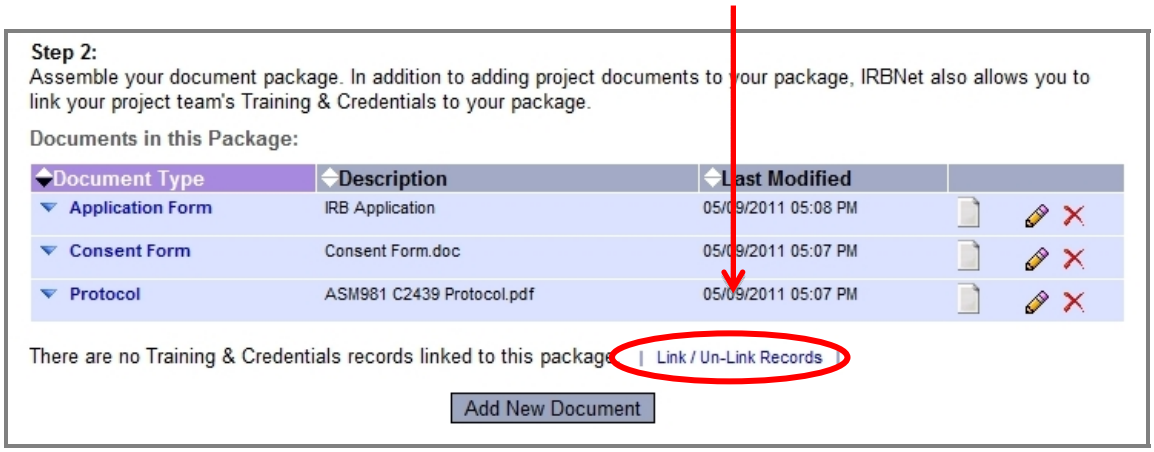
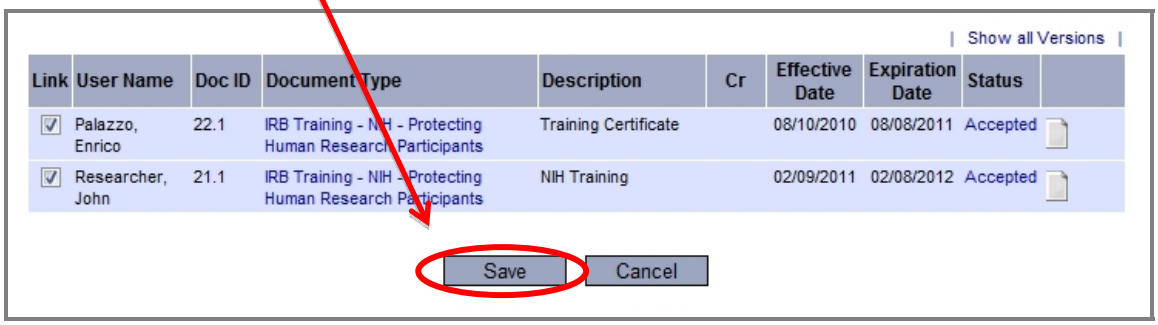
In addition to directly submitting documentation to your committee, you may be asked to provide training documentation during the protocol submission process. Having followed the previous steps, you may link any existing training documentation to a project package by following the steps below.

Link Project Team Credentials into a Project Package

1. Once the project has been created, ensure all necessary members of the research team have been shared access to the project within IRBNet (see R1 Energizer for a detailed walk-though of this process).
2. Click the Designer button to the left.
   Below the list of documents in the package, click the "Link / Un-Link Records" link.



3. On the list of available documents, check the box next to those that should be linked to this package and click Save.
   - *Note*: If required documentation is missing, make sure the researcher in question has access to the project and has followed the steps outlined in the first section.



4. Having linked all necessary training documentation, complete the process of submitting this package to the appropriate committee.

On a continuing basis you will need to keep your Training & Credentials documentation up to date within your User Profile. When you have an updated version of an existing document, or need to make changes for any reason, you should walk through the following process to ensure this updated information is available to the appropriate committee.

C. Keep Your Training & Credentials Current

1. Access your User Profile
2. Locate the appropriate document and click the Pencil icon.



3. Edit the Training & Credentials Record page as needed, click the Browse button to locate the updated version of the document.
4. Click the Update button.
5. Having attached the updated document, you now need to submit it to the appropriate committee. Click the Submit link and select the appropriate committee to submit to.

Note: Local SOPs may require that updated training information also be linked to a specific project package during time of Continuing Review or other submission event for that project. In that case, once you have followed the above steps, follow the steps outlined in the second section to link the documentation to a project package.

Points to Remember

Local SOPs may differ as to when and how to submit certain training documentation. Always check with your local committee office to confirm the correct process for managing your Training & Credentials.