How to Copy a Study or Create a Template for Future Use

ePIRATE Training
Principal Investigators (PI) are allowed, in ePIRATE, to copy an existing study for use as a template for future new study submissions. Only the PI can copy his or her existing study. Other study team members are not permitted to copy a study.

In the ePIRATE workspace for his or her study the PI will find a button titled “Copy Study”. This button is located on the left side of the screen under the heading “My Activities”.

Clicking this button will copy the study for immediate use as a template for a new study submission. The PI also has the option to copy a study, store the new template under his/her “My Templates” tab on their ePIRATE Home page and return to use the template as many times as they wish.

PLEASE REMEMBER – You are copying an existing study. The responses and uploaded documents in the copied study/template relate to the existing study. When you are ready to create a new study submission using your copied study/template you must be sure to revise all responses and uploaded documents ensuring that the new study application accurately reflects the content of the new study.

The following slides will provide you with instructions on how to copy a study in ePIRATE.
Welcome to ePIRATE, the electronic Portal for Institutional Research at East Carolina University.

This site enables East Carolina University to manage all aspects of Institutional Review Board (IRB) compliance processes.

Click on Dashboard in the upper left hand corner of this screen to create a study, create and edit your Profile, and perform other actions on existing research studies.

***UPGRADE NOTIFICATION:*** ePIRATE was upgraded on Wednesday, March 17, 2021. The biggest change that existing users will notice is with the look of the IRB application smartform. The “Jump To” menu has moved to the left side of the screen and several other navigation tools on the application pages have been moved. Please review the following 5 minute tutorial explaining this newest upgrade: ePIRATE Upgrade

***9.11.2020***: Existing research studies that are changing their method of paying
Navigate to the appropriate tab for the study you wish to copy; Approved, Certified, Exempt, Archived

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For this tutorial the study that will be copied is currently active and in a state of “Approved”. Find the study you wish to copy or create a template of and click the name to access the main study workspace.
Click "Copy Study"
This activity will COPY this study. You will remain the Principal Investigator for the new Study and it will be placed in your Inbox. All attachments will be copied as well.

New Study Name:

Copy study to My Templates:
- Yes
- No

This will allow this study to be used as a starting point for other studies.

This activity takes time but can save you work! We thank you for your patience.

Click “OK” to create a copy or template of your study.
The response to the question “Copy Study to My Templates” will determine which of the following occurs:

Selecting “No” will create a copy of an existing study allowing you to create and submit a new study immediately

Selecting “Yes” will create a template that can be used for all future study submissions
"Yes" was selected and a template titled "New Template Study" was created. It will appear in both your "IRB Studies" tab and the "Templates" tab.

You can open the template by clicking the name of the study template.
If you would like to use your template to create a new study, select “Copy Study” as you did before but choose “No” to the question instead.
Selecting “No” to this question will result in you creating a study in a state of “Pre Submission”. Here we titled the new copied study “New Template Study to Start Working On”. The study will show up in your inbox and clicking on the study Name will take you to the main study workspace.
The new copied study you have created will behave the same as any new study you create from scratch. The difference is that the smart form will be full of all the information from the study you copied. Care is necessary to make sure you only include information about the new study you wish to submit.