

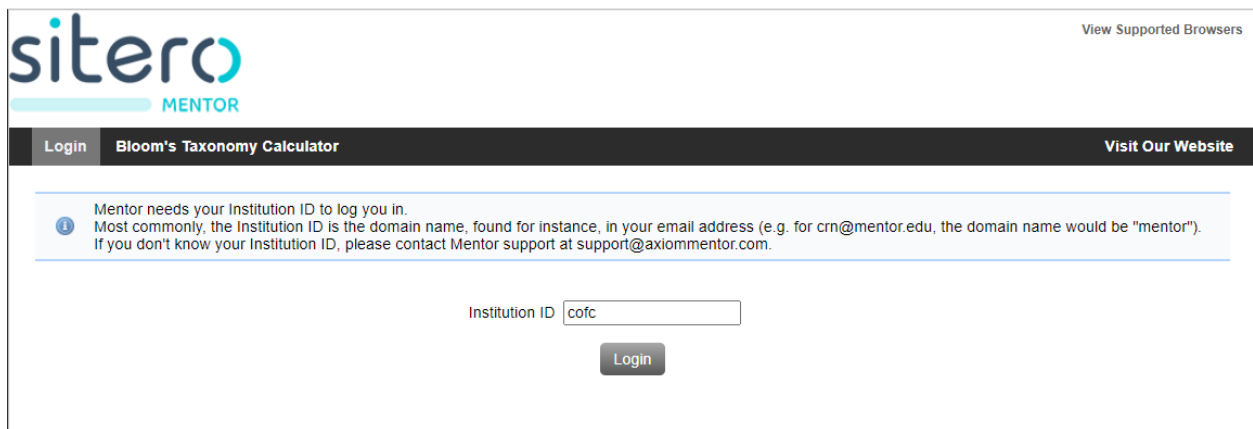
IRB eForm Application Instructions Faculty Sponsor of Undergraduate Student Researchers

LOGIN AND VIEW YOUR PROTOCOLS

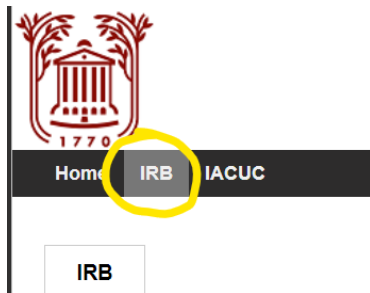
Login to Sitero Mentor using your CofC ID and password:

<https://www.axiommentor.com/login/shibLogin.cfm?i=cofc>

Institution ID: CofC



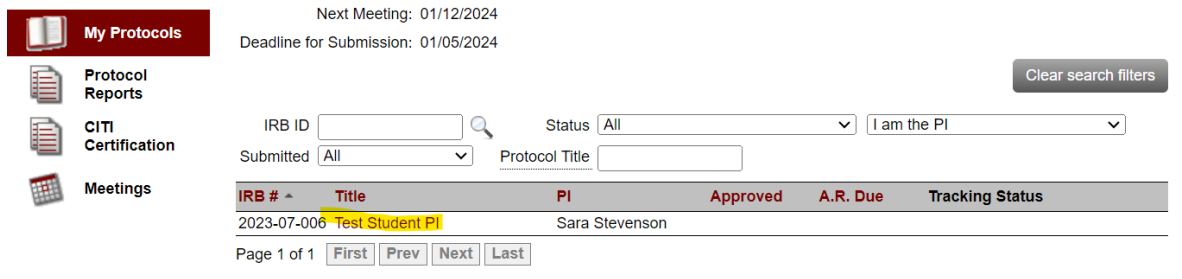
Once you are logged in, press the “IRB” tab in the top left corner.



Select the “My Protocols” option from the left navigation menu.



You can open any of your existing applications by pressing on the protocol title from the “My Protocols” screen.

