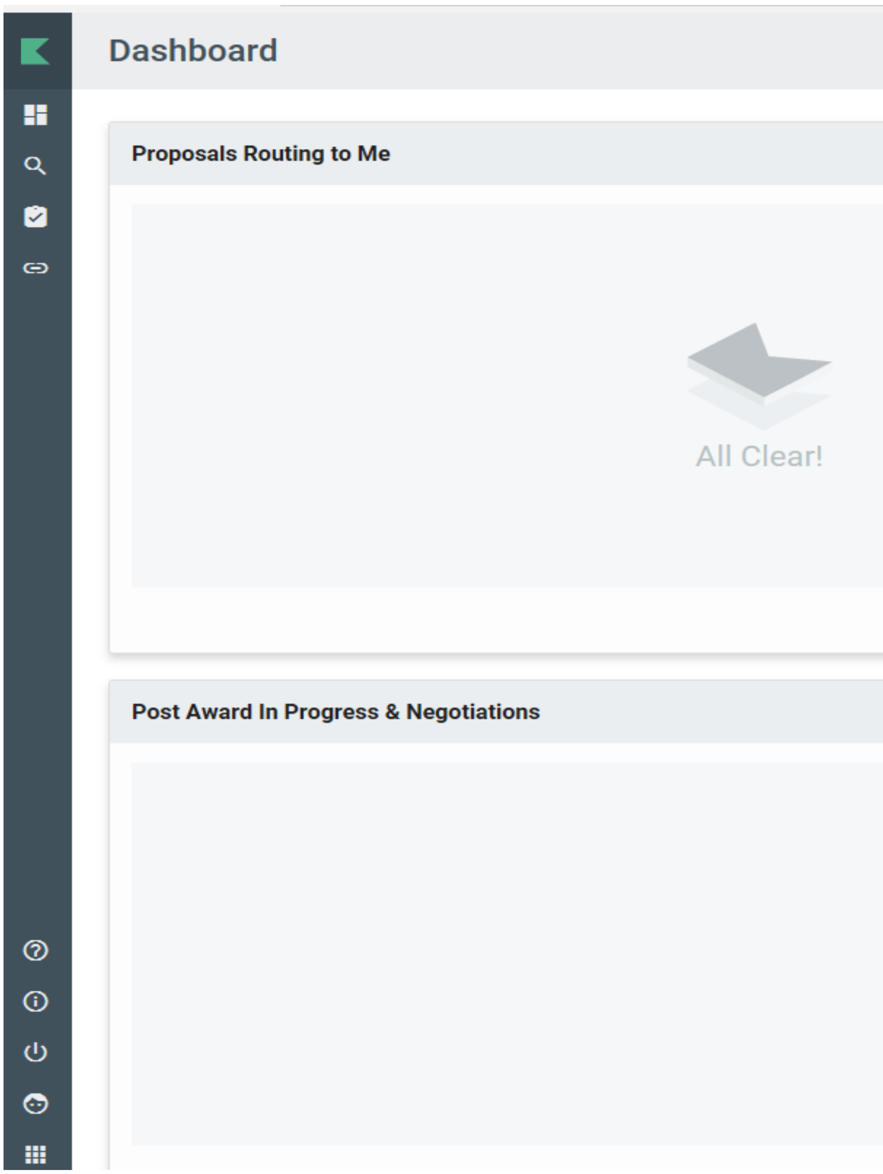
QUICK GUIDE

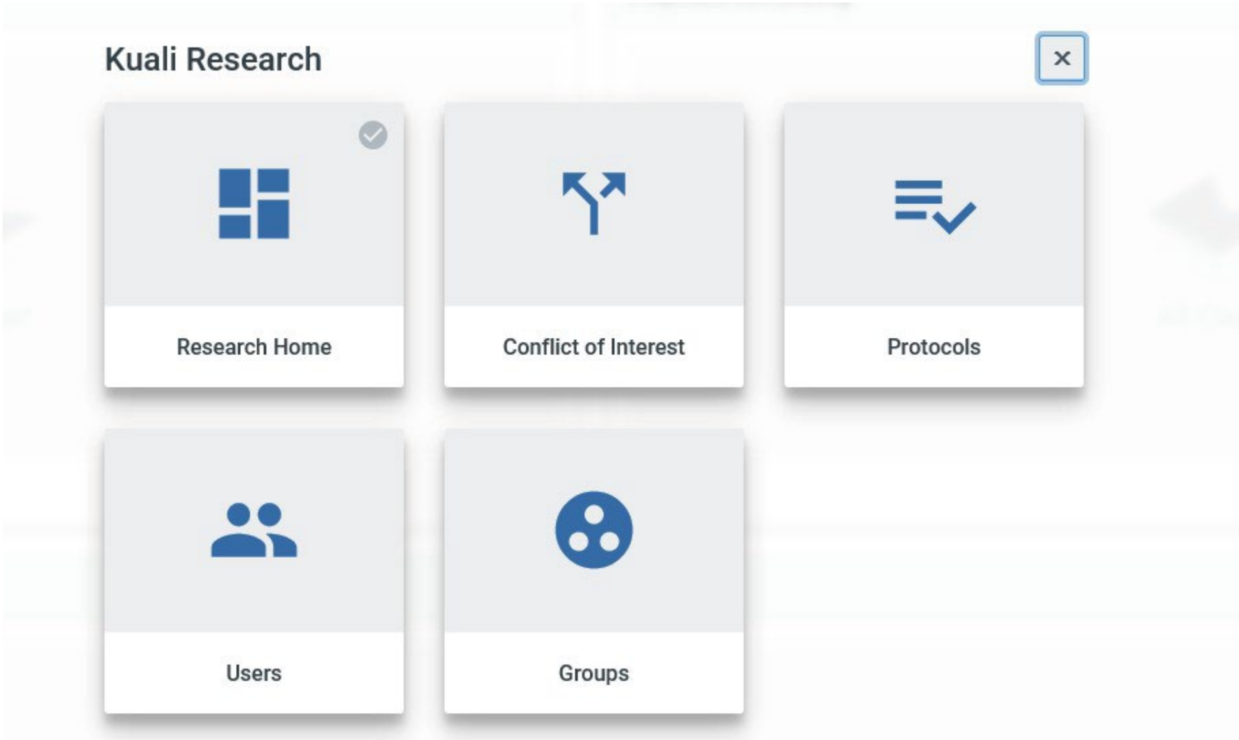
How to create an IBC protocol

1. LOG IN: Go to https://umass.kuali.co/dashboard