How to review an IRB protocol in Kuali Protocols (KP)

1. Follow the link sent to your CSU email account indicating that “You have been assigned as Reviewer” or log into KP by choosing “CSU Fort Collins” with your CSU EID and password: https://colostate.kuali.co/protocols/portal/protocols

2. On the left-hand side menu, click on “Protocols Assigned to Me”
3. Click on the protocol title link that you want to review:

<table>
<thead>
<tr>
<th>Practice Project 118</th>
<th>#511</th>
<th>IRB</th>
<th>Chance-Claine</th>
<th>Amendment</th>
<th>Exempt</th>
<th>April 29, 2021</th>
<th>Submitted for Review</th>
<th>BMR Institutional Review Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST Protocol</td>
<td>#04</td>
<td>IRB</td>
<td>Chromak, Angela</td>
<td>New</td>
<td>Full Board</td>
<td>March 11, 2021</td>
<td>Submitted for Review</td>
<td>BMR Institutional Review Board</td>
</tr>
<tr>
<td>Training Monday</td>
<td>#22</td>
<td>IAUC</td>
<td>Ganz-Hallett</td>
<td>New</td>
<td>Designated Member Review</td>
<td>April 06, 2020</td>
<td>Submitted for Review</td>
<td>IAUC DMR Determination</td>
</tr>
</tbody>
</table>

4. When you open a protocol that has multiple versions (revisions/amendments/renewals) you will see the option to compare versions in the top right-hand part of the protocol.

- By selecting the “Compare Versions” checkbox, users can easily compare versions and see changes within the protocol application.

   ![Compare Versions](image)

   - Text that has been added will show up green.
   - Text that has been deleted will show up red with a strikethrough.
   - The icon to the right of the change indicates the version number of the protocol when that change was made (in the example below, v4).
   - The version numbers being viewed are displayed at the top of the protocol screen, under the protocol title where it says Selected Version of Compare a Version.

Summarize the proposed changes to the protocol in lay terms.
5. Along the top of the protocol are tabs labeled, “Protocol”, “Reportable Events”, “Activity Log”, and “My Checklist” that bring up different sections of the protocol

• **Protocol** = the protocol you are reviewing

• **Activity Log** = a list of actions that have occurred or emails that were sent out for this protocol (similar to Event History in eProtocol)

• **My Checklist** = a reviewer checklist where reviewers will enter their recommendation; also includes optional reference checklists for committee members to use during protocol review.

• **Protocol Menu on the left side** = menu of protocol sections that link directly to that section; Action Items (aka comments) that have been entered in a specific section will be represented by yellow circle icon by the section title, if applicable

• **General Action Items on the right side** = menu of available actions; Action Items (aka comments) that have been entered as general comments will be represented by yellow circle icon by the General Action Items title, if applicable

6. For example: If you click on the “+ Action Item” icon next to the Project Overview question the following screenshot appears:
• You can enter your comment in the text box, then click “Post”—it will just post to that particular protocol.

• You don’t need to click the “Admin” tag to make your comment visible to IRB Admin

• You can click “Cancel” if you made a mistake and don’t want to keep that comment

**Please note:** the comments entered in these “Action Item” text boxes will be sent to the PI **EXACTLY** as written. If you wish for RICRO Staff to adjust the wording, please include that in your comment. Otherwise, KP will anonymize your comment and we send them as is. **This will apply for all protocol reviews, e.g. new, amendment, renewals.**

7. Once you have posted your action items, they will appear in the applicable section of the protocol in a yellow circle icon.
8. After you are done entering all of your “Action Items,” then you can click on “My Checklist” tab on the top, right side.

9. Complete the Reviewer Determinations and select the appropriate Reviewer Recommendation.
10. Instructions on how to complete your review will populate based on the recommendation you’ve made. Be sure to read the instructions that populate beneath the recommendation options in this section.

*Note: Reviewers should only use the “Mark Complete” option if the protocol is ready for approval. Otherwise, the checklist should just be saved and submitted, as it will be updated in subsequent review cycles until the protocol is ready for approval.*

10. Return to the protocol using the “Protocol” tab in the header menu. Once confirming that all Action Items have been added, select “Submit Review” to complete the review process.

A box appears and lists all of the Action Items you entered into the protocol. Note -- the formatting is not what the PI will see when we send it back to them—the formatting in each individual Action item will be retained.
Note: Even once you have submitted your review the protocol status will remain unchanged on your reviewer dashboard. To double-check that your review has been submitted, click into the protocol and notice that you no longer have a “Submit Review” option in the right hand menu.

Filtering your protocol

Advanced Filtering on “Protocols Assigned to Me” screen: you can choose which columns are visible to you and save the way the protocols are presented in the dashboard. If you click on “Choose Columns” and then make the eye-icon turn grey to blue, the column will appear on your dashboard.
You can name and save this filter. In the future, whenever you want to apply/use this filter, you go to “Saved Filters” and click on the filter you want to use. You can also click on the header of each column if you want to sort the protocols by that header.