Additional Instructions from IRBNet:

Your project documents are managed on the Designer, where you can assemble your documents into "packages" for submission to your board.

The Package Navigator is accessible by clicking on the blue arrow just above the Package Notes. Using the Package Navigator you can quickly create a new package, switch between packages, or view all of the project documents in a single list to quickly find the most recent version of any document.

When assembling your documents into a package for submission to your board, you can add entirely new documents to your package, or you can "revise" 🖍 project documents that have already been submitted. "Revising" a document will create a new version of the document while maintaining prior versions in the Document Revision History   .

Keeping documents properly maintained in the Document Revision History helps to organize your project, makes it easier to see the evolution of important documents over time, and helps you find the most recent version of each document you need. If you find that you haven't organized your documents correctly, you can simply drag and drop a document into, or out of, a Document Revision History.

Revise an Existing Document. Use the "revise🖍 option when you want to add or create a new version of a project document that has already been submitted. IRBNet creates a new version of your document and retains all historical versions as part of your Document Revision History. You can view the historical versions of any document by clicking on the Document Revision History icon   .

Add a New Document. Use the "Attach New Document" or "Start a Wizard" (if available) option when the document you are adding is <u>not</u> a revised or updated version of an existing project document. The "new" document will not be tied to the Document Revision History of any existing document. Instead, it will have a new Document Revision History of its own.

When using the "Attach" option, you can attach multiple documents at the same time simply by selecting them in the browse window, and you can even drag and drop documents directly into your package.

What about copies of existing documents? Committee members and administrators often need to access copies of previously submitted project documents, such as a previously approved Consent Form, when reviewing your new or revised documents. Committee members and administrators can automatically access these older documents as needed from the "Documents

from Previous Packages" list. If you are unsure about the documents you are required to submit, you should contact your local administrator for more information.

<u>Examples</u>:

<u>What To Do:</u> Simply drag any document into a Document Revision History, or over a Document Revision History icon   , to add the document to that Document Revision History.

7. You want to remove a document from a Document Revision History.

   <u>What To Do:</u> Simply click the Document Revision History icon   to open that document's Document Revision History, and then drag the document out of the Document Revision History to remove it. The document will then have a new Document Revision History of its own. You can also add the document to a different Document Revision History by dragging it into the new one.