

SMART IRB EXCHANGE

Getting Started Quick Guide: Adding or Removing HRPP or IRB Staff Access to Exchange

The Exchange is primarily used by Human Research Protection Programs (HRPPs) or IRB staff. Institutions should create accounts for the individual(s) who oversee or facilitate single IRB review for the institution. If your institution will be a Reviewing IRB for a study, you may also consider adding IRB analysts to help manage the uploading of documents for Relying Sites.

There are two types of HRPP/IRB users in the Exchange: “Liaisons” and “Users”

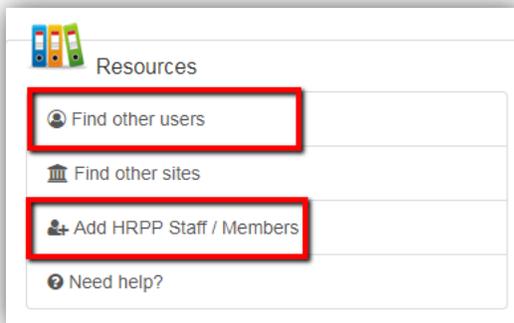
- **Liaisons have more permissions than Users.** Liaisons have the ability to add new HRPP and IRB staff liaisons and users, edit the Institutional Profile, create new studies, register for studies already created in the Exchange, and accept/confirm the Study-Specific Reliance Plan (SSRP).
- **Users** have the ability to monitor and update studies that were created in the Exchange and accept/confirm the Study-Specific Reliance Plan (SSRP). **Users do NOT have the ability to create or register for studies or add new HRPP or IRB staff liaisons or users.**

Permissions	Liaison	User
Create a new project	X	
Register for an existing project	X	
Add New Liaisons + Users	X	
Edit Institutional Profile	X	
View Institutional Profile	X	X
Accept/confirm Study-Specific Reliance Plan	X	X
As Reviewing, upload approvals for my site	X	X
As Reviewing, upload approvals for relying sites	X	X

(Note: study team member access is added when creating or registering for individual studies.)

Add HRPP Staff/Member:

1. From the dashboard, click “add HRPP Staff/Members”.
2. Enter the user’s **first name, last name, email address,** and phone number (optional) and press “Continue”.
3. Select the appropriate **user type (Liaison or User)**.
4. Click “Save” and the user will automatically receive an email and temporary password to login to the Exchange.

A screenshot of a 'create a user' form. The form has fields for 'First Name', 'Last Name', 'Email', and 'Phone'. Each of the first three fields has a red triangle icon and the word 'Required' below it. There are radio buttons for 'User Status' with 'Active' selected and 'Inactive' unselected. A green 'Continue' button is at the bottom right.

Remove Existing User:

To remove an existing user at your institution:

1. Click “Find other users” on the dashboard.
2. Click on their name to open their profile.
3. The last field on the profile is called User Status. Change the status to “Inactive” and then press continue and save.

A screenshot of a 'Users' list. At the top, there is a green bar with a '+ add HRPP Staff / Members' button and a note: 'You may create new HRPP users here. Study personnel (PI, coordinator) must be added on the appropriate study page.' Below this is a table with columns: Name, Email, Site, Role, and Phone. The first row shows 'Emily Serdoz' with email 'emily.sheffer@vanderbilt.edu', site 'Vanderbilt University Medical Center', and role 'Administrator'. A red arrow points to the 'Emily Serdoz' name in the table.