What We Will Cover In Today’s Session

• Introduction to the New WCG IRB Connexus
• Highlighting What’s New
• System Walkthrough
• New Submission Workflow
• System Transition “Need to Know” Information
• Resources and Support
WCG IRB Connexus Overview

- Simplified study submission and tracking process
- Track your review progress through a transparent process
- Incorporates most submission forms into a single interactive, online submission process
### Legacy MyConnexus vs. WCG IRB Connexus – Understanding the Key Differences

<table>
<thead>
<tr>
<th><strong>Legacy MyConnexus</strong></th>
<th><strong>WCG IRB Connexus</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sites would require access to study workspaces to submit a new PI</td>
<td>Users can submit a new PI without being granted access to the study</td>
</tr>
<tr>
<td>Administrators / Client Services would enter contacts</td>
<td>Users add contacts when they create submissions</td>
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<tr>
<td>Users required to search for forms outside of the system in several locations and formats</td>
<td>Commonly required forms integrated into submission process; directed to many other forms located in a central location (<a href="http://www.wcgirb.com">http://www.wcgirb.com</a>)</td>
</tr>
<tr>
<td>Workflow to make new submissions started from a study or site workspace</td>
<td>Make a Submission from the Dashboard and then select Submission Type</td>
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System Access & Signing In
2 Ways to Access the System

- **Direct Link:** [https://connexus.wcgirb.com](https://connexus.wcgirb.com)
- **Via the WCG IRB Website:** [http://www.wcgirb.com](http://www.wcgirb.com)
  Click "Login to WCG IRB Connexus" link in the top navigation
- **To Download Forms:** How to Submit>Download IRB Forms
Signing In

- Legacy MyConnexus users need to reset password and accept the Terms & Conditions upon initial sign in
- Use the same registered email address as you have in Legacy MyConnexus
- Your username is your email address
- New users can register using the Create a new account button
Dashboard and Access Roles Overview
This is your landing page and central hub for most WCG IRB Connexus activity.

Contains:

- **Notification** section
- **Make a Submission** button
- **Request Access** button
- **Track Submissions** area
  - Search
  - Tabs for callouts: Needs Action, In Progress, Drafts
  - Two different views, per your preference
Dashboard – Card and Table Views

Two different options for easily viewing submission/study details:
The **Make a Submission** button on the Dashboard allows you to start any type of submission.

Select one of the following options:

- Initial Review of New Protocol (not yet reviewed by WCG IRB)
- For existing studies:
  - Add Principal Investigator/Site (to submit a new PI for initial review)
  - Add Documents to Study/Site (for an ongoing/existing approved study)
You may request access to Studies and Sites.

- All managers of the target study or site will receive a notification and may accept or reject it.
- You will receive an email notification when your request has been accepted or rejected by a manager.
- Managers are responsible for ensuring users receive the appropriate permission level for their role.
- Managers may also invite users to join Studies or Sites.
- **NOTE**: Study workspace access is NOT NEEDED to submit a new PI for a multi-site industry-sponsored study.
There are different levels of access, each with specific permissions. Your permission level depends on how your manager adds you to a study or a site.

Legacy MyConnexus users will automatically have access to their same studies, sites, and submissions in WCG IRB Connexus.

The permissions levels are as follows:

- Manager
-Submitter
-Read Only
Site Roles (applicable to being a participating site on an existing protocol)

Site tasks each role may perform based on permission levels:

<table>
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<tr>
<th>Task</th>
<th>Manager</th>
<th>Submitter</th>
<th>Read Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage user access (add/edit/remove)</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make submissions</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>View and download submission documents</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>View and download outcome documents</td>
<td>✔️</td>
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Submission Process
For adding a new PI to a multi-site study already on file with WCG IRB, select the option below:
If you are adding a new site onto an existing multi-site study, ensure the submitter has the WCG IRB Protocol # to make the new PI submission (**study workspace access is not needed**):
Make a Submission: Initial Review of New PI

Study teams should enter the protocol ID for which they are submitting an initial new site/PI review, and click continue to proceed with the submission:

**Specify the study’s IRB Tracking ID**

- Find a Study

The IRB Tracking ID must be an 8 or 9 digit number.
Make a Submission: Initial Review of New PI Form

- Be sure to add **all** contacts who need to receive the day-to-day correspondence from WCG IRB
- You can add study coordinators or sponsor/CRO contacts
- **Note:** if you do not want all of your study staff receive notifications, but you do want them to have access to Outcome Documents, you can add them separately using the **Manage Contacts** tool
Make a Submission: Initial Review of New PI Form

