

Getting Started in Mentor IRB

To access Mentor

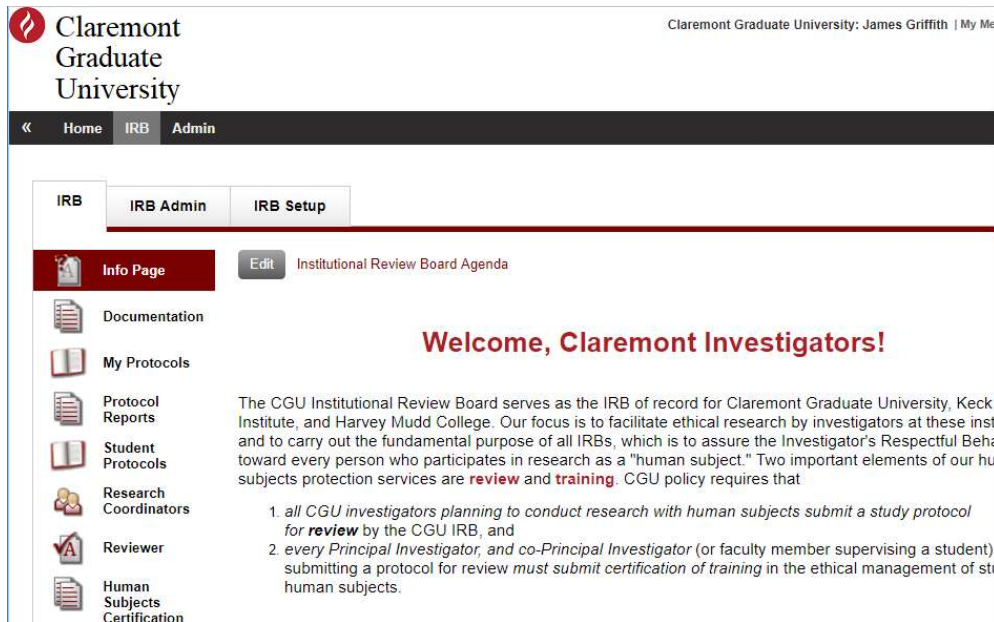
1. Click on the Axiom-Mentor icon on the CGU IRB website (<http://www.cgu.edu/irb>) or QuickLaunch box of your MyCGU portal (for CGU personnel).



2. This will load The Claremont Colleges Services single sign-on (SSO) portal.

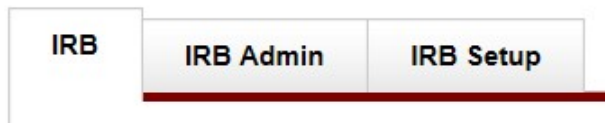
A screenshot of the Central Authentication Service (CAS) login page for The Claremont Colleges. The page has a white background with a dark blue border. At the top, it says "THE CLAREMONT COLLEGES" in a small, gray, all-caps font, followed by "Central Authentication Service" in a larger, bold, black font. Below this is a drop-down menu with "Claremont Graduate University" selected. Underneath are two text input fields labeled "Username:" and "Password:". A prominent purple "LOGIN" button is centered below the fields. At the bottom, there is a link for "Trouble logging in?" and a security notice: "For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!"

3. Enter your CGU network credentials and make sure you have selected “Claremont Graduate University” in the drop-down menu. (If you’re from one the other Claremont Colleges, use those network credentials and select that institution from the drop-down menu.)
4. If you are signed up for The Claremont Colleges Services dual authentication system, you will also have to go through DUO. Just proceed through this authentication as you normally do.
5. Welcome! You should land on the information page. We will be overhauling what information we present, and how we present it, based on what is most immediately useful to virtual visitors—your input is welcome! If you don’t see this page, you may need to click (or tap if you’re on a mobile device) on IRB in the black bar.



Creating a protocol

1. For most users, the page will look just like the picture above, but some may have more than one tab (if, for example, you serve on CGU's IRB).



2. Make sure you are on the IRB tab. In the menu on the left side of the page, click/tap on My Protocols.



3. If you already have protocols in Mentor (even if the IRB staff entered them on your behalf) they will be listed on this page. To create a new protocol, click/tap on the grey "Create New Protocol" button at the top of the page.



4. This loads the first of a relatively short set of questions based on federal regulatory categories for exemption and for expedited review. Based on your answers, it will load appropriate follow-up questions, make a preliminary determination of the appropriate level for review, then customized and partially complete the protocol form for you. When you have answered the requisite questions, Mentor will prompt you to exit the survey and load the protocol page.
5. **Students only:** Before loading the protocol form, Mentor will first open a window prompting you to select your faculty supervisor. Start typing in the last name, and the field should auto-populate.
 - a. If your faculty advisor is at one of the other Claremont Colleges, and not CGU, s/he may not yet be in Mentor’s database. In that case, please send, or ask the faculty member to send, an account creation request to irb@cgu.edu, along with his/her network ID.
 - b. After you select your supervisor, click “Continue” and Mentor opens what is essentially the cover page for your protocol—very similar to what we fill out on the front pages of our current application.
6. On the “Create IRB Protocol” page, fill out the required fields and the applicable additional fields.
7. Click on the “Save” button. This loads the protocol page—essentially the dashboard—for the protocol you just created. From here, you can complete and submit the protocol, sign it, request co-PI signatures, upload consent forms, instruments and other appendices, and, later, terminate the protocol, submit amendments, and more.