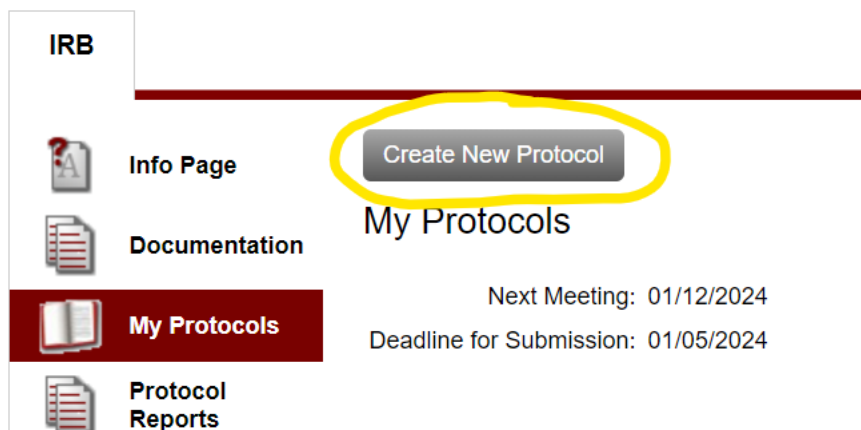


IRB #	Title	PI	Approved	A.R. Due	Tracking Status
2023-07-006	Test Student PI	Sara Stevenson			

START A NEW IRB APPLICATION

****Must be initiated by the undergraduate student's faculty sponsor. The faculty sponsor will serve as the PI of Record.**

To start a new protocol, the faculty sponsor must press "Create New Protocol" from the "My Protocols" tab. Undergraduate students may not initiate IRB applications. If you would like to work with the undergraduate student on the application questions, please email compliance@cofc.edu for a Word version copy of the questions.



This will pull up a window for you to put in the basic protocol information—title, personnel, dates, review category, consent waivers (if needed, see below).

Adding the Student Investigator to the Application

Type the first letters of the student's last name where it says, "Research Assistants." Select their name from the popup list, then click "Add." Repeat to add multiple students.

Research Assistants

Review Type

Review Type
Informed Consent
Informed Consent
Subjects

Select the review type from the options provided. If expedited or exempt, then select the review category from the options provided.

Review Type Exempt Review

Based On Please choose the option that you think best fits your project:

☐ (1) Educational Research

☐ (2) Tests, Surveys, Interviews

☐ (3) Benign Behavioral Interventions - Adults

☐ (4) Secondary Research Uses of Data or Specimens

☐ (6) Taste and food quality evaluation and consumer acceptance studies

☐ (8) Secondary research for which broad consent is required

Review Type Expedited Review

Based On Please choose the option that you think best fits your project:

☐ (1) Clinical studies of drugs and medical devices only when condition (a) or (b) is met

☐ (2) Collection of blood samples by finger stick, heel stick, ear stick, or venipuncture as follows

☐ (3) Prospective collection of biological specimens for research purposes by noninvasive means

☐ (4) Collection of data through noninvasive procedures

☐ (5) Research involving materials (data, documents, records, or specimens) that have been collected, or will be collected solely for nonresearch purposes

☐ (6) Collection of data from voice, video, digital, or image recordings made for research purposes

☐ (7) Research on individual or group characteristics or behavior

You can view more information about each category by hovering over the text with the review category:

☐ (1) Educational Research

☐ (2) Tests, Surveys, Interviews

☐ (3) Benign Behavioral Interventions - Adults

☐ (4) Secondary Research Uses of Data or Specimens

☐ (6) Taste and food quality evaluation and consumer acceptance studies

☐ (8) Secondary research for which broad consent is required

☐ Not Requested

☐ Not Requested

☐ Cognitively Impaired

(2) Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording) if at least one of the following criteria is met:

(i) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects cannot readily be ascertained, directly or through identifiers linked to the subjects;

(ii) Any disclosure of the human subjects' responses outside the research would not reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, educational advancement, or reputation; or

(iii) The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by Sec. _____.111(a)(7).

Waivers of Consent

If you are obtaining consent orally, select “Yes” to “Waiver of Documentation of Consent.”

If you need to waive parts or all of the consent, then request Yes to “Waiver of Consent” and select waiver type (full or partial).

