

Create a Protocol

Important: A protocol can be created, edited, and submitted by a Principal Investigator or Faculty Sponsor, Co-Principal Investigator, Student or Postdoctoral Investigator, Administrative Contact, or Other Contact. *However, before the protocol can be submitted, the Principal Investigator or Faculty Sponsor must log into the system and check the appropriate box in the Assurance section of the protocol.* This requirement exists as an electronic substitute for an ink signature from the Principal Investigator or Faculty Sponsor.

- 1) Log in to eProtocol with your CalNet ID & password at: <https://eprotocol.berkeley.edu>
- 2) UC Berkeley uses the IACUC and IRB modules of eProtocol. Click on the **IRB tab** to see your Investigator Homepage for IRB Submissions.



- 3) Click on the **Create Protocol** button to start a new application.

eProtocol » Investigator » Home

Welcome to UC Berkeley's eProtocol for IRB Submissions

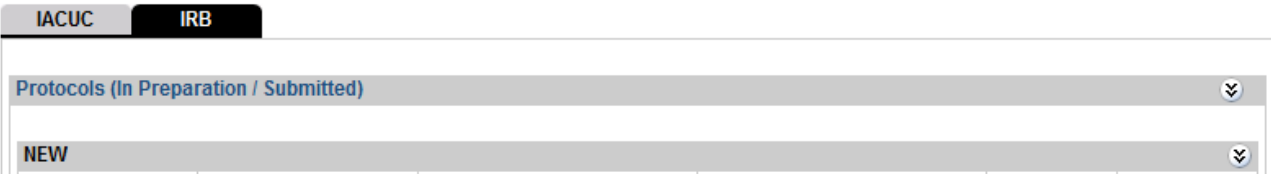
Important tips for success in eProtocol:

- Use **Mozilla Firefox** (for PC) or **Safari** (for Mac) as your web browser
- Make sure your browser's **pop-up blocker** is turned off
- Do not use your browser's back and forward arrows
- Only one person can edit a protocol at one time
- Save your work by clicking the save button at the top of your protocol
- Sign out when finished and close browser

Need Help? See eProtocol [Quick Guides](#) and [FAQs](#)
For additional resources, see [CPHS/OPHS Website](#)

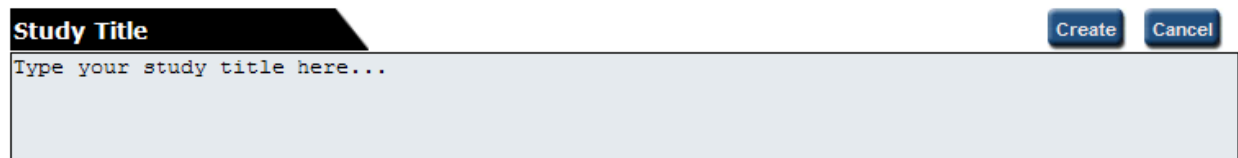
If you have any questions or need assistance, please call OPHS at (510) 642-7461 and we will be happy to help.

Click on Create Protocol to start a new application.



- 4) Enter your **Study Title** in the text box.

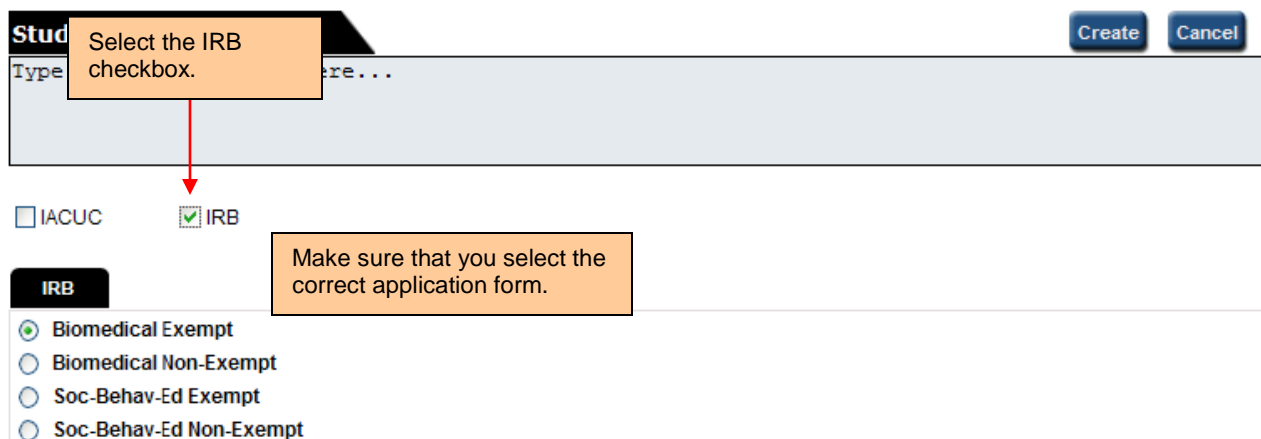
[Home](#) » Create Protocol



- 5) Select the **IRB checkbox** and a list of four (4) application forms will appear below. Click on the **radio button** next to the appropriate form.