Completing and submitting a protocol

Near the top of the tab, just above and below the protocol title you created, you’ll notice some buttons and notices (See the image below.).

1. One of the notices is “**x Signatures Missing**”. The **x** = the number of PIs/Co-PIs who have not yet signed.
 - a. If you have not listed any co-PIs, **x = 1**.
 - i. Your electronic “signature” is required before the protocol can be submitted (RA/Co-PIs can enter/edit protocols, but they cannot sign for you.).
 - ii. To “sign”, find your name listed next to PI, and click on the “Sign Electronically” button next to your name.

Edit Copy Reviewers Upload Docs Undelete IRB Action Send Notificati

Exploring Student Veterans' Perceptions of Transition and the M Gap

Meeting Notes Administrator Notes Admin Only Notes Tracking Status A

Required questions not answered

Submit Protocol for Review Protocol created on: 06/28/2018 3:27 PM PDT Send Reminde

1 Signatures Missing

Message to IRB: FA has CITI, but PI does not. Received PI signature.

Research Outline

Admin

Assign Admin

Protocol ID

3155

Mark Protocol as Deleted

Inactive Personnel

- b. If you have co-PIs on the study (and you have listed them), you can notify them that they need to sign by clicking the “Request Signatures” button that appears directly above the notice. Mentor will send a link to the protocol, and they will follow the same procedure.
2. Another of the notices is “Required questions not answered”. This is referring to the questions about the details of your research proposal.
 - a. To answer those, click on “Research Outline” next to the green arrow (➡).
 - b. Click on the grey bar with “>> Protocol Outline” on it to expand protocol outline.

» Protocol Outline
 - c. All items in the protocol outline must be answered, but they don’t have to be answered in order or in a single sitting.
 - d. To begin filling out the study description items, click on a grey “Answer” button. This will open a window where you can enter your information.
 - e. Clicking on “Save Answers” will load the next unanswered question(s) in the same window.
 - i. E.g., if you just entered the response to the first question, but had previously answered the next two items, Mentor will now load the fourth item.
 - ii. Note that if you start answering later in the survey, when you click “Save Answers”, Mentor will load the earliest unanswered item next—it would take you back to earlier items.
 - iii. You can always close that window, then click directly on the grey “Answer” button for the items you want to answer next.
3. When you have answered all of the questions, click on “View Protocol” in the upper right corner of the page.

4. Back on the protocol page,
 - a. **Students:** click on **Submit Protocol to Faculty Supervisor** to submit your protocol for approval from your faculty supervisor, but before you do so, be sure you have uploaded your consent forms, recruiting materials, and data collection instruments. There is a large **Upload Docs** button in the row of buttons above your protocol title and a small **Upload Docs** below your protocol information. Click on that to upload and label your documents. When you click on “Submit,” Mentor will notify your faculty supervisor that your protocol is awaiting his/her approval. Once s/he has approved...
 - b. **Faculty/staff:** : click on **Submit Protocol for Review** to submit your protocol to the IRB office, but before you do so, be sure you have uploaded your consent forms, recruiting materials, and data collection instruments. There is a large **Upload Docs** button in the row of buttons above your protocol title and a small **Upload Docs** below your protocol information. Click on that to upload and label your documents. When you are ready click on “Submit” and...
5. Your protocol will automatically be submitted for IRB review, and Mentor should automatically generate a receipt email, confirming that we have received your protocol.

Editing a protocol

You may edit a protocol any time before it is submitted or after you submit and a supervisor (for students), reviewer, or IRB staff member requests revisions.

1. To edit a protocol, visit the “My Protocols” page by clicking on that link in the left navigation pane.
2. On the “My Protocols” page click on the title of the protocol you want to edit.
3. To edit the “cover page”, or basic, protocol information, click on the **Edit** button in the row of buttons at the top of the tab.
4. To change/add study documents (instruments, consent forms, etc.), click on the **Upload Docs** button in the row of buttons at the top of the tab.
5. To edit the study details descriptions, click on **Research Outline** next to the green arrow (➡).

Once you have submitted a protocol, we will then all interact with these protocols in the way we would for our normal roles, mediated by Mentor. This will allow us to do the same thing for the other processes Mentor is supposed to manage.

1. Administrators and support staff will conduct pre-reviews (or go through the mechanics for existing protocols) and request additional information from investigators, assign protocols to reviewers, or generate exempt reports.
2. Faculty advisors will receive and “sign-off” on student protocols.
3. Reviewers will use Mentor to review and comment on protocols (or, again for existing protocols, go through the mechanics) Investigators will submit requested revisions.
4. Administrators and the Chair will generate reports, agendas, and minutes, and so on...