



**Institutional Review Board**

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## UMD Kuali-IRB: Guide to Transitioning IRBNet Projects

Human Research Protection Office

**VERSION 1.3**

*Last Updated 12/08/2025*



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## Purpose

The purpose of this guide is to support investigators in transitioning their active IRBNet projects to the new UMD IRB Submission System, Kuali-IRB.

## Introduction to Kuali-IRB

In January 2026, the UMD IRB will launch a new system to replace IRBNet. The rationale for the transition is that IRBNet does not offer the flexibility UMD investigators require. The new system will be called Kuali-IRB.

## Overview of Kuali-IRB

Kuali Build is a no-code, cloud-based platform specifically designed for higher education institutions to create online forms and automate workflows. The IRB Office has spent the last year building and tailoring the UMD Kuali-IRB system to serve the research community.

Kuali-IRB is a module of Kuali Build, which is already being used by other entities on campus, such as the inTERP system for COI disclosures and ORA Gift Forms.

## Intended Users of Kuali-IRB

Kuali-IRB will be used to draft and submit IRB applications for review. Principal Investigators and research team members will be able to create and amend IRB Forms, such as:

- IRB Protocols
- 118 Letter Requests
- Human Subjects Research Determinations
- Reliance Agreement Requests
- Continuing Reviews
- Reportable Events
- Closure Reports

The IRB Office will use the system to review IRB Form submissions and provide its determination to the researchers. The IRB Office will also document its monthly Full Board meeting on this platform with the IRB Committee.

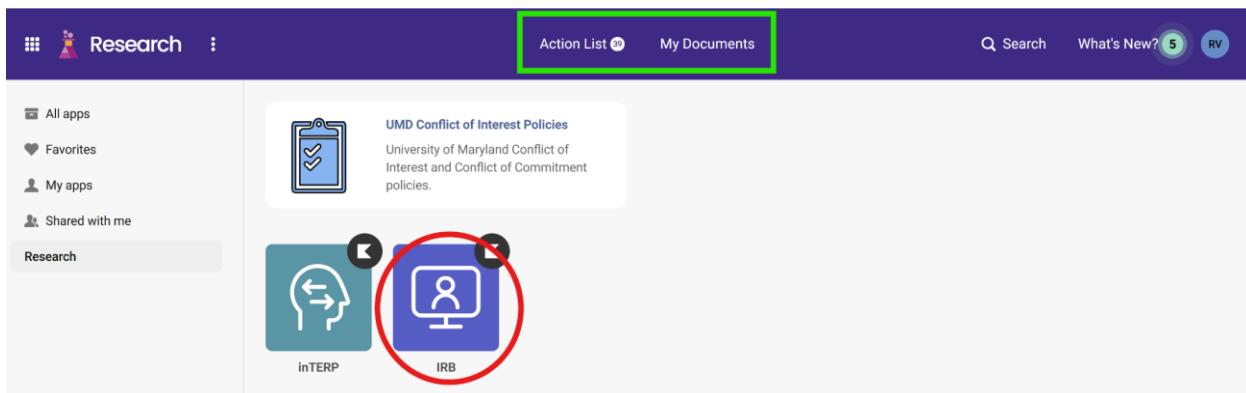
## Navigating the Kuali-IRB Dashboard

### How to Access the Kuali-IRB Platform

Kuali-IRB can be accessed via the following link: <https://go.umd.edu/kuali-irb>



Use your **UMD credentials + Duo Mobile** to log in. Select UMD - College Park, if prompted, NOT UMaryland Baltimore.



When you see this Main Page, click on “IRB” to access the Kuali-IRB Platform (red circle).

Additional items on this page include an **“Action List”** and **“My Documents”** at the top of the page (green rectangle).

The **“Action List”** is similar to “My Reminders” on IRBNet. This list will include any form where your action is required (i.e., Action to address IRB Office Modifications).

