

## Multisite Research Personnel and Institutions

In an extension of the work done in IRBIS over the summer to better classify External Personnel, we have made the following changes:

- Site Liaison designation on the Project Personnel screen
- Revisions section 5, the Multi-site Study Information screen:
  - o External site detail form and attached files
  - o Document collection for external researchers (CV, Ethics Training, and Medical Licenses)

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### Site Liaison Designation

On the Project Personnel screen: Internal and External staff now have a new column in which a site Liaison, or point of contact for questions related to that research site, must be designated. This is done by indicating using the radio button option in the first column.

Liaison	Last Name	First Name	Department Name	Role		
University of North Carolina at Chapel Hill (UNC-CH)						
<input type="radio"/>	Slattery	John	Office of Research Information Systems	Principal Investigator	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Hannah	Marcus	Office of Research Information Systems	Faculty Advisor	<a href="#">edit</a>	<a href="#">remove</a>
<input checked="" type="radio"/>	Cowan	Laura	Office of Research Information Systems	Co-investigator	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Fennimore	Chuck	Office of Research Information Systems	Study Coordinator	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Hollowell	Kelley	Office of Research Information Systems	Study Coordinator	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Hartman	Jeff	Office of Research Information Systems	Regulatory Associate	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Lovick	Derrick	Office of Research Information Systems	Regulatory Associate	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Saddler	Lori	Office of Research Information Systems	Research Assistant	<a href="#">edit</a>	<a href="#">remove</a>
UNC REX Healthcare						
<input checked="" type="radio"/>	Powers	Diane	UNC Hospitals - Rex	Study Coordinator	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Smith	Adrian	UNC Hospitals - Rex	Research Assistant	<a href="#">edit</a>	<a href="#">remove</a>
External Institutions						
Liaison	Last Name	First Name	Department Name	Role		
Duke University						
<input type="radio"/>	Peterson	Dan		External Site PI	<a href="#">edit</a>	<a href="#">remove</a>
<input type="radio"/>	Smith	Lisa		Co-investigator	<a href="#">edit</a>	<a href="#">remove</a>
<input checked="" type="radio"/>	Robertson	Thomas		Regulatory Associate	<a href="#">edit</a>	<a href="#">remove</a>
Wake Forest University						
<input type="radio"/>	Smith	Bob		External Site PI	<a href="#">edit</a>	<a href="#">remove</a>
<input checked="" type="radio"/>	Roberts	Jan		Co-investigator	<a href="#">edit</a>	<a href="#">remove</a>
Independent Investigators						
	Jones	Beth		Co-investigator	<a href="#">edit</a>	<a href="#">remove</a>
	Jones	Mike		Study Coordinator	<a href="#">edit</a>	<a href="#">remove</a>

Independent Investigators do not have a Liaison option, as they work as individuals and are the only point of contact by default.

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### Multi-site Study Information page

Additionally, section 5, the Multi-site Study Information screen has been revised to better classify multi-site studies.

When UNC-CH is taking or being asked to take responsibility for the oversight of research by individuals, groups or organizations outside of UNC-CH, the sites and their related personnel indicated on the Project Personnel section will be automatically populated on this page.

Institutions and Researchers listed on this page must now be entered via the Project Personnel section earlier in the application.

3. Is UNC-CH taking or being asked to take responsibility for the oversight of research by individuals, groups or organizations outside of UNC-CH? \* 

Yes  No

When a collaborator(s) outside of UNC-CH is (a) exercising authority or responsibility on behalf of a group or organization, (b) performing activities designated by collaboration for scholarly advancement (e.g., promotion, tenure) at a group or organization, complete the following information: \*

External Institution	Has or will the external institution agree to rely on the UNC-CH IRB?	Local Consent Forms	Local Context Worksheet	Agreement
Duke University	<a href="#">Click to add a response</a>			
Personnel	Role	Ethics	CV	MD License
Dan Peterson	External Site PI			
Thomas Robertson	Regulatory Associate			
Lisa Smith	Co-investigator			

First, you must **Click to add a response** for each site associated with the project. Here you will indicate if this external institution has agreed to rely on the UNC-CH IRB.