and log in using your NetID and Password.

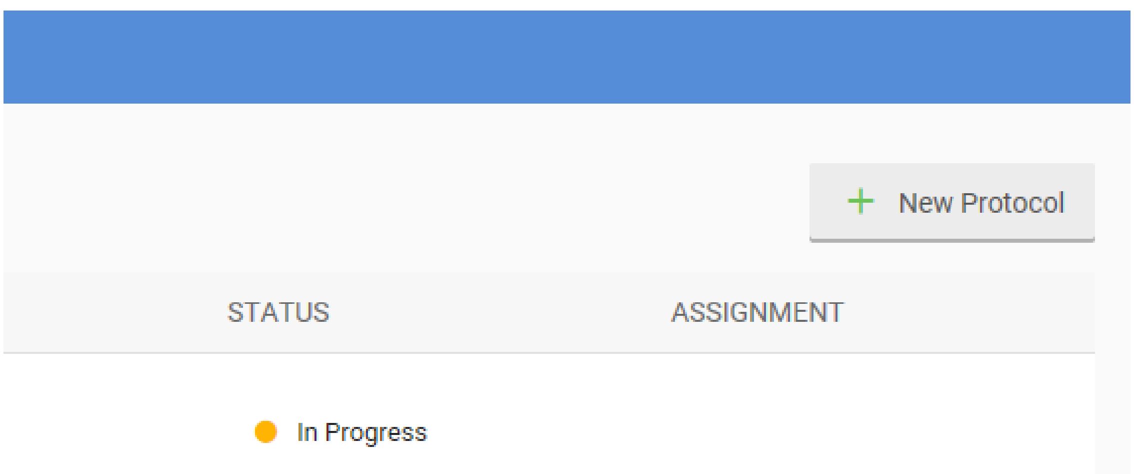
2. Select **Switch Apps** on the lower left margin (the icon has 9 dots).