Waiver of Informed Consent Not Requested

Waiver of Documentation of Informed Consent Not Requested

Subjects ☐ Cognitively Impaired

☐ Fetuses

☐ Minors (under age 18)

☐ Prisoners

☐ Students

Other Subjects Type

Number of Subjects

Searchable Keywords

Upload Protocol Description No file chosen

Allowed Extensions: doc, docx, pdf, xls, xlsx, ppt, pptx, jpg, png, gif

Upload Consent Form No file chosen

Allowed Extensions: doc, docx, pdf, xls, xlsx, ppt, pptx, jpg, png, gif

Message to IRB

Note that you do not have to upload the Protocol description at all, and do not need to upload the consent form from this menu.

The press Save.


When you click on the "Save" button below, your protocol record will be created. You can then upload additional files, and edit this form as needed. When your protocol is ready, click the "Submit Protocol for Review" button that will appear at the top of the view protocol page. That will formally submit your protocol to the IRB and notify the IRB coordinator that a new protocol has been received.


Save


Cancel


Requested


You have now started your IRB application and may proceed with completing the eForm and uploading the required attachments. Once you press save you will automatically be taken to the "Protocol Home Page," which can be accessed anytime by pressing on the protocol's title from the "My Protocols" tab.


 Info Page


 Documentation


 My Protocols


 Protocol Reports

 Student Protocols

 Reviewer (1)

 CITI Certification

 Meetings

 IRB Members

Edit Upload Docs Print / Zip

Descriptive Title Goes Here

Notice to undergraduate students and faculty sponsors:
Effective January 1, 2024, undergraduate students will no longer be allowed to submit new applications to the IRB as the PI. Faculty sponsors must be the PI of all undergraduate research IRB applications for new protocols that will be submitted after the College closes for winter break (December 20). Undergraduate student-led research should have the student listed the Co-PI and given "allow edit" access on IRB applications. See the [Students as Researchers](#) guidance for more information about this change. Note that this change does not change research review procedures for graduate students.

Please contact Sara Stevenson in the IRB office at compliance@cofc.edu if you have any questions.

Required Questions Not Answered

Submit Protocol for Review

Tracking Status: No Status Recorded

Message to IRB

Application Forms

Protocol ID
Panel

2023-12-006
No Panel Assigned

Messages (0) | Back

EDITING AND SUBMITTING YOUR IRB APPLICATION

If you are not already viewing the "Protocol Home Page," press on the protocol's title from the "My Protocols"

Edit the Basic Information

If you need to edit the Basic information (such as the level of review or the personnel), simply press on the "Edit" button located above the protocol title to open the window to make those changes.

Edit

Upload Docs

Print / Zip

Descriptive Title Goes Here

Complete the "Application Forms"

From the “Protocol Home Page,” press on “Application Forms,” located twice on the protocol main page and has a green arrow next to it. This will take you to the main text part of the application.

Message to IRB

Application Forms

Protocol ID2023-12-006
PanelNo Panel Assigned
PI Sara Stevenson (Click here to view PI Docs)
PI TypeGeneral Faculty
External PIsList non-CoFC Personnel here
Review TypeExempt Review
Approval StatusExempt Review Requested [Withdraw Protocol from Review](#)
Based On(2) Tests, Surveys, Interviews
Submitted BySara Stevenson
Proposed Start Date12/21/2023
Consent WaivedNot Requested
Waiver of Documentation of Informed ConsentNot Requested
Number of Subjects100

Application Forms

Upload Docs

Survey Instruments
12/14/2023
Revisions1.pdf

Additional Documentation
12/14/2023
Revisions2.pdf

Consent Form
12/14/2023
Revisions2.pdf

Amendments

Press on each heading to expand to see the questions.

Application Forms

2023-12-006. Descriptive Title Goes Here
PI: Sara Stevenson

View Protocol Page

☐ Expand All Sections

Protocol Narrative
Required Questions Unanswered: 20

Personnel
Required Questions Unanswered: 2

View Protocol Page

Press the gray “Answer” button to begin the Application Forms text.

* **Rationale, Objectives and Significance**
Provide a brief statement describing the importance of the proposed research.

Answer Required

Answer

* Describe the benefits of the proposed research to science and/or society.

Answer Required

Answer

Provide your response in the text box and press “Save Answers” to continue to the next question. Press “Save Answers and Close” if you would like to return to all the Application Forms questions. Press Cancel to exit the response menu without saving your work.

