

## Quick Reference Guide: Convert Paper Approved IRB Studies to Electronic through ERGO

### Before you begin:

If you have an approved paper study that is coming up for continuing review or requires modifications and it is NOT a cancer study, you MUST begin the process to convert the study to eIRB starting through ERGO.

Make sure you have delegation by your PI to create an ERGO form.

Do not create a new protocol in Velos/ eIRB for the existing paper study.

### Here is how it works:

Open studies are available in ERGO. In order to import these into eResearch you MUST do so through ERGO.

Once you complete the ERGO form, your study is created in Velos. The PI, and all delegates will be notified by email of the Velos study ID. Log in to Velos and complete and update the remaining required fields and add a study status of **IRB- Submission Initiated**, This will push the study to eIRB.

For more information:

<http://www.utsouthwestern.edu/>

## To log in to eResearch

Go to the ERGO Research Portal:  
<http://ergo.utsouthwestern.edu>

**Note:** Configured your Internet options to allow for Pop-ups, and disable any third-party toolbars.

### Step 1: Log in to ERGO

1. Click the **ERGO Research Portal** button.
2. Type your **User Name** and **Password** in the corresponding fields.
3. Click **LOGIN TO ERGO**.
4. Select your delegated PI.
5. Click **Create/Edit Form**.

**Note:** You must have PI delegation to create an ERGO form.

6. Click the **IRB—Study IRB Import** link. The IRB Import page displays. Carefully read the **Instructions**.
7. To select a study, click the **Select/ Search for Study** magnifying glass icon under **IRB Study Information**.
8. Click the **Select** link next to the study you wish to import.
9. Verify the displayed information is correct, If the information is incorrect, stop the process and contact IRB (8-3060). If the information is correct, click the **Approve & Submit** button.

An email response is generated from ERGO to all study delegates containing the Velos Study ID.

## Step 2: Log in to Velos

1. Type your **User Name** and **Password** in the corresponding fields.
2. Click **Login**.
3. In the **Search By** field, enter the Velos Study ID **listed in the ERGO email**, and click **Enter**.
4. On the Summary page, complete the required fields designated by asterisks. **Note:** If necessary, update the Specialty field as it defaults to “Other” during the ERGO conversion process.
5. Enter your **e-Signature** and click **Submit** to save changes.

### To view or edit Study Status when submitting the study to IRB

1. From study Summary, click the **Study Status** link.
2. Click **Add New Status**.
3. Verify or update required fields:
  - Organization - select **UT Southwestern Medical Center and Affiliates**
  - Status Type - select **IRB**
  - Study Status - select **IRB Submission Initiated**
  - Documented by - defaults your name
  - Status Valid From - enter today's date
4. Enter your **e-Signature** and click **Submit**.

When the study status changes to **IRB - Draft Study Created**, the study is now in eIRB and you can continue the process of submitting your study to the IRB.

### Step 3: Log in to eIRB

1. Type your **User Name** and **Password** in the corresponding fields.
2. Click **Login**.
3. Click the **My Home** link at the top right hand corner of the screen.
4. Locate the study in the **My Tasks** tab.
5. Click the hyperlinked study title to access the study work space.
6. Click the **Edit Study** button to complete the form.

### Contacts

Thomas Spencer: 214-645-7143  
Thomas.Spencer@UTSouthwestern.edu

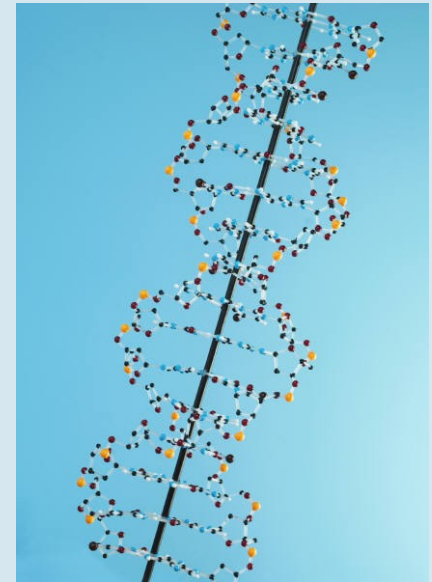
AIS Training email:  
aistrain@UTSouthwestern.edu

IRB Office: 214-648-3060

HELPDESK—214-648-7600

### eResearch Link

<http://www.utsouthwestern.edu/eResearch>  
08/26/2010



**eResearch  
ERGO Study  
Conversion  
Process  
08/26/2010**