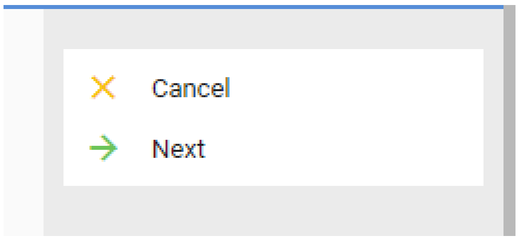
3. Click **Protocols.**



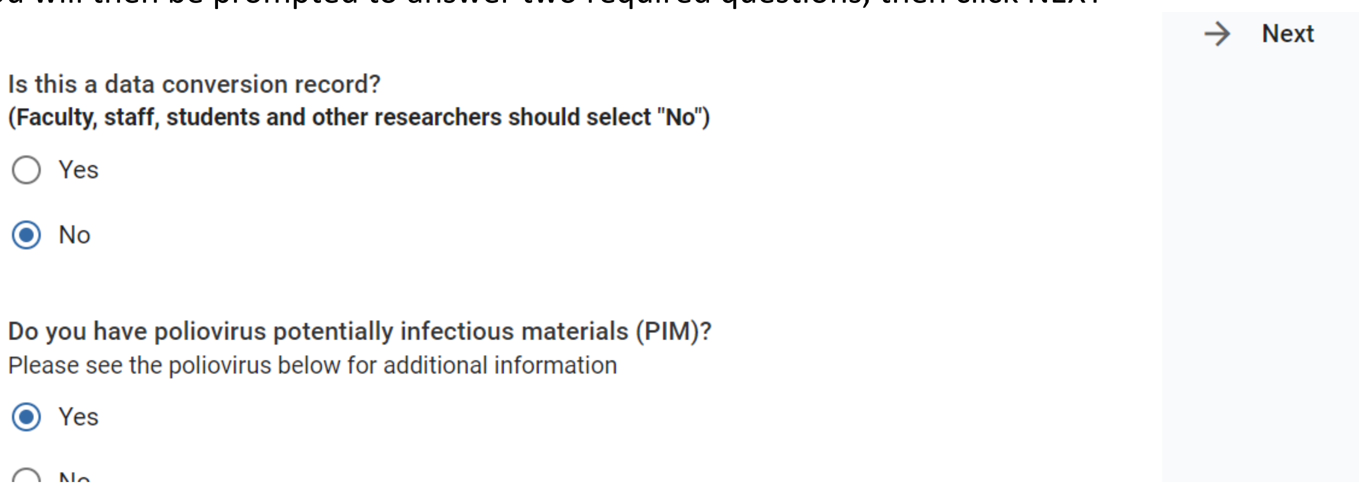
4. Click **+ New Protocol** in the upper right of screen. Then select **IBC**



