry.

**Note:** "View Application" will display for approved applications or those in a non-editable state.

## IBC Application Workspace Features

The IBC Application Workspace is used to display key information about the application through the states from pre-submission to approval. The following highlights common referenced features and information.

### IBC Application Workspace – Pre Submission

**A** Current State: Pre Submission

**C** Note: The following Co-Principal Investigators must accept their roles.  
 Carmen CoPI  
 Chris CoPI

**B** Progress bar: 1 Pre-Submission, 2 IBC Review, 3 Approved

**Types of Work:**

**Lab Location:**  
 Building Room Other space description Biosafety Level Ann Arbor VA  
 There are no items to display

Lab Personnel	Lab Role	Has Edit Rights?
Andy Admin	Administrative Staff (no lab work)	No
Chris CoPI	Co-Principal Investigator	Yes
Larry Lab	Lab Manager	No
Peter PI	Principal Investigator	Yes

**Activities and Correspondence**

Activity	Description	Author	Activity Date
Posted Correspondence		Author, Andy	7/14/2015 2:26 PM EDT

**Application status** displays in the following fields:

- A.** Current State – shows overall status (e.g., Pre Submission, Approved)
- B.** Progress bar – presents a visual map towards approval
- C.** Note – shows alerts about required actions (e.g., Co-PI accept role) or pending changes in status (e.g., Amend or Renew in progress)

The **Main** tab displays key information for quick reference. This information populates as data is entered in the application and as the application goes through the approval process.

### IBC Application Workspace – Approved

**H** Current State: Approved

**D** Initial Approval: 7/9/2015 Last Approval: 7/9/2015 Expiration: 7/9/2018

**E** Types of Work:  
 rDNA or Synthetic Nucleic Molecules,  
 Infectious Agents, BSL1  
 Biological Toxins, BSL1  
 Plant Use

**F** Lab Location:  
 Building Room Other space description Biosafety Level Ann Arbor VA  
 BOYER BUILDING (BOYER) 200 BSL1 BSL2

Lab Personnel	Lab Role	Has Edit Rights?
Andy Admin	Administrative Staff (no lab work)	No
Chris CoPI	Co-Principal Investigator	Yes
Larry Lab	Lab Manager	No
Peter PI	Principal Investigator	Yes

**G** Activities and Correspondence

Activity	Author
Approved	Approver, Al
Submitted	Approver, Al

- D.** Approval and Expiration dates (Approved state only)
- E.** Types of Work
- F.** Lab information, such as location, biosafety level and lab personnel
- G.** **Activities and Correspondence** - shows the actions taken on the application or amendment to date and who completed the action, including links to documents, as applicable (e.g., approval letter)
- H.** Tabs provide specific information related to the IBC application
  - **Documents** – lists the documents uploaded to the application
  - **Application History** – lists amendments, renewals, and legacy applications
  - **Lab Inspections** – displays your OSEH inspection status

## Viewing your IBC Application

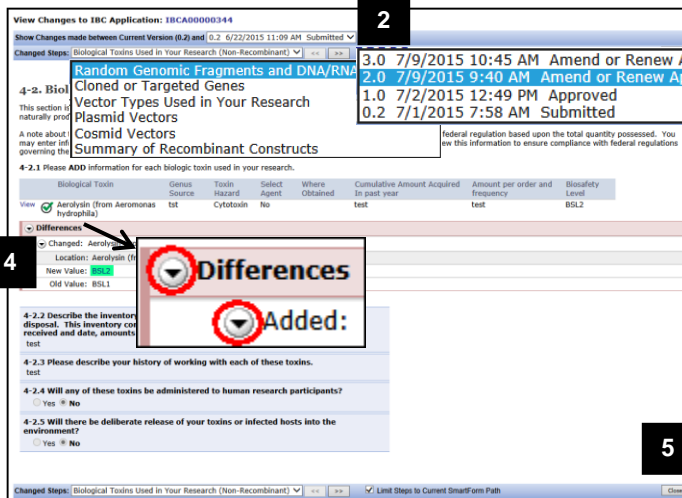
You will most often use the view options on the Application Workspace to review the current information in your approved IBC application prior to creating an amendment or renewing your application.

### IBC Application Workspace



1. Select the desired view option from the **Edit/View Application** menu.
  - **View Application**, which opens the entire application in a non-editable state. This allows you to see all questions in the application.
  - **View Differences**, which displays the changes made to the application between the current version and a previous version (e.g., initial submission, initial approval, approved amendment/renewal). (See **2 - 5** below).
  - **Approved Application Summary**, which displays only the information entered in the application. (See **6 - 7** below).

### View Differences



2. Select the application version you wish to compare to the current version from the **Show Changes made...** drop-down menu.
 

**Note:** An in-progress *amendment* will not appear in this list.
3. The **Changed Steps** drop-down menu shows the application sections that have changes. To navigate through the changes, select a specific page from the menu or click the **<<** **>>** buttons to go from one page to the next.
4. Click the expand/collapse buttons in the **Differences** table to see more details about a change.
5. Click **Close** to return to the IBC Application workspace.