Answer:

Save Answers

Save Answers & Close

Cancel

Application Forms

[View Protocol Page](#)

2023-12-006. Descriptive Title Goes Here

PI: Sara Stevenson

☒ Expand All Sections

» Protocol Narrative

Date Last Updated: 12/14/2023 2:56 PM EST

» Personnel

Date Last Updated: 12/14/2023 2:59 PM EST

Add Student Researcher(s) from the Application Forms

Press the Arrows next to Personnel. Then press the “Add Personnel” button:

» Personnel

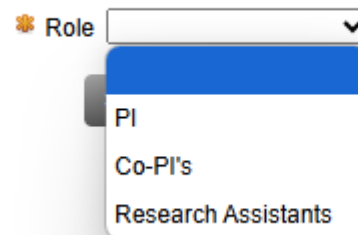
Date Last Updated: 05/19/2025 2:48 PM EDT

Add Personnel

Edit Section Data

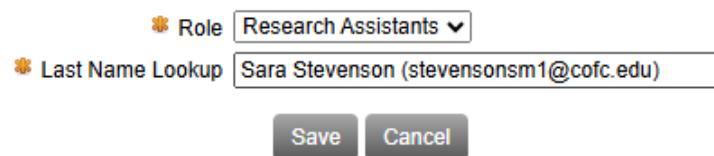
Then select “Research Assistants” from the drop-down menu for the Role:

Add Personnel to Protocol

A screenshot of a dropdown menu for the 'Role' field. The menu is open, showing three options: 'PI', 'Co-PI's', and 'Research Assistants'. The 'Role' label is to the left of the dropdown.

Then type in the student's last name in the "Last Name Lookup" and select their name when it appears. Then press save.

Add Personnel to Protocol

A screenshot of the 'Add Personnel to Protocol' form. It includes a 'Role' dropdown menu set to 'Research Assistants', a 'Last Name Lookup' text field containing 'Sara Stevenson (stevensonsm1@cofc.edu)', and 'Save' and 'Cancel' buttons at the bottom.

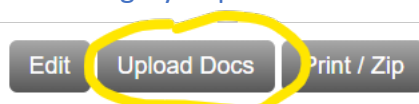
Once you have filled in all the required information, press "View Protocol Page" to return to the Protocol Home Page.

Note: The students' CITI Program training data will be associated with their CofC email account and will be listed with their information in the Personnel Section of the Application Forms. Approval of the IRB application cannot be provided until all personnel listed have completed the CITI training.

Upload Attachments

The Application Forms section will prompt you to provide most required uploads. However, if there are additional items that need to be included, they can be uploaded from the Protocol Home Page.

Select the gray "Upload Docs" button at the top of the page, just above your protocol title.

A screenshot of the top navigation bar showing three buttons: 'Edit', 'Upload Docs', and 'Print / Zip'. The 'Upload Docs' button is highlighted with a yellow circle.

Descriptive Title Goes Here

You can upload the attachments individually by selecting "Choose File" and choosing the file from your documents to upload.

Upload Documents

Upload Multiple Files

File type: Additional Documentation

File: Choose File No file chosen
Allowed Extensions: doc, docx, pdf, xls, xlsx, ppt, pptx, jpg, png, gif

Rename File to:

Leave blank to use original file name

File Version & Date: (40 characters max. Format: v. #. # MM/dd/yyyy)

Save Cancel

Then select the File Type from the drop-down menu

Upload Documents

Upload Multiple Files

File type: Additional Documentation

File: Consent Form
Debriefing Document (doc, docx, pdf, rtf only)
Recruitment Materials (doc, docx, pdf, rtf only)
Resources for Research Participants (doc, docx, pdf, rtf only)
Revised Consent Form (PI)
Site Permission Letter (doc, docx, pdf, rtf only)
Survey Instruments (doc, docx, pdf, rtf only)

Rename File to:

File Version & Date: (40 characters max. Format: v. #. # MM/dd/yyyy)

Save Cancel

And Press "Save" to continue.

Or you can upload all files at once by selecting the text "Upload Multiple Files"

Upload Documents

Upload Multiple Files

File type: Additional Documentation

File: Choose File No file chosen
Allowed Extensions: doc, docx, pdf, xls, xlsx, ppt, pptx, jpg, png, gif

Then "Upload Files" to select from your documents.