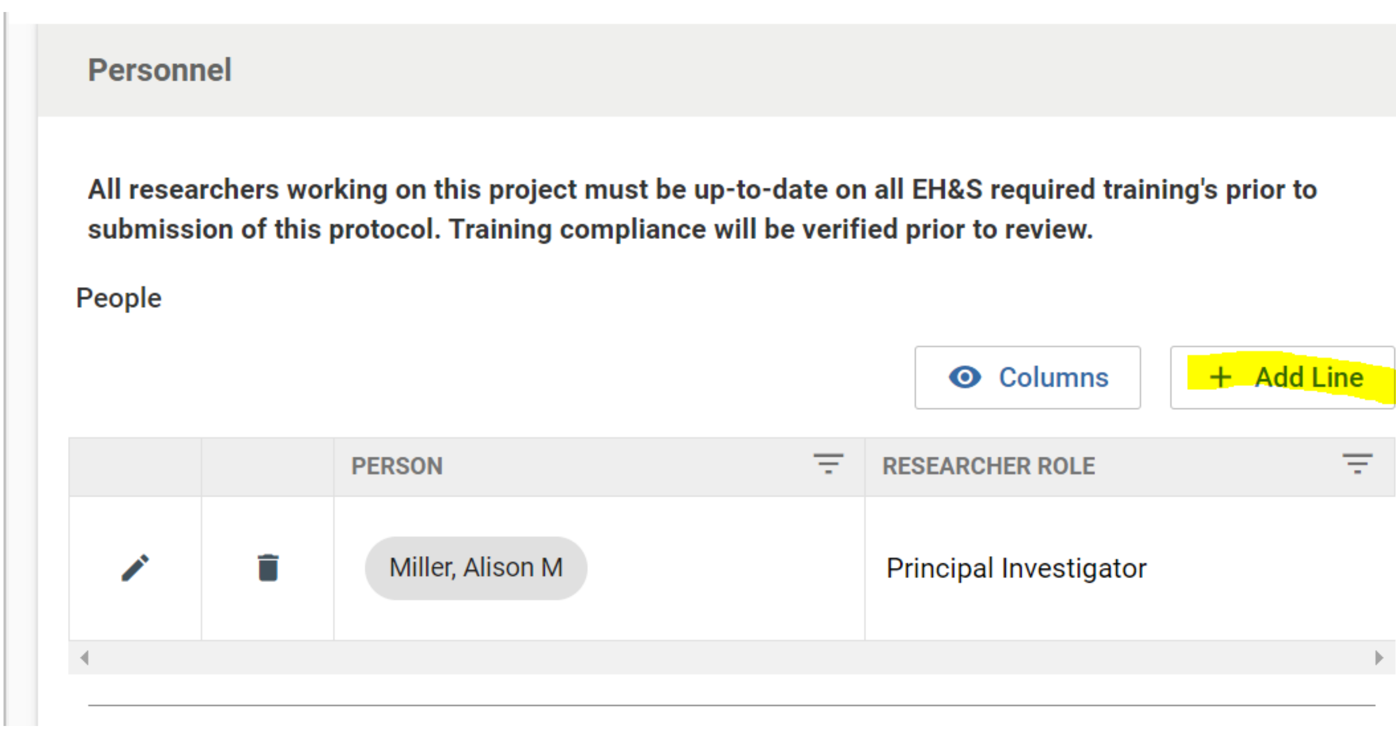
5. Type in your name in the **Principal Investigator** field; your name will populate from a drop-down list. Select your department in the **Lead Unit** field. Type in your protocol title, then click **Next** in the upper right-hand corner.



