

Kuali Research

IRB Protocols Training Activities

Bowie State University
Summer 2026

Activity 1 – Logging In

Step No.	Instructions
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- | | |
|---|---|
| 1 | Navigate to: https://bowiestate-sbx.kuali.co/ (This link is for training and practice purposes only) |
|---|---|

Log in via SSO

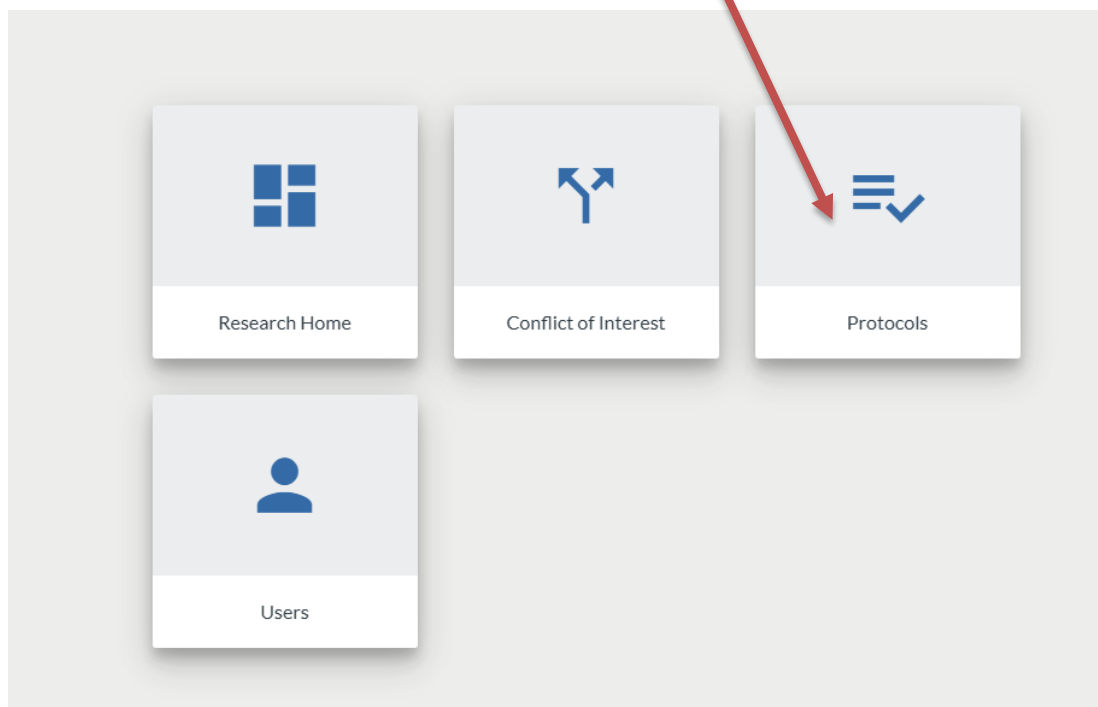
- | | |
|---|--|
| 2 | <i>Note: If you cannot access the Kuali system, please contact kualiadmin@bowiestate.edu with your issue.</i> |
|---|--|
-

Activity 2 – Searching for Protocols (to be completed after creating at least one protocol in Kuali)


Step No. Instructions

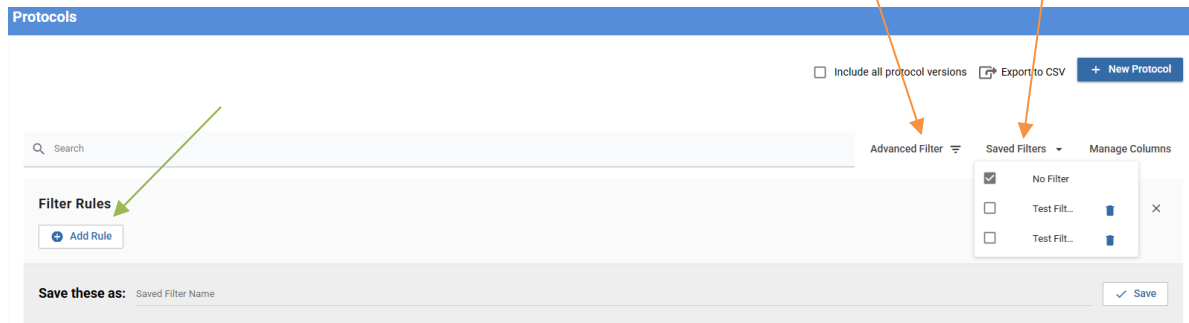
From the **Home** screen:

- Click [Protocols](#).



1

- On the [Manage Protocols](#) page, click the [Advanced Filter](#)  button at the top of the screen.
- Select [No Filter](#) in the [Saved Filters](#) Dropdown



Click **Add Rule** and enter the following details

- 2
- **First Dropdown: Status**
 - **Second Dropdown: is among**
 - **Third Dropdown: Submitted for Review Resubmitted and Approved**
 - Click in the grey area

Click in the **Save these as** field and enter a name for your filter

- 3
- Press **Save**

- 4
- Click the **Saved Filters** dropdown and confirm that your filter is saved and review the returned search results.

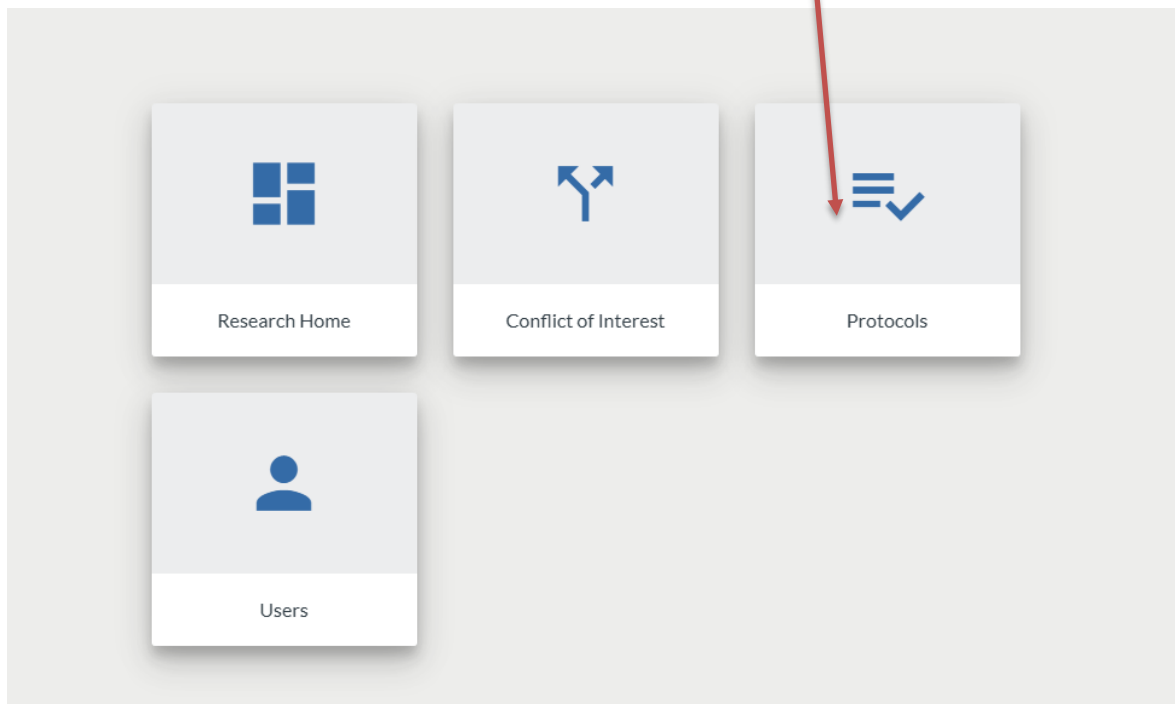
Activity 3 – Create a New Protocol

Step No. Instructions

From the **Home** screen:

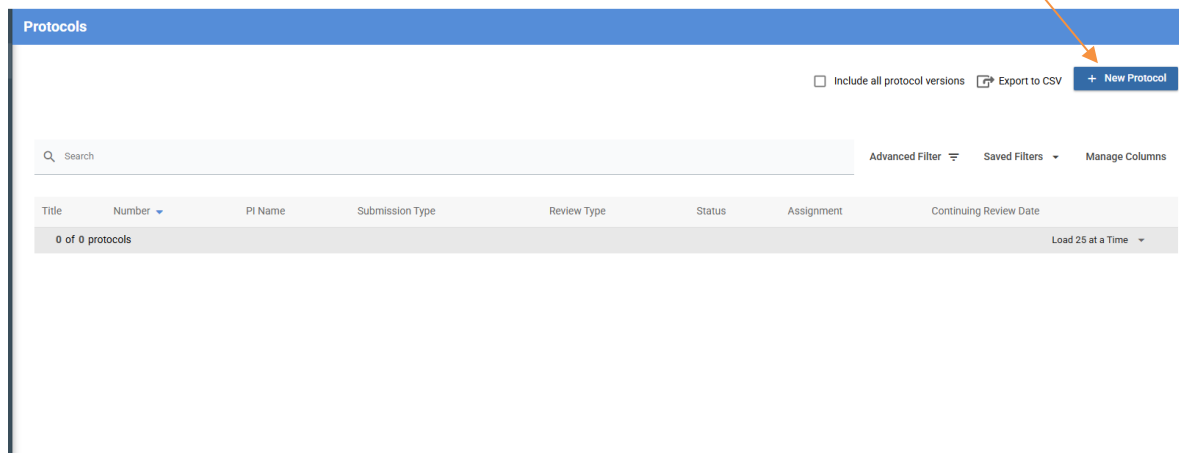
Click [Protocols](#)

1



From the **Manage Protocols** screen:

- Click the [+ New Protocol](#) button and select **IRB**



Kuali Research **Protocol** Document will open. Complete the information as indicated below:

- 2
- **Principal Investigator:** Yourself
 - **Lead Unit:** Leave as the Unit that Auto populates (Enter your Unit manually if it does not auto populate)
 - **Title:** My Important Project
 - Click the **Next** button in the upper right hand corner of the screen

Complete the fields with the following data

- 3
- **Anticipated Start Date:** 8/1/2026
 - **Anticipated End Date:** 7/30/2027
 - **Will another institution's IRB review this study?** No
 - **Will this study be funded by an external grant or contract?** No
 - **Will this study be led by a graduate student?** No

Press the **Next** button.

Note: When you have time create a form with each of the Submission Types available and familiarize yourself with the form questions.

- 4 The full protocol will open. Complete the fields with data that is appropriate to your protocol and press the **Submit** button. The following instructions give additional guidance for a few key areas of the protocol, but most of the form should be self explanatory.

On the **Personnel Section**, click the edit button in front of your name to specify your role and provide personal attachments including the required **CITI Training Certificate**.

6


Personnel

*
Bowie State University Personnel

Instructions to add or update person.

- Click **+ Add Info** below to add your first person.
- Click **+ Add Line** to insert additional person.
- Select the **Edit Pencil** next to a person to edit or update.

Download All Columns + Add Line

	PERSON	RESEARCHER ROLE
	Simpkins, Nerissa L.	Principal Investigator/Faculty Advisor

• Non-Bowie State University Personnel

Does this protocol include any researchers from another institution?

Yes

No

To add another person to the protocol, click the **+ Add Line** button. In the **“Add”** window, search for and select the individual’s name in the **“Person”** field. Then assign the appropriate **role** and **permissions**.

To upload their CITI Certificate, click the **Add Info** button and attach the document. Once all information is completed, click **“Done”** to return to the main protocol page.

Add

Person
shalin
Singh, Shalini S
ssingh@bowiestate.edu

Email Address
Click Here to Add Text

Phone
Click Here to Add Text

Researcher Role
+ Add

Contact Roles
+ Add

Permissions

Cancel Done

ate

Researcher Role

+ Add

Contact Roles

+ Add

Permissions

The following attachments are required for any researcher on the protocol:

- CITI Training Certificates
- Other Certifications (as required)

Personnel Attachments

Download All Columns + Add Line

	ATTACHMENT	ATTACHMENT TYPE
+ Add Info		

Download All

× Cancel Done

is, such as individuals with impaired decision-making ability or possibly subject to coercion or undue influence?

When you get to the **Attachments** section, click the **+ Add Info** button to add an attachment. Then drag and drop / select and bring an attachment onto the Supporting Document column in the line you just added.

Name the document and select the attachment type.

To add another attachment, click the **+ Add Line** button to open another line.

Notes: You can add multiple lines at once to make dragging several attachments in sequence a simpler process.

Once you've completed the form click the **Submit** button and clear any errors that are displayed through your protocol form. (They will be highlighted in red) Press the **Submit** button again and confirm the Protocol screen goes into **Read Only** mode and the status updates to **Submitted for Review**.

7

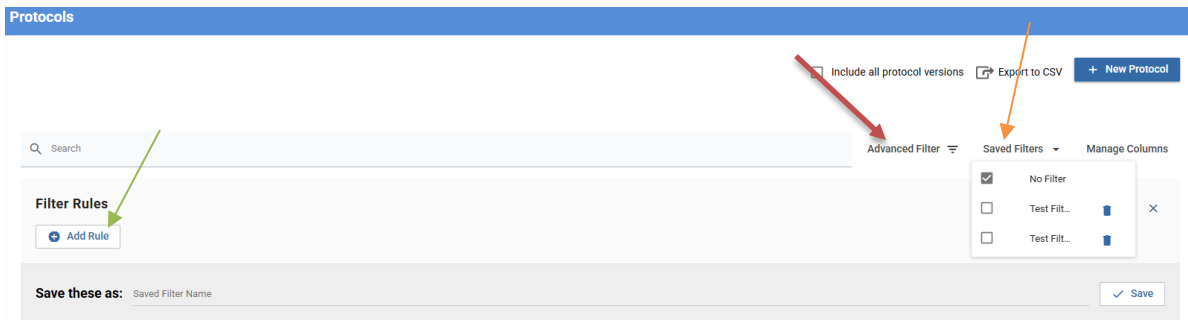
Activity 4 – Complete Requested Changes as the Researcher

Step No. Instructions

As the PI on the protocol created in Activity 3

From the **Manage Protocols** screen:

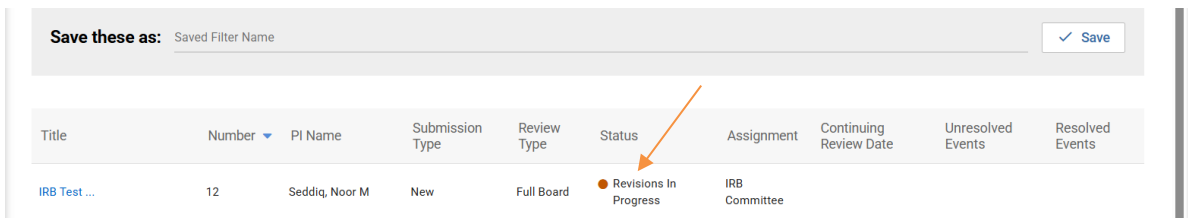
1



- Click **Saved Filters** and select **No Filter**
- Click **Advanced Filter** at the top of the screen.
- Click the **+Add Rule** and enter the following details
 - **First Dropdown: PI Name**
 - **Second Dropdown: contains**
 - **Third Dropdown: <your initials>**
 - Click in the gray area

- Confirm that your Protocol displays **Revisions In Progress** in the status column.

2



- Click on the Title of your protocol.

Confirm that the comment made when the protocol was returned displays at the top of the screen under the heading **Feedback**.

The screenshot shows the Kuali Research interface for managing protocols. At the top, there is a navigation bar with a 'Back' button and the title 'Manage Protocols → IRB: #12 IRB Test ...'. Below this, there are tabs for 'Protocol', 'Activity Log', and 'Permissions'. On the left side, there is a 'Jump to:' sidebar with a list of menu items: 'General Information', 'General Questionnaire', 'Personnel', 'Assessment Checklist', 'Exemption Categories', 'Protocol Review Type', 'Protocol Details', 'Attachments', 'PI Certification', 'Administrative Details', and 'Determinations'. The 'Protocol Details' item is highlighted with a red circle containing the number '1', and an orange arrow points from this circle to the 'Protocol Details' section of the main content area. The main content area is titled 'Protocol Information' and contains several fields: 'Submission Type' (New), 'Review Type' (Full Board), 'Status' (Revisions In Progress), and 'Submission Number' (1). Below this, there is a yellow 'Feedback' section with a red header. This section contains the following information: 'Revision Due Date' (May 25, 2026), 'Revision Required Comment' (Revisions needed by May 25), and 'Revisions needed by May 25'. An orange arrow points from the 'Revision Required Comment' field to the text 'Revisions needed by May 25'.

4 Check the navigation sidebar on the left and confirm that all of your Action Items are accounted for.

Scroll down to the **Protocol Details** Section and click on the first **Action Item** button that displays.

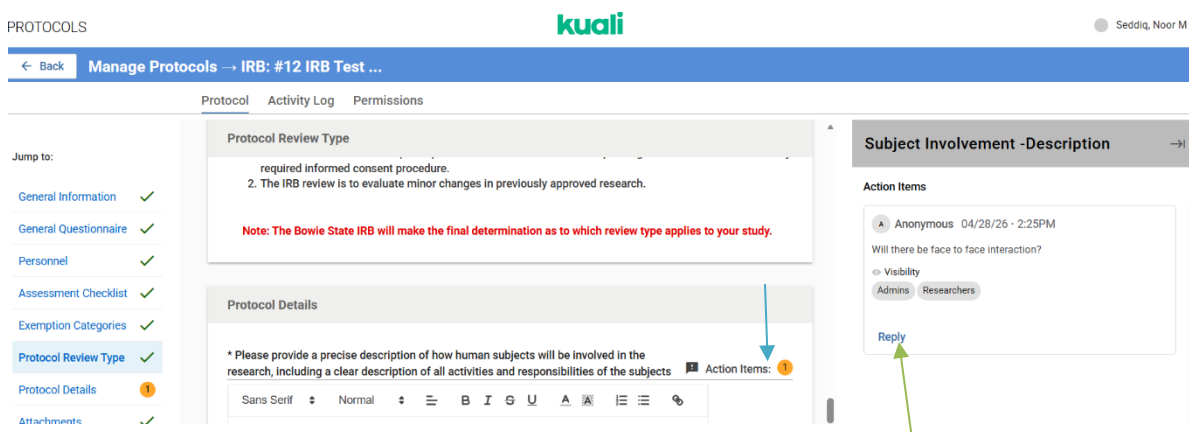
Confirm that the Action Item displays.

Click on the answer to the question and change your answer.

Click the **Reply** button on the right-hand to reply to the Action Item and type in a response, then press **Post** at the bottom of the reply to post your response.

Repeat these steps for all fields with an Action Item.

5



6

Change the answers in one of the fields without an Action Item.

7

Scroll through your Protocol and review the changes you've made to the fields. Make any additional changes that are needed.

Press the **Resubmit** button on the right-hand action bar.

Activity 5 – Submitting an Amendment

Step No. Instructions

- 1 From the **Manage Protocols** screen, search for and open the previous protocol that was just approved

Click the **Amend** button in the upper right-hand corner of the screen.

- 2

- 3 Answer the **Study Enrollment Status** and **Modification Type** questions. Then answer all follow up questions

- 4 Scroll down and click **+Add Line** in the Personnel section and complete the following fields
 - **Person:** **Melissa Duchene-Kelly**
 - **Home Unit:** **Psychology**
 - **Researcher Role:** **Co-Investigator**
 - **Permissions:** **Read Only**
 - Click **+Add Line** in the Personnel Attachments list and add a **Training Certificate** attachment.

Scroll to the bottom of the dialog and press **Done**

5 Scroll down to the **Protocol Details** section and change your answer to the question **Describe the risk to the subjects? Could the research be done without using humans?**

6 Press the **Submit** button

Click on **Activity Log** and confirm that there are entries for the Version Amendment and Submit actions.

7

Manage Protocols → IRB: #12 IRB Test ...

Protocol Reportable Events **Activity Log** Ancillary Review Permissions

IRB: #12 IRB Test ... Compare Versions

Selected Version:
5 | Renewed | Approved

Protocol Information Show Less ^

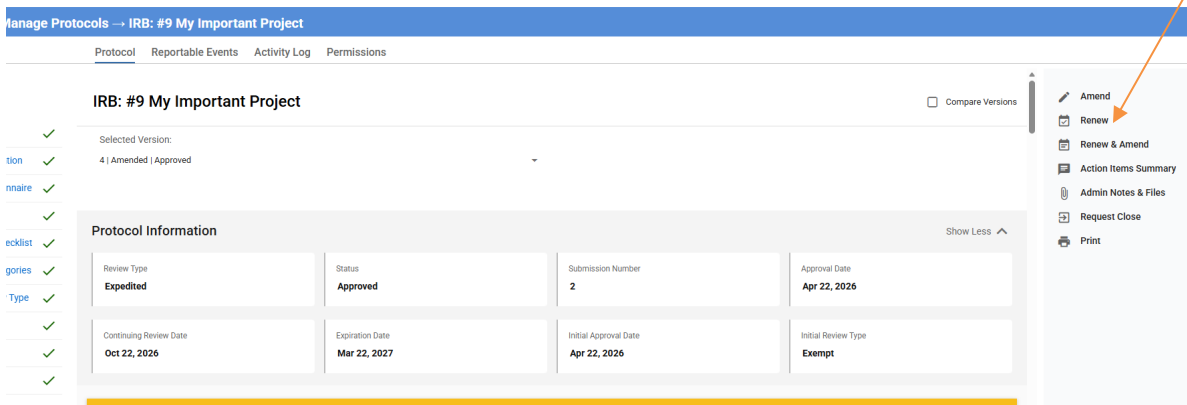
Review Type	Status	Submission Number	Approval Date
Expedited	Approved	3	Apr 28, 2026

Activity 6 – Submitting a Renewal

Step No. Instructions

- 1 From the **Manage Protocols**, search for and open the protocol (Amendment) that was just approved

Click the **Renew** button in the upper right-hand corner of the screen.

- 2 

The screenshot displays the 'Manage Protocols' interface for 'IRB: #9 My Important Project'. The top navigation bar includes 'Protocol', 'Reportable Events', 'Activity Log', and 'Permissions'. The main content area shows 'Selected Version: 4 | Amended | Approved'. Below this is a 'Protocol Information' table:

Protocol Information			
Review Type	Status	Submission Number	Approval Date
Expedited	Approved	2	Apr 22, 2026
Continuing Review Date	Expiration Date	Initial Approval Date	Initial Review Type
Oct 22, 2026	Mar 22, 2027	Apr 22, 2026	Exempt

The right sidebar contains several action buttons: Amend, Renew (highlighted with an orange arrow), Renew & Amend, Action Items Summary, Admin Notes & Files, Request Close, and Print.

- 3 Complete the Renewal questions that appear at the top of your submission.

- 4 Make note of the sections that are locked down from your current amendment.

- 5 Click on the Selected Version dropdown at the top of the protocol and note the Active flag on the Active Amendment.

The screenshot shows the 'IRB: #9 My Important Project' page in the Kuali Research system. At the top, there are navigation tabs: Protocol, Reportable Events, Activity Log, and Permissions. The main content area displays the project details for the selected version (5 | Renewal | In Progress). A dropdown menu is open, showing the version history: 5 | Renewal | In Progress (highlighted with an orange arrow), 4 | Amended | Approved, 3 | Amendment | Merged Amendment, 2 | Initial | Superseded, and 1 | New | Revisions Required. Below the version history, there is a table with the following data:

Status	In Progress	Submission Number	3	Approval Date	--
Continuing Review Date	--	Expiration Date	--	Initial Approval Date	Apr 22, 2026
				Initial Review Type	Exempt

On the left side, there is a sidebar with a 'Progress Report' section containing several items with green checkmarks: Information, Questionnaire, Consent Checklist, Review Categories, Review Type, Details, Documents, and Certification. On the right side, there is a vertical menu with options: Notify PI To Sub, Admin Notes & F, Abandon, Submit, and Print.

6 Press the **Submit** button

7 Click on **Activity Log** and confirm that there are entries for the Version Renewal and Submit actions.

Activity 7 – Create a Reportable Event

Step No. Instructions

As the PI on the previous protocol

From the **Manage Protocols** screen:

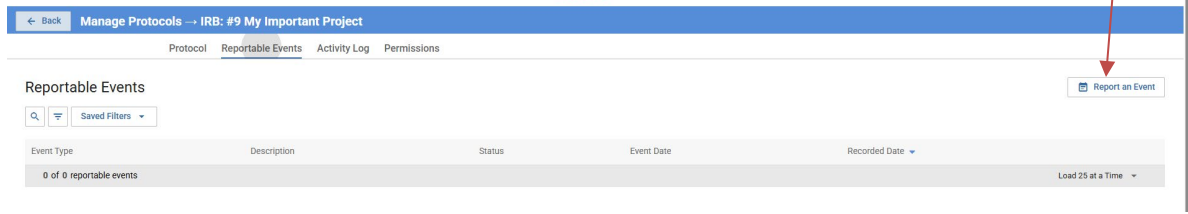
- 1
 - Click **Saved Filters** and select **No Filter**
 - Click **Advanced Filter** at the top of the screen.
 - Click **+Add Rule** and enter the following details
 - **First Dropdown: PI Name**
 - **Second Dropdown: contains**
 - **Third Dropdown: <your initials>**
 - Click in the grey area

- 2
 - Confirm that your Protocol displays a version in **Approved** status
 - Click on the Title of your protocol.

Click on the **Reportable Events** tab at the top of the screen and press **Report an Event**.

- 3

Protocol Information			
Review Type Expedited	Status Approved	Submission Number 3	Approval Date Apr 22, 2026
Continuing Review Date Oct 22, 2026	Expiration Date Mar 20, 2028	Initial Approval Date Apr 22, 2026	Initial Review Type Exempt



4 Complete all the fields that display and click [Submit for Review](#)

5 Click on [Activity Log](#) to review the actions that have taken place on this reported event.