Upload Multiple Files

Click the Upload Files button and select each file. You cannot select

After selecting the files, each file will be assigned a File Type. After the File Types have been set, click

Upload Files

Allowed Extensions: .doc, .docx, .pdf, .xls, .xlsx, .ppt, .pptx, .jpg, .png, .gif

Once the files are selected, choose the File Type from the drop-down menu and press save to continue working on the protocol.

Upload Multiple Files

Click the Upload Files button and select the files you want to upload. You may select more than one file by holding the CTRL (Command) key down and select each file. You cannot select multiple files from different folders to use this function.

After selecting the files, each file will be listed with a Select File Type button. After the File Types have been set, click the "Save" button.

Upload Files

Allowed Extensions: .doc, .docx, .pdf, .xls, .xlsx, .ppt, .pptx, .jpg, .png

File Name (Click to Rename)	Select File Type
Revisions2.pdf	Additional Documentation Approved Consent Form Approved Protocol Consent Form Debriefing Document (doc,docx,pdf,rtf only) Notifications Recruitment Materials (doc,docx,pdf,rtf only) Resources for Research Participants (doc,docx,pdf,rtf only) Reviewer Notes Revised Consent Form (IRB) Revised Consent Form (PI) Site Permission Letter (doc,docx,pdf,rtf only) Survey Instruments (doc,docx,pdf,rtf only)
Revisions1.pdf	Select File Type

Save Cancel

SUBMIT THE APPLICATION FOR REVIEW

From the Protocol Home Page, press the "Submit for Review" button. Note that this action will not be available unless all required questions in the Application Forms are completed.

Info Page Edit Upload Docs Print / Zip

Documentation Descriptive Title Goes Here

My Protocols

Protocol Reports

Student Protocols

Reviewer (1)

CITI Certification

Meetings

IRB Members

Submit Protocol for Review

Message to IRB

Application Forms

SUBMITTING REVISIONS

If revisions are required, they will be communicated via email through the eForm system.

Revisions Required - IRB ID: 2023-12-006



Research Compliance <noreply@axiommentor.com>

To: Stevenson, Sara M.



3:05 PM

This sender noreply@axiommentor.com is from outside your organization.

To: Sara Stevenson

From: Sara Stevenson, IRB Coordinator

Subject: Protocol #2023-12-006

Date: 12/14/2023

The following revisions are required by the IRB to your protocol #2023-12-006 - Descriptive Title Goes Here.

Protocol Narrative

QUESTION:

Does this project involve more than minimal risk for the participants? Minimal risk is defined as "no greater risk than that encountered in everyday life."

COMMENT:

Need to provide more information about where the survey will take place.

[Login](#) to the eForm system to submit these changes. If you have any questions, please feel free to contact me.

Once you have reviewed the "Revision Required" email, open your protocol and the Application Forms to begin making changes. Sections that have comments that require revisions will be highlighted in Green Press "Edit Answer" to make changes to sections where revisions are needed. Check the box next to "Submit Revisions for Review" once revisions to each section are made.

Add/Edit Answers

* Methods and Procedures

What will the participants do, and/or what will be done to them? Be specific in describing the procedures.

For exemption category 1 research only: refer to the Exemption Category 1 Research Guidance.

Answer: Current Word Count: 1

test

[Reader Comments](#)

☐ [Submit Revisions for Review](#)

* Does this project involve more than minimal risk for the participants? Minimal risk is defined as "no greater risk than

Answer: Yes

☒ No

[Reader Comments](#)


☐ [Submit Revisions for Review](#)

Edit Answer

If new/revised uploads are required, follow the steps above for uploading documents.

Once changes have been made to the Application Forms, press “View Protocol Page” to return the Protocol Home Page. From there, check the box where it states, “Submit Revisions for Review”

☐ **Submit Revisions for Review**

 **Application Forms**

APPROVAL

The approval letter will be sent via email, and the IRB Chair and your department chair will be cc'd on the notification. Interaction with participants cannot begin until the approval is obtained.

As PI, you are responsible for any follow-up reporting.