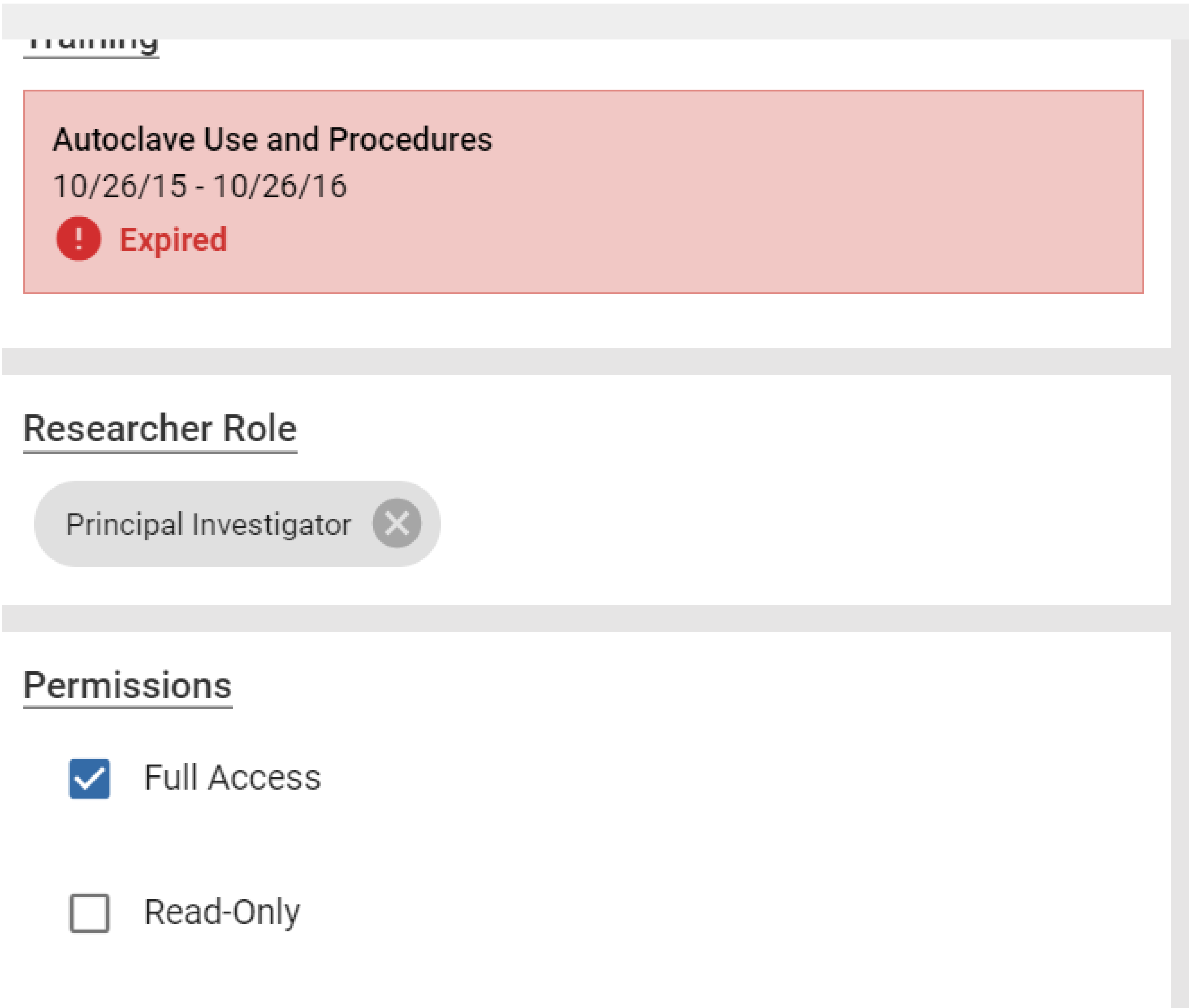
6. You will then be prompted to answer two required questions, then click NEXT



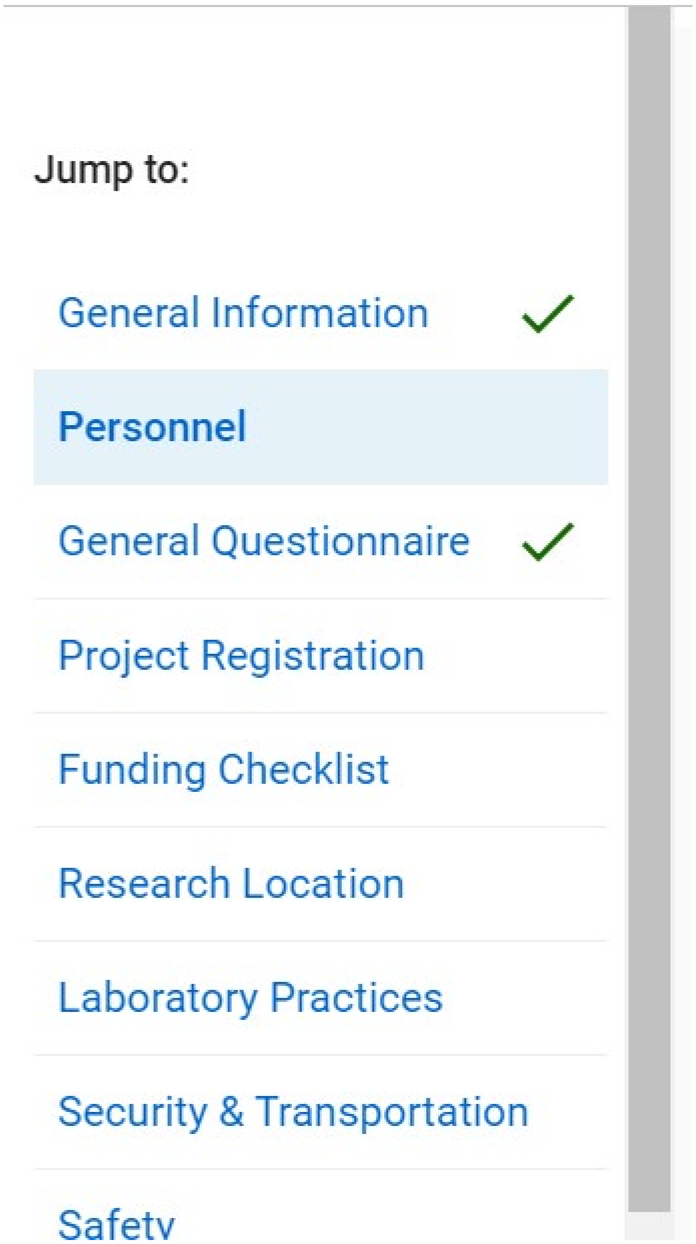
7. You will then need to describe your protocol.



