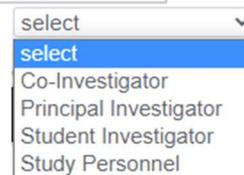# Streamlyne IRB Tip Sheet

Adding and Removing Study Personnel

1. Study personnel can only be updated in a new protocol submission or during an amendment submission. If the protocol has already been approved by the IRB an amendment must be created to make changes to the study personnel.

2. Navigate to the pending/in progress protocol or amendment in Streamlyne.

3. To add project personnel in addition to the Principal Investigator, click on the **Personnel** tab in the left panel. All study team members will be added in this tab. For student research, the student must be added as Student Investigator under Protocol Personnel tab.
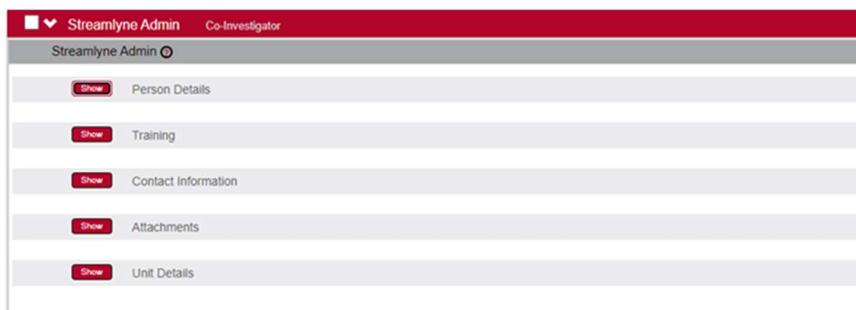

3. Click the arrow next to the **Protocol Role** field to select the team member's role from the dropdown list.
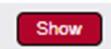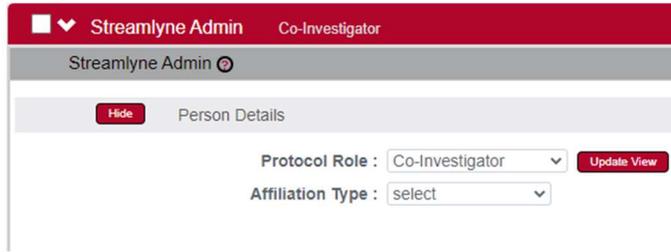

4. Click the **Add** button to complete this action.

Result A new section will be created for each person with subsections for Person Details, Contact Information, Attachments and Unit Details.

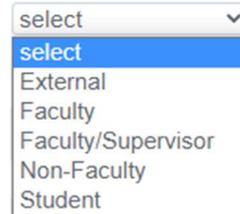**5.** Click on the personnel name to expand the user section for each user.

6. Click the Show button to expand the **Person Details**.

7. Click the arrow next to the **Protocol Role** field to edit if necessary.

8. Click the arrow next to the **Affiliation Type** field to select the appropriate affiliation from the list. Note: If Student is selected, a Faculty/Supervisor must also be identified in the Protocol Personnel tab.
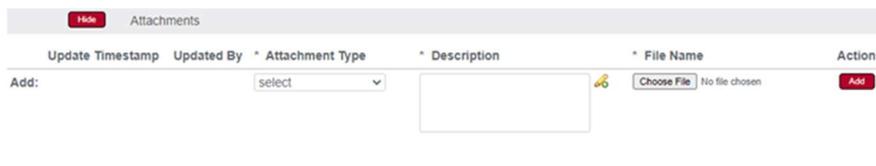

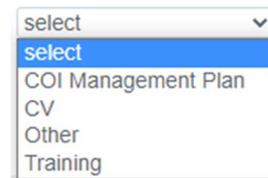**9.** Click the Show button [Show] to view the **Training**.

10. If the individual has completed the CITI UNM Main Campus Researchers training, the information will appear here. If the training is expired or no training is noted, have the individual complete the training. Once the CITI training is complete, the information will automatically appear the following business day.

11. Click the Show button to expand the **Contact Information**. Update default contact information if necessary.

12. If you need to attach personnel-specific documents, such as a CV (required for PI) or COI Management Plan, click the Show button to add **Attachments**.

13. Click the arrow next to the **Attachment Type** field to select the appropriate attachment type from the list.

14. Enter a description for the attachment in the **Description** field.

15. Click the Browse button to access files on your computer. Follow your operating system's prompts.

16. Click the **Add** button [Add] to add the Attachment.

Note If you find that you have added a team member in error or would like to remove a team member, simply click the checkbox on the section header, and then click the Delete Selected button at the bottom of the page.

17. Permissions tab allows PI and Initiator to customize what type of access the study personnel has to the Streamlyne protocol.

18. Click on the tab header to access the **Permissions** section.

Permissions

19. The protocol's default Aggregators (or editors) will be identified as the Principal Investigator and the Initiator (if different from the PI). An Initiator can also edit access to users who might not normally have access to protocol documents. This is especially useful to a researcher who would like to turn over Aggregating (editing) Rights to students, coordinators, or other protocol personnel. This feature is also commonly used to grant ad hoc Viewer Rights to users who do not normally have access to protocols.

20. Scroll down to the **Users** section. If it is not already expanded, click on the header to expand the section.

❤ Users

21.

	* User Name	Full Name	Unit #	Unit Name	Role	Actions
Add:	🔍				unassigned ∨	Add
1	vflint@unm.edu	Valerie Crooker-Flint	798A	VP Resrch & Econ Devlpmnt VPRED	Aggregator PI	Edit Role

22. If you need to add an ad hoc user, click the magnifying glass next to the User Name field to search for and select the correct value.

23. Click the arrow next to the **Role** field to select a permissions level for the ad hoc user.

unassigned ∨
unassigned
Aggregator
Viewer
Protocol Deleter

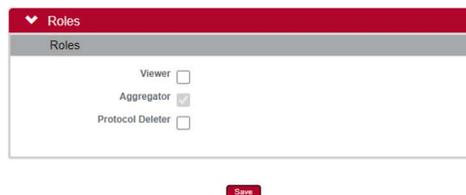**24.** Click the **Add** button to complete the action.

Add

25. Repeat Steps 3 through 5 until all ad hoc users are added to the protocol.

26. If you need to remove a user, click the **Delete** button.

27. If you need to change the nature of a user's access to the protocol, click the **Edit Role** button next to the user's name. Otherwise, skip to the next section.

Edit Role

28. Streamlyne will display a pop-up window listing the three permissions levels for a protocol. Indicate whether the user should have permissions to view the document, to aggregate (edit) document data, or to delete the document by clicking the corresponding checkbox. Alternatively, you also have the option to remove defaulted or previously granted permissions by unchecking the corresponding boxes.

❤ Roles

Roles

Viewer ☐
Aggregator ☑
Protocol Deleter ☐

Save

29. Click the **Save** button to commit your changes.