## Approved Application Summary

6. Review the **Approved Application Summary** information, such as:

- Approval and expiration dates
- Approval notes if applicable
- A summary of research work included in your application

7. Click **OK** to return to the IBC Application workspace.

## Amending or Renewing your Approved IBC Application

Changes to or renewals of your approved IBC application are recorded by creating an amendment or renewal (AR). When you Amend or Renew your application, the system creates a copy that you will then edit and submit. Once your amendment or renewal is approved, any changes are copied over to your main IBC Application, as the record of your registration with the IBC.

### IBC Application Workspace – Main tab

1. Access your approved IBC application from the **Approved** tab in your Home Workspace (see steps above).

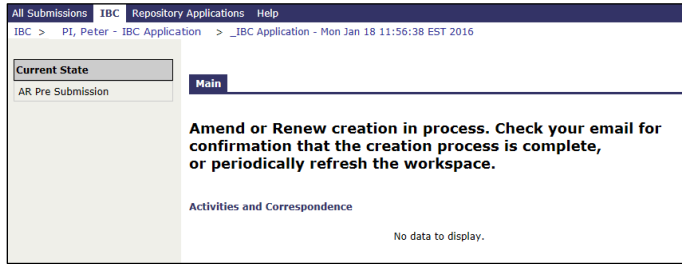
2. Click **Amend or Renew**.

**Note:** The Amend or Renew button is only available on an Approved application when no other AR is in progress.

### Amending/Renewing page

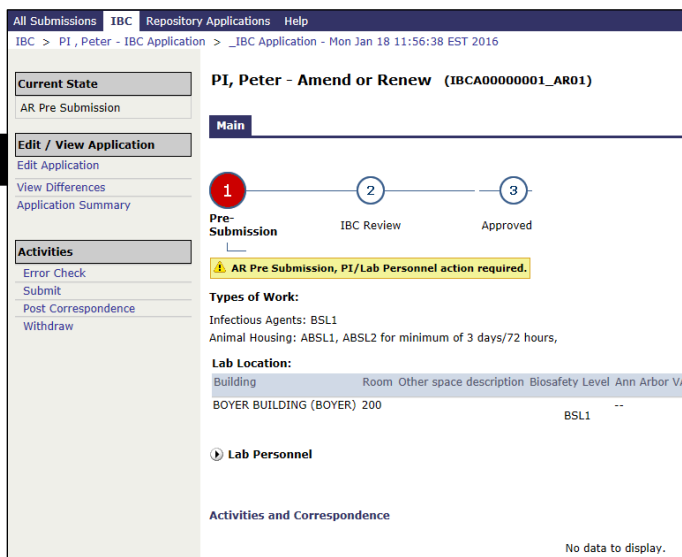
3. After reading the instructions, click **OK**.

## AR (Amend/Renew) Workspace



- Refresh the browser or check your email for confirmation that the Amendment or Renewal was created.

## AR (Amend or Renew) Workspace



### Notes:

- The application name contains **Amend or Renew**.
  - The ID number will have **\_AR** plus the sequential version number (e.g., 01) appended to the end.
  - If you need to return to the Application workspace, you can click the breadcrumb link. In this example "PI, Peter – IBC Application."
- Click **Edit Application**.
  - Note:** If you don't have any changes, then you can submit your application (see 8 below).
  - Edit answers to application sections/question as needed. For more information, see [IBC Application](#) support material.
  - After editing your application, you must **Submit** the changes. See [Submitting an IBC Application](#).
- Note:** After the changes are approved, the Current State will change from "AR Pre Submission" to "Approved".

## Finding your Amendments or Renewals

Approved applications are not edited directly. When you Amend or Renew your application, the system creates a copy that you will then edit and submit. The **Application History** tab lists the amendments and renewals created. If you have initiated an amendment or renewal but not yet submitted it, you can access it from the Application History tab.

### IBC Application Workspace – Main tab

1. Find your approved IBC application from the **Approved** tab in your Home Workspace (see steps above).

**Note:** **Amend or Renew in Progress** displays at the top of Main tab in the Application Workspace.

2. Click the **Application History** tab.

### IBC Application Workspace – Application History tab

ID	Name	Date Modified	State
IBCA00000001_AR02	Amend or Renew	6/25/2015 4:31 PM	AR Pre Submission
IBCA00000001_AR01	IBC Application	6/25/2015 4:30 PM	Withdrawn

ID	Name	State
IBC00001298	IBC Registration for PI. Peter	IBC Committee Review

3. The copied application name contains **Amend or Renew**. Click the **Name** to open the AR (i.e., Amend/Renew) workspace.

**Notes:**

- A. The ID number will have **\_AR** plus the sequential version number (e.g., 01) appended to the end.
- B. If you have a Legacy IBC Registration it will be listed on the Application History tab for viewing purposes.