**“My Documents”** will list any form that is created in Kuali-IRB, including drafts, withdrawn forms, and “completed” forms. For example, your IRB Application will be saved in this list.

## How Kuali-IRB Functions

### IRB Forms

The snapshot below shows the IRB Forms available on Kuali-IRB.

**IRB Application**

- IRB Protocol (Initial AND Amendment)
- Human Subjects Research Determination
- 118 Letter Request

**Reliance Agreements**

- Request UMD to Serve as the Reviewing IRB
- Request for UMD to Rely on an External IRB
- Request UMD Review of Exempt Collaborations
- Request an Individual Investigator Agreement



### Continuing Review/Closure

- Continuing Review Application
- Closure Report

### Reportable Events

- Reportable Event Application

*Reviews/Checklist, IRB Meetings, and IRB Dashboard are internal forms for IRB Administrator use only.*

## Form Numbering Mechanism

Each IRB Form is identified by a unique application number. For example, the Continuing Review associated with IRB Application #123456 will be CR #022. The Reportable Event Form associated with the IRB Application might be Reportable Event #4.

**IRB Application Number:** 123456

Continuing Review Number: 022 for IRB Application #123456

Reportable Event Number: 004 for IRB Application #123456

Each form also has version numbers - each time a new version of the form is submitted, it will have an updated version number. For example, each time an amendment to a Protocol is submitted, the version will increase. This is similar to how IRBNet Project Numbers were used:

IRBNet Project Number: 123456-78

Kuali-IRB IRB Application Number: IRB Application #123456, Version #78

**IRB Application Number** - this is the main identifier of an application

**Version Number** - this indicates the latest submission of the application

## Linking IRB Forms

*How do the Forms talk to each other?*

Continuing Review/Closure and Reportable Event submissions will be linked to the associated IRB Application by entering the IRB Application number at the beginning of the form.

For example, the image below is of Continuing Review/Closure Report Form #0084, Version #1. The first field in this form is to enter the number of the IRB Protocol I am submitting a Continuing Review/Closure Report for. I entered IRB Application #0292, which populated the IRB Protocol Details.



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Continuing Review/Closure Report Details			
Continuing Review/Closure Number 0084	Continuing Review/Closure Version Number 1	Created By Blackburn, Jennifer	Creation Date August 28, 2025
Associated IRB Protocol			
IRB Application Number * <span style="color: blue;">?</span> 0292			
IRB Protocol Details			
Principal Investigator Blackburn, Jennifer (jdesi@umd.edu)	Protocol Title TEST	Lead Department	1420101 - CC011073 - VPR - VP Research
Principal Investigator Status Staff			

Now, I can submit a Continuing Review or Closure Report for IRB Application #0292.

**!!When you communicate with the IRB Office, the IRB Application number is the most important.**

### Pages

Each IRB Form has multiple pages. Think of the pages as application sections. To toggle between pages, you must scroll up to the top of the page. There is a reminder at the bottom of each page to this effect.

The pages will be different based on each application type. Below is the list of pages that will appear for an IRB Protocol involving primary data collection.



You can navigate between pages by clicking on its row within the list or by using the “Back” and “Next” buttons.

### How to Locate an Approval Letter

After a Form has been approved, all investigators with Read and/or Edit access will be able to access the Approval Letter on Kuali-IRB. Only investigators with Edit access will receive an email notification when the Form is approved.

#### **Here is a Scribe on how to find an Approval Letter for any of the Kuali-IRB Forms:**

[https://scribehow.com/viewer/How\\_to\\_find\\_a\\_Kuali\\_IRB\\_Approval\\_Letter\\_wSUVSItLRcyy0wRhRO1A](https://scribehow.com/viewer/How_to_find_a_Kuali_IRB_Approval_Letter_wSUVSItLRcyy0wRhRO1A)

### Transitioning an IRBNet Project to Kuali-IRB

To submit a project for transition in Kuali-IRB, investigators must complete a Kuali-IRB Application form and upload all active supporting documents (e.g., recruitment materials, consent forms) into the system.