Note: Make sure that you choose the correct form. If you create a protocol using the wrong form, you will have to start over.

[Home](#) » Create Protocol



- 6) Scroll down and **enter a Principal Investigator or Faculty Sponsor**, as follows:

- You will not be able to type into the name field. Click on the **binocular** icon to look up the person.
- In the Find User popup, enter the person's **first name** and/ or **last name**. Alternatively, search by the person's UID, which can be access through the [campus directory](#). Then, click the **Find** button.
- To select the person, click the **checkbox** next to their **name**, and then click on the **OK** button. Information from the CalNet Directory will merge into the fields under Principal Investigator or Faculty Sponsor. If this information is incorrect, you will be able to edit it (with the exception of the name field).

- 7) If you are NOT the Principal Investigator or Faculty Sponsor, **enter yourself** in the appropriate role. *You do not need to enter other personnel at this point.*

Principal Investigator or Faculty Sponsor*

Note: The PI on the grant funding the research, if any, must be a faculty member.

| | | |
|---|----------------------|----------------------|
| Name of Principal Investigator | | Title |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Email | Phone | Fax |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Department Name | Mailing Address | |
| Select One <input type="button" value="v"/> | <input type="text"/> | |

Click on the binocular icon to search for PI/Faculty Sponsor.

Student or Postdoctoral Investigator

Clear

Note: All Student/Postdoc Investigators must have a Faculty Sponsor. If you are a "possible researcher," If NOT a student or postdoc project, enter student(s) and/ postdoc(s).

| | | |
|--------------------------------------|----------------------|----------------------|
| Name of Student/Postdoc Investigator | Degree | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Click on the binocular icon to search for Student or Postdoctoral Investigator (if applicable).

- 8) Scroll to the top or to the bottom of the screen and click on the **Create** button. This will pull up the application form that you selected for you to complete.

[Home](#) » Create Protocol

Study Title

Type your study title here...

Click on the Create button to start your application form.

- 9) The first page of your application is the Personnel Information section. Complete screens from **Personnel Information** through **Assurance**.

Note: You must complete Personnel Information through Funding before you will be able to move back and forth freely in the application form. Responses in the first five sections will dictate which questions are required in Protocol Information

- Click on the **Next** arrow, to complete protocol application section-by-section. The system will save your data every time you go to a new section. Note: If you stay on one page for too long the system may time out and you will lose your work. Be sure to click the **Save** button periodically at the top of the protocol.
- You can closeout of the protocol at any time and access it again from your Investigator Homepage. Save the page you are working on before closing the protocol. Then, click on **Close** to closeout of the protocol.
- When ready to submit to OPHS/CPHS, see eProtocol Quick Guide [Submit Protocol Application](#).



Enter all UC Berkeley study personnel (if not previously entered) and relevant training information. Please read [eProtocol FAQs](#) for personnel role definitions.

Note: ONLY Principal Investigator or Faculty Sponsor can SUBMIT. Students, Postdoctoral Investigator, Co-Principal Investigator, Administrative O... Student or EDIT, but cannot submit.

Click on Next arrow to move to the next section.

- Personnel Information
- Vulnerable Subject Checklist
- Study Sites
- General Checklist
- Funding
- Protocol Information
- Assurance
- Check For Completeness
- Print View
- Event History

Principal Investigator or Faculty Sponsor*

Note: The PI on the grant funding the research, if any, must be the same as the PI on the protocol.

| | | |
|--------------------------------|-----------------------|---------|
| Name of Principal Investigator | Degree (e.g., MS/PhD) | Title |
| EMP-FACULTY TEST | | Test PI |
| Email | Phone | Fax |
| test@uclink.berkeley.edu | | |
| Department | Mailing Address | |
| Select One | | |

Enter UCB Status.

UCB status (select all that apply):

Faculty Postdoc Grad Undergrad Other

ALL PIs and KEY PERSONNEL on an NIH award are required to complete NIH training or an accepted equivalent. ALL STUDENTS engaged in human subjects research are required to complete CITI training. See [Training Requirements](#) for more details.

If applicable, please insert date (mm/dd/yy) of completion in appropriate box(es) below:

| | | |
|------|-----|---|
| CITI | NIH | Other Training (title & date completed) |
| | | |

Enter Training Information.