[close](#)

1. When a collaborator(s) outside of UNC-CH is (a) exercising authority or responsibility on behalf of a group or organization, (b) performing activities designated by a group or organization, or (c) using the collaboration for scholarly advancement (e.g., promotion, tenure) at a group or organization, complete the following information:

Name

Has or will the external institution agree to rely on the UNC-CH IRB? \*

Yes  No

If yes, a revised version of the External site detail form is displayed to collect some basic information about the external institution:

1. When a collaborator(s) outside of UNC-CH is (a) exercising authority or responsibility on behalf of a group or organization, (b) performing activities designated by a group or organization, or (c) using the collaboration for scholarly advancement (e.g., promotion, tenure) at a group or organization, complete the following information:

Name

Has or will the external institution agree to rely on the UNC-CH IRB? \*

Yes  No

If you have answered "Yes" please continue with the questions below. If you have answered "No", then please scroll down to the bottom of this screen and hit "Save". Note, additional sites can be added by repeatedly using the "Click here to add a response" option.

Is this a recruiting site that will require a local consent form? \*

Yes  No

Full legal name of external institution (e.g., University of Michigan-Flint): \*

Federalwide Assurance (FWA) number from external institution. If the institution does not have an FWA, enter 'N/A': \*

Contact information for any local IRB or ethics review committee representative who facilitates the execution of the IRB agreements. If there is no IRB or Ethics Review Committee, provide the contact information for an individual with knowledge of the institution's local context. (Name, Phone and Email):  
 If you do not include all of the required information (name, phone and email) your application will be returned to you. If the signatory official is also the contact person, state that. \*

External institution signatory official (name, title, email):  
 If you do not include all of the required information (name, title, email) your application will be returned to you. \*

Describe the role of this organization and/or its personnel in this study. Please specify if personnel will be obtaining identifiable private information or identifiable biological specimens or interacting/intervening with participants for research purposes. \*

For all external personnel, please attach a CV or resume. MD's and other licensed healthcare professionals (e.g., NP, PA) must also attach a copy of their current medical license.

For each site, there is now a specific spot to upload copies of Local Consent Forms, the Local Context Worksheet, and the site Agreement:

External Institution	Has or will the external institution agree to rely on the UNC-CH IRB?	Local Consent Forms	Local Context Worksheet	Agreement	
Duke University	Yes				<a href="#">edit</a>

To edit the information included in the External site detail form, select the edit option on the far right.

If you wish to transition existing files from the Attachments section to the new multisite section, please contact [IRBIS@unc.edu](mailto:IRBIS@unc.edu) and we would be happy to assist you. **Please do not move these files yourself by downloading and re-uploading, as the file history will be lost.**

### Document collection for external researchers (CV, Ethics Training, and Medical Licenses)

*If applicable:* As noted in the bottom of the External site detail form, For all external personnel, please attach a CV or resume. MD's and other licensed healthcare professionals (e.g., NP, PA) must also attach a copy of their current medical license.

Rather than upload these documents to the Attachments section, they can now be uploaded directly for each Researcher from this page by clicking on the green icon.

**Upload CV for Dan Peterson at Duke University**

>> Upload the "CV" document for Dan Peterson at Duke University

Click Browse to locate the attachment on your computer and click Upload Attachment.

Attachment:  D.Peterson CV 123125.docx

[Upload Attachment](#)

The icon will now note that this attachment requirement has been fulfilled for this researcher:

External Institution	Has or will the external institution agree to rely on the UNC-CH IRB?	Local Consent Forms	Local Context Worksheet	Agreement
Duke University	Yes			
Personnel	Role	Ethics	CV	MD License
Dan Peterson	External Site PI			
Thomas Robertson	Regulatory Associate			
Lisa Smith	Co-investigator			

If you need to upload a revised version of the CV, click on the document icon, select the current file, and choose the **Replace** option:

**View CV for Dan Peterson at Duke University**

>> View the "CV" document for Dan Peterson at Duke University

[D.Peterson CV 123125.docx](#)  
 Uploaded by: Laura Cowan On: 10/24/2017 At: 02:56 PM

[Manage Uploaded Attachment \(Mouse over links for instructional text\)](#)

Download
 **Replace**
 Rename
 Version History
 Delete

Attachments related to Independent Investigators should also be uploaded in this section, including a copy of the Confirmation Form and the Independent Investigator Agreement:

Independent Investigators		When a collaborator outside of UNC-Chapel Hill is not acting as an employee of a group or organization with respect to his or her involvement in the research as described above (GROUP or ORGANIZATION), complete the following information and upload an <a href="#">Independent Investigator Confirmation form</a> for each investigator:				
Personnel	Role	Ethics	CV	MD License	Confirmation form	Agreement
Beth Jones	Co-investigator					
Mike Jones	Study Coordinator					

These changes will allow us to make additional refinements to the IRBIS system as we move forward. We hope that these new tools will enable you to make revisions for multi-site studies more efficiently and keep better track of all required documentations associated with these complex projects.

If you have any questions or concerns. Please contact [IRBIS@unc.edu](mailto:IRBIS@unc.edu)