### Projects Eligible for Transition

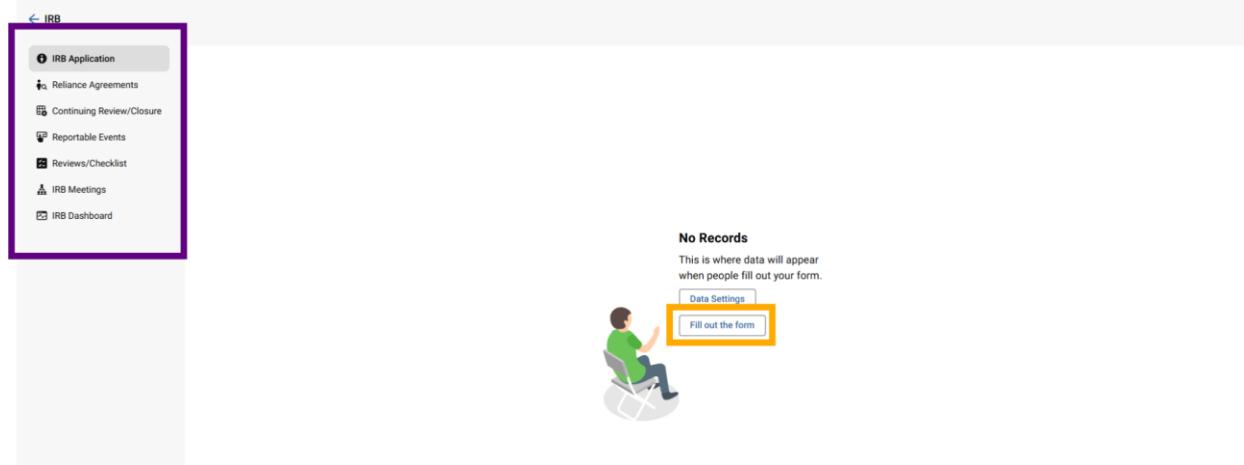
To transition an active IRBNet project to Kuali-IRB, the project must be expect to be active (i.e., enrolling participants and/or analyzing identifiable data) through September 2026.



### How to Submit a Project for Transition

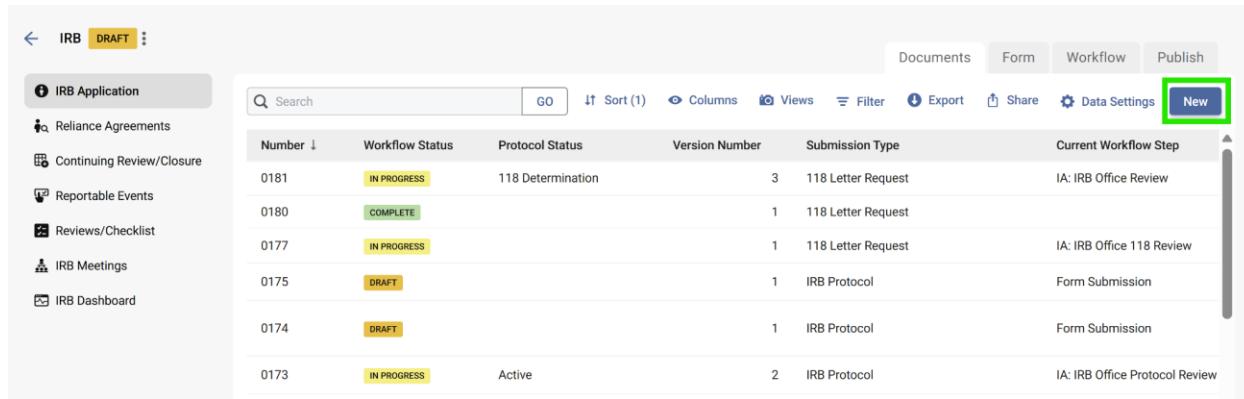
#### Create a New Form

When you click on IRB, you will see the screen below, which is called the **Document List**:



On the left-hand side (purple rectangle), you will see a list of the **IRB Forms**. Each form will open a View with a list of the Draft, In-Progress, and Complete submissions. **If this is your first submission, you will not see anything on this page.** To begin a new form, click “Fill out the form” (orange rectangle). This will open a new draft of the form.

**Once you have drafted your first form**, you will see a view similar to the one below. If you want to create a new form, the button to create a new form is in the top right-hand corner (green rectangle) “New”.



Number	Workflow Status	Protocol Status	Version Number	Submission Type	Current Workflow Step
0181	IN PROGRESS	118 Determination	3	118 Letter Request	IA: IRB Office Review
0180	COMPLETE		1	118 Letter Request	
0177	IN PROGRESS		1	118 Letter Request	IA: IRB Office 118 Review
0175	DRAFT		1	IRB Protocol	Form Submission
0174	DRAFT		1	IRB Protocol	Form Submission
0173	IN PROGRESS	Active	2	IRB Protocol	IA: IRB Office Protocol Review

#### Share Edit/Read Access with Investigators

##### Edit Access

The Kuali-IRB platform allows for collaborative editing of the IRB Forms. Only users with ‘Edit Access’ to the IRB Form will be able to edit the form.



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Each IRB Form has a field where researchers can share 'Edit Access' to the form. The field will look like this in the 'Key Personnel' Page:

3. UMD Personnel with EDIT Access \*

Of all personnel listed above, specify in this question who will require EDIT access to the project, including the Principal Investigator AND Faculty Advisor (if applicable).

Everyone included in this list will be able to EDIT this form, will receive email notifications regarding requested modifications and approval and be able to submit future amendments.

**NOTE: Please limit this list to 3 editors to prevent investigators from overriding each other's work.**

Start typing each UMD Personnel's name here

Only those included in this field will be able to edit the form while it is a Draft and when the IRB Form is returned for researcher revisions.

When working on a draft, the creator of the form can complete this field and click 'Save'. This will share edit access with the individuals listed in this field. They will be able to access and edit this draft by visiting their "Document List" on Kuali.

**!! It is crucial that only one person edits the IRB Form at any given time to prevent the risk of overriding each other's responses. Please coordinate with those who have edit access to manage and limit editing to one individual at a time.**

### Read-Only Access

All investigators listed on the IRB Protocol will have read-only access to the form. The field in the IRB Protocol looks like this in the 'Key Personnel' Page:

2. ALL UMD Investigators/Personnel

List all UMD investigators in the table below, **INCLUDING** the Principal Investigator and Faculty Advisor (if applicable).

Everyone included in this list will have READ-ONLY access to the project (except for the investigators also listed in Item #3 below, who will have READ + EDIT access).

2a. Person * <span>?</span> Blackburn, Jennifer (jdesi@umd.edu)	2b. Project Role * <span>?</span> Principal Investigator	2c. Home Department * 1420101 - CC011073 - VPR - VP Research	2d. Engaged in Human Subjects Research? * <span>?</span> Yes	2e. CITI Training (File Upload) * <span>?</span> <b>TEST.docx (13.3 kB)</b>
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Everyone listed in this table will have read-only access to each version of the IRB Protocol. They will be able to view the form by visiting their "Document List" on Kuali while it is in a Draft, In-Progress, and Complete workflow status.

This list can be updated via an Amendment at any time.

### Submit an IRB Application as a Transition

To indicate that the IRB Application form is for an IRBNet transition to Kuali-IRB, the following fields must be completed with the selections below:

1. Page: Submission Details  
Question: Submission Type  
Response: IRB Protocol



### 2. Page: Project Basics

Question: 1. Is this project being transitioned from IRBNet?

Response: Yes, this is a transition from IRBNet\*

\* Selecting this option will open up two questions to document the IRBNet Number of the project you are transitioning and to describe the current status of your project.

1a. Please enter the IRBNet Number

1b. Describe the current status of the project.

For Question 1b, be sure to describe the current status of the project. If the project was approved for primary data collection, but the project currently only involves data analysis, please state as such. For Question 3, "How will data be collected for this study?", be sure to select the form of data collection that was approved by the IRB. For example, for the case described in this paragraph, you should select Primary Data Collection only.

Here's a link to a Scribe that clearly outlines all of the information discussed above in a visual format: [Scribe - Transition an IRBNet Project to Kuali-IRB](#)

### Active Supporting Documents

Upload all active supporting documents from IRBNet (e.g., recruitment materials, consent forms, survey/interview questions) that are in use and/or will be in use in the future.

**!!Be sure to add the Kuali-IRB number to any documents that refer to the IRBNet ID, including the consent form.** You may either:

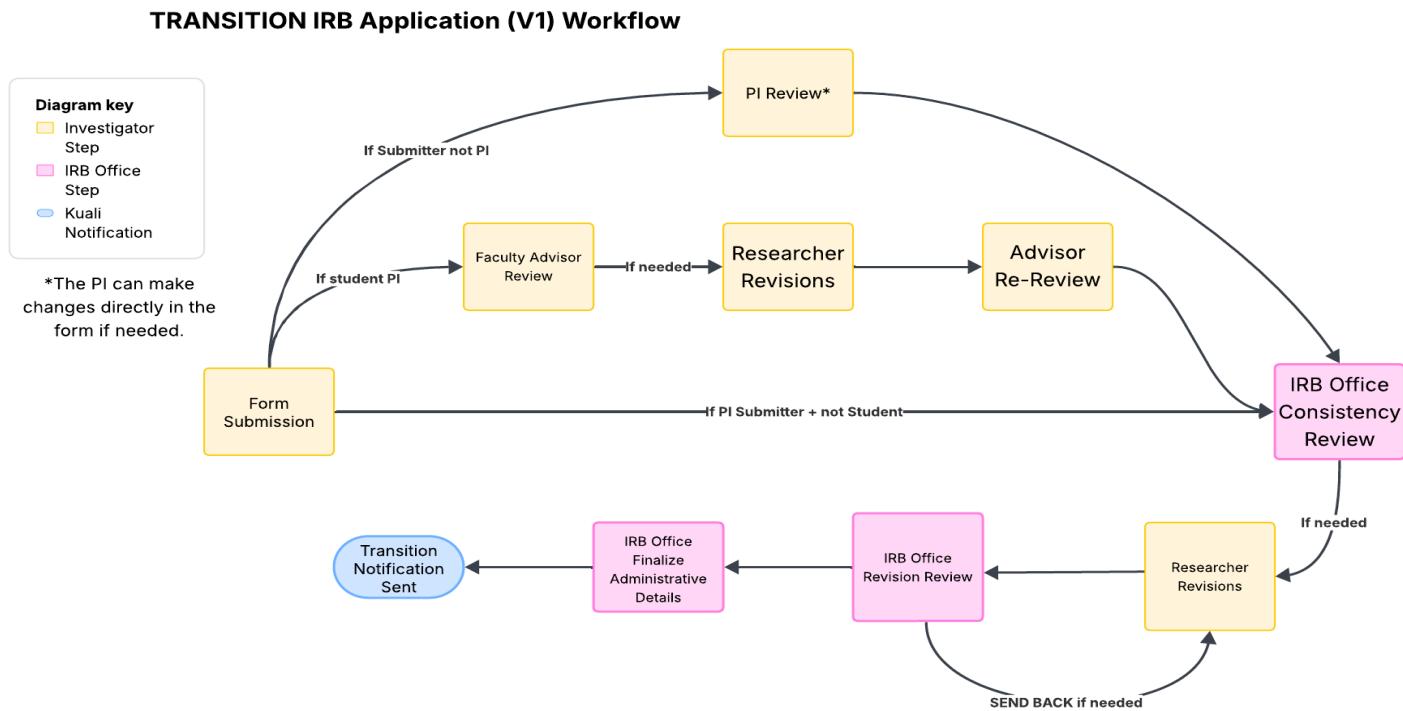
1. Add the Kuali-IRB number **in addition to** the IRBNet ID if it is useful for your team's internal tracking, OR
2. Remove the IRBNet ID number and replace it with the Kuali-IRB number. See the [KIRB Consent Form Template](#) for reference.