- Add all locations where research is engaged
- Be sure to double-check the information for accuracy, as approved locations appear on the Certificate of Action
• Certificates of training are not required to be submitted to WCG IRB

• Only the CV and Medical License (if applicable) of the PI is needed, if not already on file with WCG IRB
Make a Submission: New PI Form

- Always mark “yes” to Institutional Services question
- Include the name of your organization and your Institution #
- UNC Institution #: 76615

Institutional Services
Will you conduct this research through an organization that has a contract or Master Services Agreement (MSA) to use WCG IRB (formerly Western IRB) for IRB Services?

- Yes
- No

Name of organization relying on WCG IRB (if known)

WCG IRB Institution # of organization relying on WCG IRB (if known)
Make a Submission: New PI Form

• UNC *does* have required consent language on file with WCG IRB; indicate Yes to first question

• Be sure to select the appropriate indication of how you plan to submit your consent form

• **For new site submissions:** UNC submitters will be sending in a Cover Page with required language elements and a tracked ICF (4th Option of “Other”)

**Consent Form Processing**

Does your organization have pre-approved consent language on file with the IRB?

- Yes
- No

Indicate how you want us to process consent forms:

- The IRB should insert the pre-approved consent language on file for my institution and the site-specific contact language provided in this submission form into the most recent IRB-approved consent template. (If you include a consent form with this submission, the IRB will not use it if there is a template on file.)
- The IRB should add site-specific contact language provided in this submission form to the currently approved template. (If you include a consent form with this submission, the IRB will not use it if there is a template on file.)
- I am submitting a consent with requested language changes shown as tracked changes
- Other
Make a Submission: Upload Required Documents

- The end of the form will show a Document Checklist for what you need to submit in order to make your submission to WCG IRB complete.
- Be sure to include your appropriate institutional sign-off.
Make a Submission: Review & Submit

- The last step before you submit will allow you to download a PDF of your completed online form.
- Click the **Submit for IRB Review** button in the bottom right-hand corner of the screen to submit for IRB Review.
- A confirmation ID will appear within a few minutes and is accessible via your Submissions landing page.
For adding documents to/submitting for an existing approved PI or study with WCG IRB, select the option below:
Make a Submission: Subsequent Submissions (Amendments, Promptly Reportable Info)

- Select the type of submission you will be making
- Follow the on-screen instructions/questions
- Upload documents and submit
Navigating Workspaces
WCG IRB Connexus Submissions Landing Page

- Displays all submissions
- Click **Submission Name** to view details
- Contains:
  - Search / Quick Filters
  - Table displaying all submission entries
Submission Details

• Displays submission status and other submission details
• Also displays (if applicable):
  o Submitted Sites
  o Submitted Documents
  o Outcome Documents
WCG IRB Connexus Sites (PIs) Landing Page

- Displays all **Sites** you have access to
- Click the PI Name for more details
- Contains:
  - Search function
  - Table displaying all site information, including the status of where particular documents are in IRB review
Site (PI) Details

- Displays in-depth site information
- Also displays (if applicable):
  - Site Submissions
  - Outcome Documents
  - Site Contacts
  - Manage Contacts
Manage Contacts

- Only accessible from Study or Site Details page for sites in which you have the Manager permission role
- View and manage current site contacts
- Invite contacts to join a site
- Approve or deny pending site access requests
WCG IRB Connexus Resources

- PDF version of the user guide
- "How-to-Videos"
- Quick Reference Guides
- Link to WCGIRB.com
Additional Items to Note
Additional Information

- All new users being transitioned from legacy MyConnexus to WCG IRB Connexus will need to reset their passwords and use the same email address to ensure access to your Studies and Sites.
- For security purposes, users must sign into WCG IRB Connexus to view any documents.
Additional Information

- Study-level access is not needed nor should be requested for submitting as a new site on an existing, industry-sponsored protocol
- You would only have study-level access if you are managing a new protocol and all sites
- Your approved PIs are accessible via the Sites option
We Are Here to Partner With You – Contact Us!

- Escalated/urgent issues:
  - Deena Horowitz, CIP
  - (253) 442-3137
  - dhorowitz@wirb.com

- For general questions, WCG IRB representatives may be reached at:
  - 855-818-2289
  - clientservices@wcgirb.com
Thank You