

# 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.

[Dashboard](#)[Home](#)[IRB  
Studies](#)[Committees](#)[Meetings](#)[Contact](#)[Components](#) [Properties](#) [Pe](#)[ePIRATE Training](#)[Institutional Review Board](#)[Common Rule Changes - Effective 01.21.19](#)[General Information](#)[Related Links](#)[Contact Us](#)[Application Version Information](#)[Click on IRB Studies](#)[Find out more about...](#)[ePIRATE Training](#)

## Home

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

» Dashboard Home IRB Studies Issues

Amendments Continuing Reviews Final Report Reportable Events

### Other Submission Types

- ▶ Amendments
- ▶ Continuing Reviews
- ▶ Final Report
- ▶ Reportable Events

## IRB Studies

Welcome to Click Commerce IRB. View a list of IRB studies to see the list of submissions related to your study. Use the 'My Home' link

Navigate to the appropriate tab for the study you wish to copy; Approved, Certified Exempt, Archived

In Progress	Approved	Certified Exempt	Legacy Approved	...		
Filter by <span>?</span> ID <input type="text" value="Enter text to search for"/> <input type="button" value="Q"/> <input type="button" value="+ Add Filter"/> <input type="button" value="x Clear All"/>						
ID	Name	Date Modified	Owner	State	Review Type	PI
MS1_UMCIRB 21-001255	Tutorial Study	5/25/2021 11:15 AM	Gilbird, Neil	Amendment Open	Expedited	UMCIRB
UMCIRB 18-001624	Test Study	3/4/2021 1:44 PM		Pre Submission	Exempt	UMCIRB
UMCIRB 14-001022	Neil study	7/6/2020 12:32 PM		Pre Submission	Exempt	UMCIRB
UMCIRB 18-000600	Copy of Neil's Template	3/2/2018 2:09 PM		Pre Submission		UMCIRB
UMCIRB 17-002837	Whole Group Instruction verses Small Group Instruction	11/29/2017 9:37 PM		Pre Submission		UMCIRB
UMCIRB 17-002835	Whole Group Instruction verses Small Group Instruction	11/29/2017 9:33 PM		Pre Submission	Expedited	UMCIRB
UMCIRB 15-001136	How to Upload Documents in ePIRATE	9/8/2017 4:16 PM		Pre Submission		UMCIRB

Other  
Subm  
Types

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.

roved, and Archived groupings. Use the 'My Home' link to

- ▶ Amendments
- ▶ Continuing Reviews
- ▶ Final Report
- ▶ Reportable Events

In Progress	Approved	Certified Exempt	Legacy Approved	...		
Filter by <span>?</span> ID <input type="text" value="Enter text to search for"/> <input type="button" value="Q"/> <a href="#">+ Add Filter</a> <a href="#">x Clear All</a>						
ID	Name	Date Modified	Owner	Review Type	ExpDate	PI
UMCIRB 21-001255	Tutorial Study	5/24/2021 5:51 PM	Gilbird, Neil	Expedited	5/23/2022	UMCIRB
1 items		page 1 of 1		25 / page		



## Current State

Approved

 View Study

 Printer Version

 View Differences

 New Reportable Event

 New Amendment

 New Continuing Review

 Final Report

## My Activities

 PI Suspend

 Log Public Comment

 Copy Study

 Edit Email List

## Study: Tutorial Study ( UMCIRB 21-001255 )

Description: This study has been created to show various functions within the ePIRATE system.

Principal Investigator: UMCIRB UMCIRB

Study Coordinator:

Expiration Date: 5/23/2022

Letter of Approval: [View](#)

Funding Sources:

**Name Type Parent Organization**

IRB Admin:

Neil Gilbird

There are no items to display

## Snapshot

### Activity

### Description

### ▼ Activity Date

Project Snapshot Generated

5/24/2021 5:48 PM

[View Project Snapshot](#)

### History

### Amendments

### Continuing Reviews

### Final Report

...

### Activity

### Author

### ▼ Activity Date



Revision Completed

UMCIRB, UMCIRB

6/16/2021 11:05 PM

Item was withdrawn using Withdraw activity on amendment.



Copied Study

UMCIRB, UMCIRB

6/16/2021 7:23 PM

New Copy ID is Template000136 Title: New Template Study



Final Report Opened

UMCIRB, UMCIRB

5/24/2021 5:51 PM



Reportable Event Opened

UMCIRB, UMCIRB

5/24/2021 5:51 PM

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:

Provide a name for your new study or template

\* Copy study to My Templates<sup>1</sup>:  
 Yes  No [Clear](#)

<sup>1</sup> 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.*

This option is important and will be covered in the next slide

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



- Administrator
- Ancillary Committees
- Animal Transportation Coordinator
- COI Administrator
- Committee Chair
- Committee Member
- Dept/Div Approvers
- Facilities Manager
- Faculty Advisor/Supervisor Approvers
- IACUC Committee Member
- IACUC Coordinator
- IBC Administrator
- IRB Administrator
- New Registered User
- Office Of Compliance Auditor
- Safety Committee Chair
- Safety Committee Member
- Safety Committee Specialist
- Site Manager
- VP

**Create**

 New Study

**Please note:**

To complete this application more quickly, make sure you have all consents, flyers, questionnaires, protocols, etc. prepared and available for upload prior to creating your study. Utilize Quick Links below to find templates and other tools.