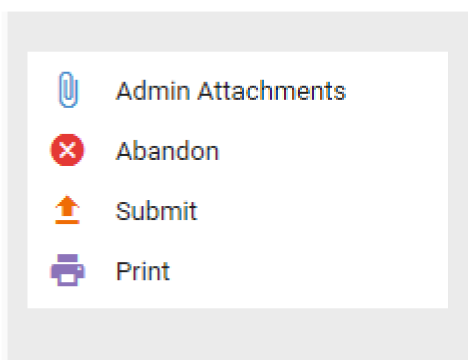
9. You will already be listed in the People section because you are the PI, however, you may need to click the Pencil icon to add information and answer additional questions about yourself. Here is what it looks like when you click the Pencil:



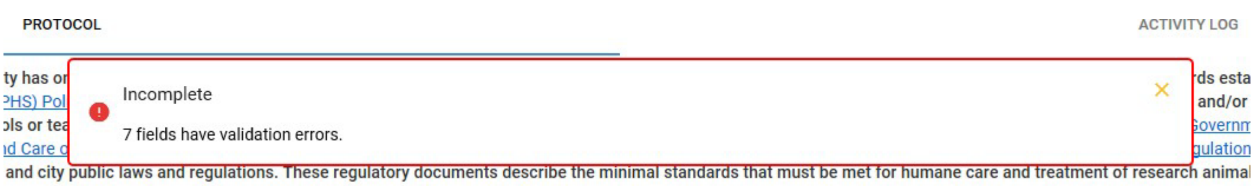
10. The form continues to save as you add information and advances to the next section as you complete sections. On the left side of the screen you will see the different sections of the form and a green check will appear next to sections that are complete:



Once you feel you have completed the protocol, click **Submit** in the upper right-handcorner of the page.



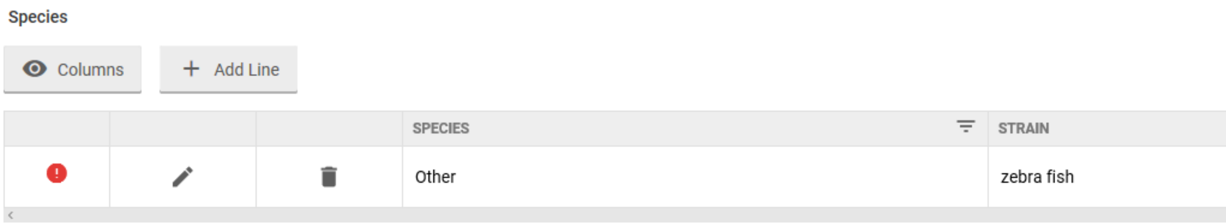
12. If you have not completed areas of the form which are required you will get something that looks similar to this:



Scroll through the form to look for fields that need further completion.

13. For example, you may see that species has a red! next to it. Click the Pencil icon to open the box to see what is missing.

14. Complete the missing information.



15. Click Submit.

16. Once your protocol has been submitted you will receive an email that it was submitted. The top of your form will look similar to this: