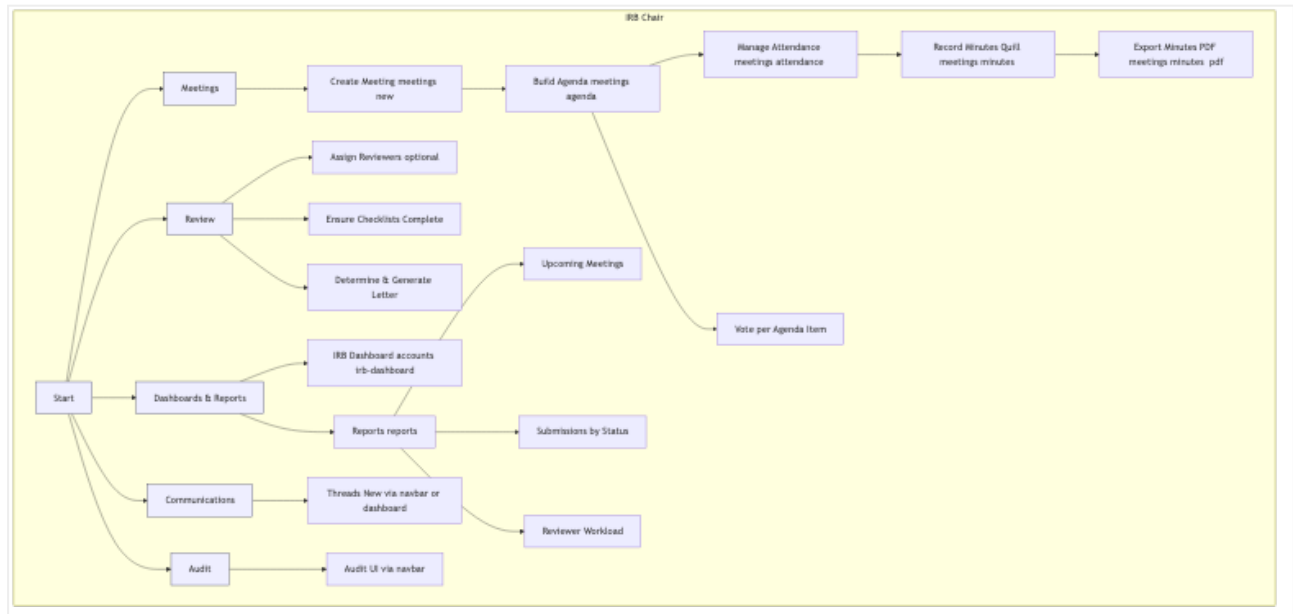


# IRB Chair User Manual

This guide covers the core features available to IRB Chairs.

## Mermaid Diagram



## Your Role

- Provide oversight for review activities
- Manage meetings (with staff)
- Record determinations and sign off on decisions
- View reports and workload

## Access & Permissions

- Member of group: `irb_chair`
- Full access to Review and Meetings features (shared with staff)
- Access to Reports at `/reports/`

## Invitations & Onboarding

- User accounts are invite-only via the accounts app.
- IRB Chairs typically do not manage invitations; IRB staff/admin handle creating, resending, and revoking invites.
- If your institution grants chairs this permission, use the admin invitations flow accordingly.

# Daily Tasks

## 1) Manage Meetings

- Create: /meetings/new/
- Agenda: /meetings/agenda/<id>/
  - Add agenda items, link submissions, set outcomes
  - Open Vote page for each agenda item
- Attendance/Quorum: /meetings/attendance/<id>/
  - Mark present/recused; view present count
  - Quorum rule: present (not recused)  $\geq 50\%$  of eligible members (rounded up)
- Minutes: /meetings/minutes/<id>/
  - Edit minutes with a rich-text editor (Quill) during/after meeting
  - Download formatted PDF via the "PDF" button or /meetings/minutes/<id>/pdf/

## 2) Review and Determinations

- Assign reviewers (optional if staff handle this): submissions → Assign Reviewers
- Review checklists: ensure assigned reviewers completed required items
- IRB Dashboard
  - Path: /accounts/irb-dashboard/
  - Tabs: Recent (last 5), Open, Under Review, Determined, All
  - Filters: Study, From/To (created\_at), Per-page; pagination and CSV export
  - Status badges: Ready to determine / Needs checklist / No checklist yet
  - Actions: Study Docs (study-level), Documents (submission), Assign, Determine, Letters
- Determination: submissions → Determine
  - Select decision, choose letter template, generate letter
  - Letters are generated at determination; subject/body render with template variables.
  - PDFs open inline in-browser; viewer available for study/submission documents.

## 3) Reports

- Access from the top navbar or /reports/ landing page
- Upcoming Meetings: filter by date range and Top N; CSV via ?format=csv (add &all=1 to export all)
- Submissions by Status: filter by status; CSV via ?format=csv
- Reviewer Workload: Top N reviewers; CSV via ?format=csv (add &all=1 to export all)

## 4) Communications (Threads)

- Accessible from the top navbar → Communications
- From the IRB Dashboard, each submission has a Comms column with:
  - "Threads" to view submission-linked threads
  - "New" to create a new thread
- Thread list/detail/create pages include a role-aware back button (chairs route back to IRB Dashboard).

## 5) Audit

- Access from the top navbar → Audit (visible to chairs/staff/admin). Use it to search, filter, and export audit events, or view object trails.

## Tips

- Use the mobile-responsive navbar to move between Communications, Audit, Reports, and Meetings quickly.
- CSV exports accept `&all=1` to export all rows (ignoring Top N) where available.
- Coordinate with staff to prepare agendas and materials ahead of meetings.