“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

IRB tabs. s where you will enter the date you completed your s conducting human subject research. plates for consents, IRB Conflict of Interest (COI) to upload during the submission process. To e documents so they are ready for upload as you

Inbox	IRB Studies	Templates	Profile
Displays IRB related items you are associated with but do not require any action by the study team at this time.			
Filter by <span>?</span> ID <input type="text" value="Enter text to search for"/> <input type="button" value="Q"/> <input type="button" value="+ Add Filter"/> <input type="button" value="x Clear All"/>			
ID	Name		State
Template000136	New Template Study		Template
UMCIRB 21-001255	Tutorial Study		Approved
UMCIRB 18-001624	Test Study	6/16/2021 7:06 PM	Department Review
UMCIRB 21-001193	SDOH and Asthma Related ED visits	6/16/2021 6:09 PM	Pre Submission
UMCIRB 20-001455	Heart failure exacerbation and/or hypotension after catheter ablation of atrial flutter in patients with severe left ventricular systolic dysfunction	6/16/2021 5:37 PM	Approved
MS1_UMCIRB 20-001455	Heart failure exacerbation and/or hypotension after catheter ablation of atrial flutter in patients with severe left ventricular systolic dysfunction	6/16/2021 5:37 PM	Amendment Open
UMCIRB 21-001253	Comparison of CBCT prescription patterns and Medicaid coverage between main campus and Community Service Learning Centers (CSLCs) of East Carolina University School of Dental Medicine (ECU SoDM)	6/16/2021 5:33 PM	IRB Staff Review
MS2_UMCIRB 20-000278	Surveillance and dental health	6/16/2021 5:09 PM	Amendment Open
MS17_UMCIRB 09-0792	[IMPORTED] The American Thrombosis and Hemostasis Network (ATHN); Patient Authorization Opt In to Participate in	6/16/2021 5:06 PM	Amendment Open

You can open the template by clicking the name of the study template

Navigation menu with tabs: Dashboard, Home, IRB Studies, Issues. Sub-menu items: Amendments, Continuing Reviews, Final Report, Reportable Events.

Help

### Current State

Template

Edit Study

Printer Version

View SmartForm Progress

### My Activities

Log Public Comment

Copy Study

Edit Email List

Send Email to Study Team

(Initial)

## Study: New Template Study ( Template000136 )

Description: This study has been created to show various functions within the ePIRATE system.  
Principal Investigator: UMCIRB UMCIRB Study Coordinator:  
Funding Type: No Funding Review Type:  
Sponsor:

History Attachments Change Log Agree to Participate

This area shows instructions and questions and important notifications regarding this Study.

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.

Search bar with '+ Add Filter' and 'x Clear All'. Filter dropdown: Activity Date. Date: 6/16/2021 7:23 PM

IRB Submissions

# Page for UMCIRB UMCIRB

## My Roles

- IRB Submissions
- Dept/Div Approvers
- Faculty Advisor/Supervisor Approvers
- New Registered User

## Create

## Please note:

To complete this application more quickly, make sure you have all consents, flyers, questionnaires, protocols, etc. prepared and available for upload prior to creating your study. Utilize Quick Links below to find templates and other tools.

## Quick Links

Consent Form Templates, COI

Welcome to your Personal Page, the starting point for all interactions with this site. Note the following:

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.

to speed your submission through the review  
 abs.  
 re you will enter the date you completed your  
 ducting human subject research.  
 for consents, IRB Conflict of Interest (COI)  
 ad during the submission process. To complete  
 they are ready for upload as you move through

Displays all items which require action by the study team. Click on links for more information.

Filter by ?

Name	Date Modified	Type	Owner	State	Last State Change
<a href="#">New Template Study To Start Working On</a>	6/16/2021 7:29 PM	Study		Pre Submission	5/24/2021 5:48 PM
<a href="#">Amendment 1 for IRB Study #UMCIRB 21-001255</a>	6/7/2021 6:15 PM	Amendment	Gilbird, Neil	Pre Submission	5/24/2021 5:49 PM
<a href="#">2022 Review for UMCIRB 21-001255</a>	6/7/2021 6:10 PM	Continuing Review	Gilbird, Neil	Pre Submission	5/24/2021 5:50 PM

### Current State

Pre Submission

Edit Study

Printer Version

View SmartForm Progress

### My Activities

Submit Study

Withdraw

Log Public Comment

Copy Study

Edit Email List

Send Email to Study Team

Request Participant Agreement

## Study: New Template Study To Start Working On ( UMCIRB 21-001416 )

**Description:** This study has been created to show various functions within the ePIRATE system.

**Principal Investigator:** UMCIRB UMCIRB **Study Coordinator:**

**Funding Type:** No Funding **Review Type:**

**Sponsor:**

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.

### History

This area shows instructions and questions and important notifications regarding this Study.

Filter by Activity  + Add Filter x Clear All

Activity	Author	Activity Date
Created Study	UMCIRB, UMCIRB	6/16/2021 7:29 PM