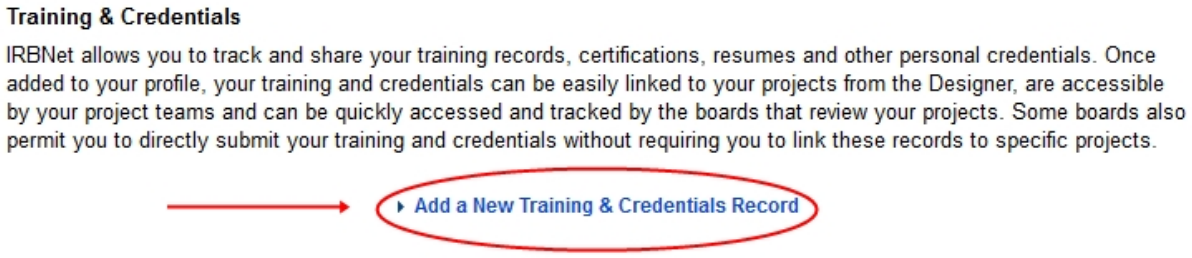
As an investigator or study team member experienced with or new to IRBNet, you will want to ensure your training and credentials are up to date in your User Profile, and filed with your local committee as required by their SOPs. The following steps walk you through how to manage your User Profile and meet the project credential requirements of your committee.

A. Upload and Submit Your Training & Credentials from your User Profile
B. Link Project Team Credentials into a Project Package
C. Keep Your Training & Credentials Current

A. Upload and Submit Your Training & Credentials from your User Profile

1. Log into IRBNet and click the User Profile link in the top right corner of the screen.
2. In the Training & Credentials section (bottom of the page) click the Add New Record button.



3. On the Training & Credential Record page, select the appropriate training and credential Document Type, enter the Effective Date of the document (ex. date of training certification) and any other applicable information, and then select the file from your computer by clicking the Browse button.
4. Once the correct file is selected, click 'Attach'.
5. From the User Profile page, click the "Submit" link (to the right of the new document listing you have just created).

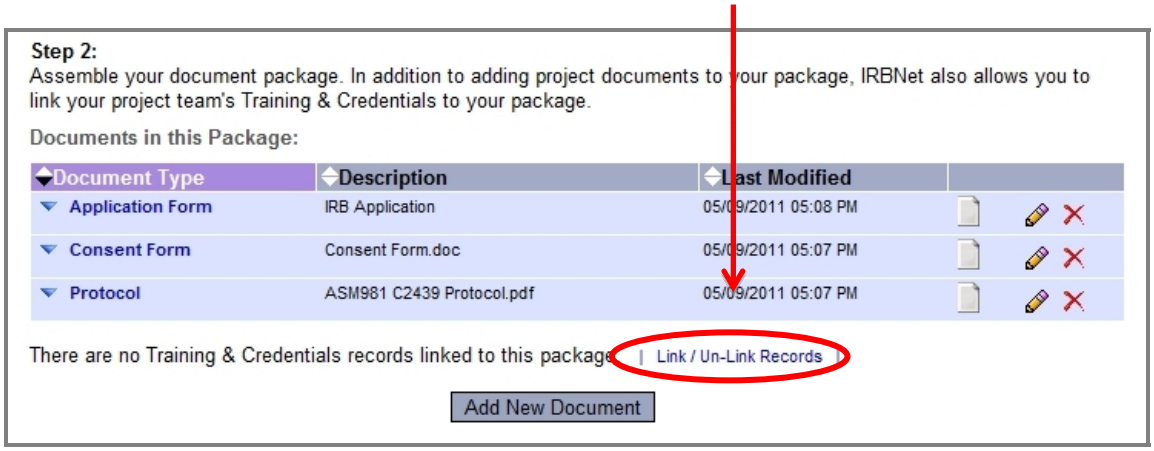


6. Select the organization to which you will be submitting your documentation.
7. Type a message to your committee's administrator and click the Submit button.
8. Repeat steps 1-7 for any other documentation you are required to submit based on your local committee SOPs.
9. If you need to 'update' a record, click the 'pencil' icon to the right, and follow instructions.

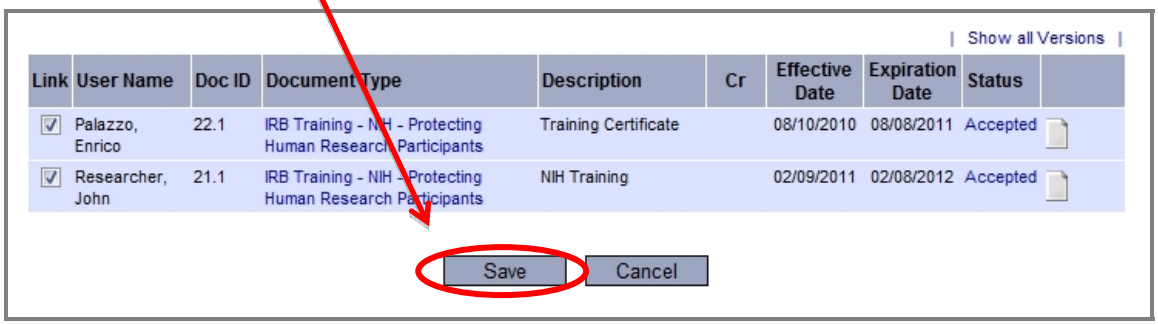
In addition to directly submitting documentation to your committee, you may be asked to provide training documentation during the protocol submission process. Having followed the previous steps, you may link any existing training documentation to a project package by following the steps below.

B. 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.