### Submit the Form

Click "Submit" in the top-right corner to submit this form to the IRB Office for review. Please note: You will not be able to edit this form unless a reviewer sends the form back to you with requested edits. Please ensure that this submission is accurate and complete before submitting.

## Transition Review Process

Once the IRB Application has been submitted for IRB Review, the IRB Office will be able to distinguish an IRB Initial Application from a Transition via the multiple-choice question regarding the transition status. For projects that are being transitioned from IRBNet to Kuali-IRB, they will follow the review process below:



Transition Review Process Visual Aid

## Research Team Review

Based on the Submitter of the Application, the Application will be reviewed by the Principal Investigator (PI) and/or the Faculty Advisor before the IRB Application is submitted to the IRB Office for review.

### Principal Investigator Review

If the submitter is not the Principal Investigator (PI) of the project, the PI will receive an email from Kuali requesting a review of the application. The PI can make direct edits to the application from the Action List. Once they are satisfied with the application, they should click 'Approve' to move forward.

### Faculty Advisor Review

If the Principal Investigator (PI) is an undergraduate or graduate student, the Faculty Advisor listed on the application will also receive an email from Kuali to review the



application. This email will be sent at the same time as the notification to the PI if the submitter of the project is not the PI.

The Faculty Advisor will have access to the IRB application but will not be able to make direct edits to it. If the Faculty Advisor has any modifications to suggest, they will note them in a table within the Liaison/Advisor Review Checklist section. If modifications are needed, the application will be returned to the investigators with edit access for revisions. Once the modifications are addressed, the application will be re-reviewed by the Advisor. If no modifications are necessary or when the Advisor is satisfied with the modifications, the application will move forward.

## IRB Office Consistency Review

Once the required reviews by the PI and/or Faculty Advisor have been completed, the IRB Office will receive notification to begin its review. The IRB Office will review each project for consistency. If any modifications are needed, the IRB Office will send the application to the investigators with edit access for revisions.

## Respond to Modifications

An email notification will be sent to the investigators with edit access that the submission requires modifications. The investigators with edit access can click on the "View Task" button in the email to open the submission and begin editing. This task will also appear in their Kuali "Action List". Once the modifications are complete, click "Mark Complete" in the upper-right-hand corner. You will have the option to leave a comment for the reviewer there.

## IRB Office Re-review

Once the IRB Analyst has reviewed and confirmed the requested modifications, an Acknowledgement letter will be processed to indicate that the project has been successfully transitioned to Kuali-IRB. All users listed as needing Edit access to the Kuali-IRB application will receive the Acknowledgement letter.

## Post-Acknowledgement Next Steps

Once the IRB Application has been acknowledged, the IRB Office will **close** the IRBNet Project. Moving forward, all related IRB transactions will occur in Kuali.

[Kuali-IRB: Guide to Submitting an Amendment](#)

[Kuali-IRB: Guide to Submitting a Reportable Event](#)

[Kuali-IRB: Guide to a Reliance Agreement Request](#)

*A guide on how to submit a Continuing Review is forthcoming. Contact [irb@umd.edu](mailto:irb@umd.edu) with questions.*