COEUS*Lite*

!!! Extension Educator IRB Exemption Use ONLY !!!!
HRPP IRB Protocol submissions should continue to utilize hardcopy process

CES IRB – New Extension Educator Exemption Request

Create New Protocol

NOTE: The CoeusLite Launch Page may be found at: https://coeus.itap.purdue.edu/coeus/userAuthAction.do

1. Log into CoeusLite
2. Click "My IRB Protocols"
3. Click "Create New Protocol" – either link in the top navigation or Create New Protocol button at bottom of IRB Home page.

1: Protocol Details

General Info

NOTE: The data fields with the red asterisks (*) must be completed on the General Info page to initially save a record.

1. Click "General Info" in the left navigation and complete the following fields:
   a. **Protocol Type**: select "Extension Educators Exemption Request"
   b. **Title**: enter the appropriate title of the project
   c. Click "Save" at the bottom of the page

Investigators/Study Personnel

NOTE: Ensure all individuals who are associated with the project are identified on this screen. If persons are not presented when searching, please complete a new Coeus User Access request found at: https://www.purdue.edu/business/coeus/Requests/access.php

1. Click "Investigators/Study Personnel" in the left navigation
2. Click Search/Add Person (complete Coeus User Access Request for all who cannot be found)
3. Complete standard search window and select appropriate individual from results list
4. Complete following fields:
   a. Protocol Role: select Principal Investigator, Co-Investigator, or Study Personnel
   b. Person Role: enter a descriptive role (only used when Protocol Role is Study Personnel)
   c. Affiliation: select appropriate value for the individual to be added
5. Click "Save"
6. Click "Add Investigators/Study Personnel" and repeat all steps for each additional person

Correspondents

NOTE: Primarily used by IRB Admin. Correspondents are additional individuals who will be cc'd on

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documentation.

1. Click "Correspondents" in the left navigation
2. Click Search/Add Person (complete Coeus User Access Request for all who cannot be found)
3. Select Correspondent "Type" from drop down list
4. Enter "Comments" if desired
5. Click "Save"

Funding Source

NOTE: The Funding Source screen designates where funding is established for this project.

1. Click "Funding Source" in the left navigation
2. Click "Add Funding"
3. Select appropriate Funding Source Type
4. Enter corresponding Number/Code
   a. **Sponsor-External Funding**: Enter the appropriate Sponsor Code, or click "Search" and complete the standard Sponsor search
   b. **Departmental Funding**: Enter the appropriate Unit Number, or click "Search" and complete the standard Unit search
   c. **Other –Self Funded**: Enter brief description that specifies the funding source
5. Click "Save"

Examples for Extension:

- **Sponsor-External Funding:** Grants from local community foundations, Federal Sponsors, Agencies, etc.

- **Departmental Funding:** on-campus sources – 310 account, salary savings, or Extension Director funds

- **Other -Self Funded:** gifts, cost recovery activity, education fund

If you have questions about funding, contact Debbie Clampitt, clampitd@purdue.edu

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Notes

NOTE: The Notes section is for working comments, reminders, and information ONLY. Entered Comments cannot be edited once saved and are NOT included as part of an Approved protocol submission

1. Click "Notes" in the left navigation
2. Click "Add Notes" to open a new Comment box
3. Enter note in the open Comment box
4. Click "Save"
5. Repeat for all additional comments

2: Questionnaires

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➢ Complete Extension Educators Exemption Questionnaire

> ✎NOTE: The Protocol Questionnaires are dynamic question sets that will automatically adjust based on the answers provided. By using these forms, Investigators will only need to address those questions that are required.

1. Click "Extension Educators Exemption" in section 2 of the left navigation
2. Complete all questions as they appear.
3. To revise a question that has already been answered, click the "Previous" button at the top of each screen
4. Click the corresponding "More" link for question specific instructions
5. ALL presented questions MUST be answered to Submit
6. A pop up window will indicate when form is complete

3: Attachment Uploads

➢ Upload Protocol Attachments

> ✎NOTE: Specific forms may be required based on aspects of the protocol to be submitted. Please ensure all required attachments are identified, completed, and uploaded prior to submitting to IRB.

1. Complete attachments outside of system and save to desktop
2. Click "Attachments" in the left navigation
3. Click "Add New Document" and complete the following fields:
   a. Document Type: "Extension Educators Exemption Attachments"
   b. Description: Free text field, enter a unique identifier for this attachment
   c. File Name: Click the "Browse" button to complete a standard desktop browse/upload
4. Click "Save"
5. Repeat for all additional documents to be attached

4: Submit

➢ Submit to IRB

> ✎NOTE: Submission for both Academic Approvals and IRB review will now be done electronically through the system. Only complete the "Submit to IRB" function when the Exemption Request is complete and ready for review.

1. Click "Submit to IRB" in the left navigation
2. Click "Submit for Review"
3. Validation Checks will automatically run. "Errors" MUST be corrected prior to submission. "Warnings" may be corrected if desired.
4. Click "Ok" and complete the following fields:
   a. Type: select "New Protocol Application"
   b. Review Type: select "Pending IRB Determination"
   c. Type Qualifier: select "Initial Submission to IRB"
5. Click "Submit"
6. Click "OK" in confirmation window

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PI Approval

NOTE: The PI will be the first electronic Approval required. This allows for a designate to complete the record entry while ensuring the PI is aware and authorizes the submission.

1. If named PI has completed record and has "Submitted to IRB":
2. Click "Return to Protocol"
3. Click "Approval Routing" in the left navigation
4. Click "Approve"
5. Enter Comments and/or Attachments if desired
6. Click "Approve" again to complete PI Approval

If Investigator Delegate completed record and has "Submitted to IRB:

1. Open record from "My IRB Protocols" or Email Notification
2. Click "Protocol Details" and review submission
3. Click "Approval Routing" in the left navigation
4. Click "Approve"
5. Enter Comments and/or Attachments if desired
6. Click "Approve" again to complete PI Approval