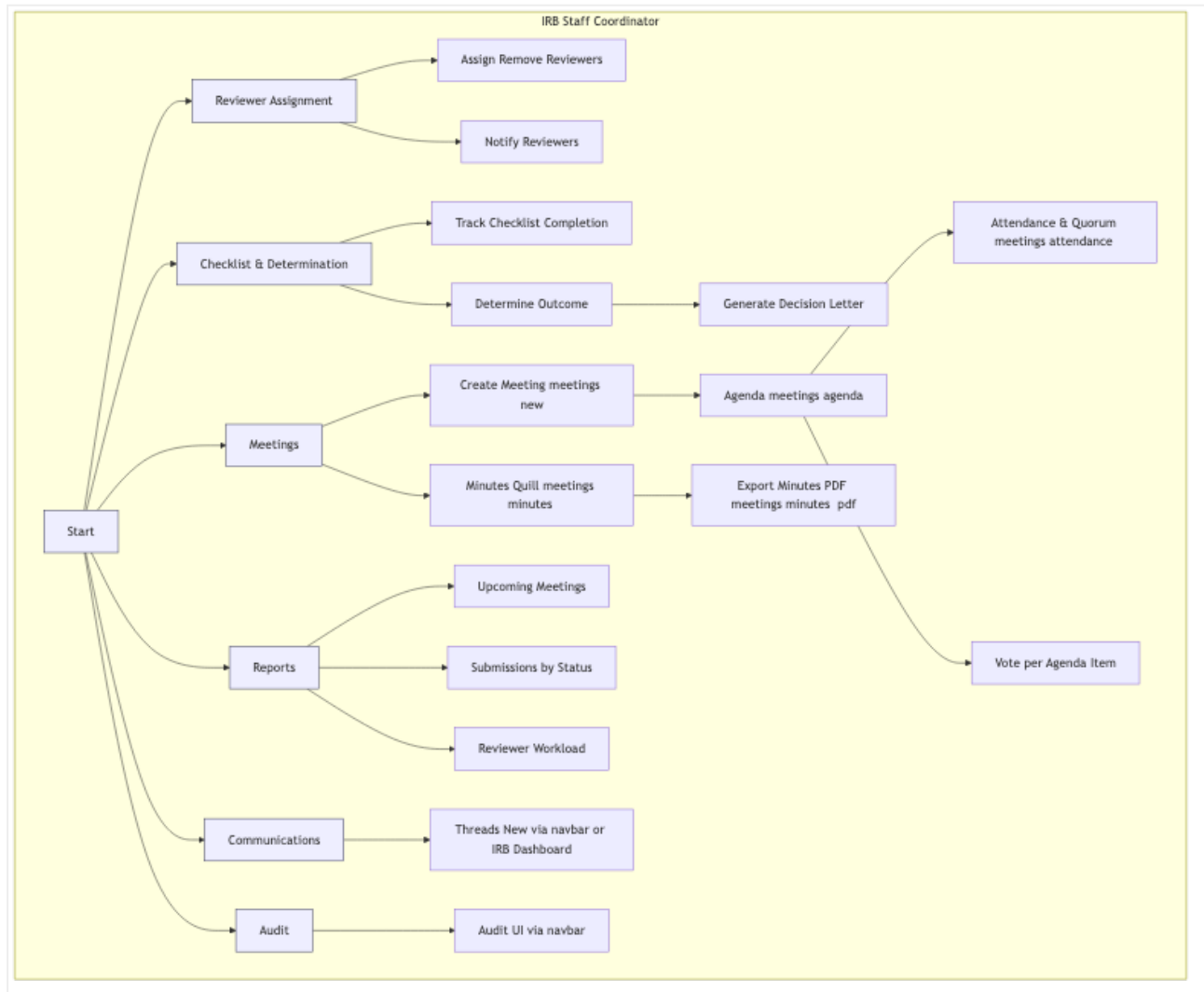


IRB Staff User Manual

This guide covers the core features available to IRB Staff/Coordinators/Analysts.

Mermaid Diagram



Your Role

- Coordinate reviews and meetings
- Manage reviewer assignments and checklists
- Record determinations and generate decision letters
- Prepare agendas, manage attendance/quorum, minutes, and outcomes
- Access reports and exports

Access & Permissions

- Member of group: `irb_staff`
- Full access to Review, Meetings, and Reports

Invitations & Onboarding

- IRB staff manage user invitations via the accounts app.
- Typical actions: create, resend, and revoke invitations.
- Assign appropriate Groups on invite (e.g., `irb_member`, `irb_chair`, `irb_staff`) according to the user's role.

Daily Tasks

1) Reviewer Assignment

- Submissions list → Assign Reviewers (staff/chair only)
- Add/remove reviewers and notify them

2) Checklist & Determination

- Checklist: ensure assigned reviewers complete required items
- Determination: submissions → Determine
 - Pick outcome, choose letter template, generate Decision Letter

3) Meetings

- Create: `/meetings/new/`
- Agenda: `/meetings/agenda/<id>/`
 - Add items, link submissions, set outcomes; open Vote page per item
- Attendance/Quorum: `/meetings/attendance/<id>/`
 - Mark present/recused; view present/recused counts
- Minutes: `/meetings/minutes/<id>/`
 - Record and update minutes with a rich-text editor (Quill)
 - Download formatted PDF via "PDF" button or `/meetings/minutes/<id>/pdf/`

4) Reports

- Access from the top navbar: Reports → or go to `/reports/`
- 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; CSV via `?format=csv (add &all=1 to export all)`

5) 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 badge column: Ready to determine / Needs checklist / No checklist yet
- Actions per submission: Study Docs, Documents (submission), Assign, Determine, Letters

6) Communications (Threads)

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

7) Documents & Viewer

- Study Documents: /documents/study/<study_id>/ aggregates all documents across submissions.
- Submission Documents: /documents/submission/<submission_id>/ lists files and versions.
- Clicking a file name opens the in-app PDF viewer (for PDFs). Non-PDFs show a fallback with a Download button.
- Download is always available for each version.
- Security: uploaded files are validated (extension/size), MIME-sniffed, and antivirus-scanned before archival.

7) Audit

- Access from the top navbar → Audit (visible to IRB staff/chair and admins). Use it to search, filter, and export audit events.

7) UI Updates

- Main navbar is mobile-responsive. Links include: Home, PI Dashboard, IRB Dashboard, Reports, Communications, Audit, Invite (chair/admin), Login/Logout.
- Subnavbar under the main navbar shows only the authenticated user's email and primary role.
- Create Submission (PI flow) is simplified; attachments are added after creation on a separate page.

Tips

- Use breadcrumbs and navbar for quick navigation.
- Keep agendas and outcomes up-to-date to reflect meeting decisions.
- Use CSV exports for sharing summaries with leadership.