

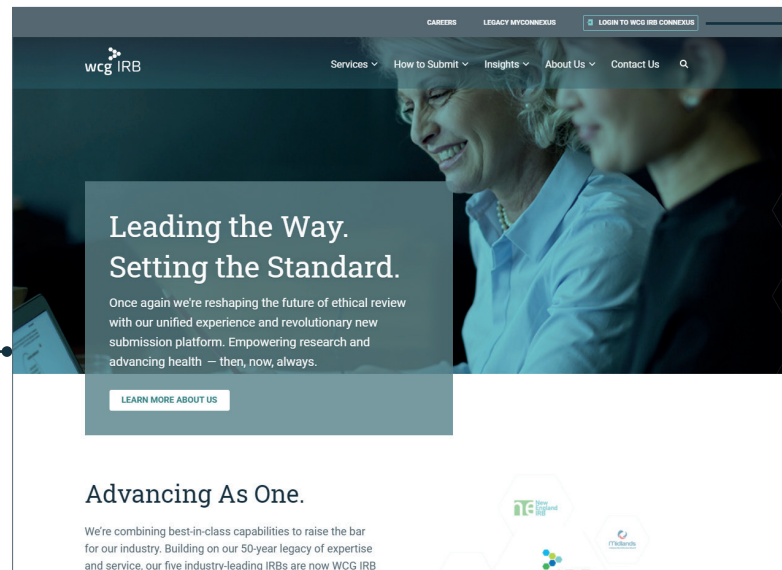
System Access

How do I access the WCG IRB Connexus Portal?

The two most common ways to access the WCG IRB Connexus portal are:

1 Access via WCGIRB webpage:

Navigate to www.wcgirb.com and click on the **LOGIN TO WCG IRB CONNEXUS** link.



2 Access directly via the login page:

To bypass the main webpage and go straight to the Connexus login page, navigate to connexus.wcgirb.com.

i If you are an existing user in the legacy system, and you are logging in for the first time, you will need to first reset your password, accept the terms of use and ensure you are using the same email address that was associated with your legacy account.

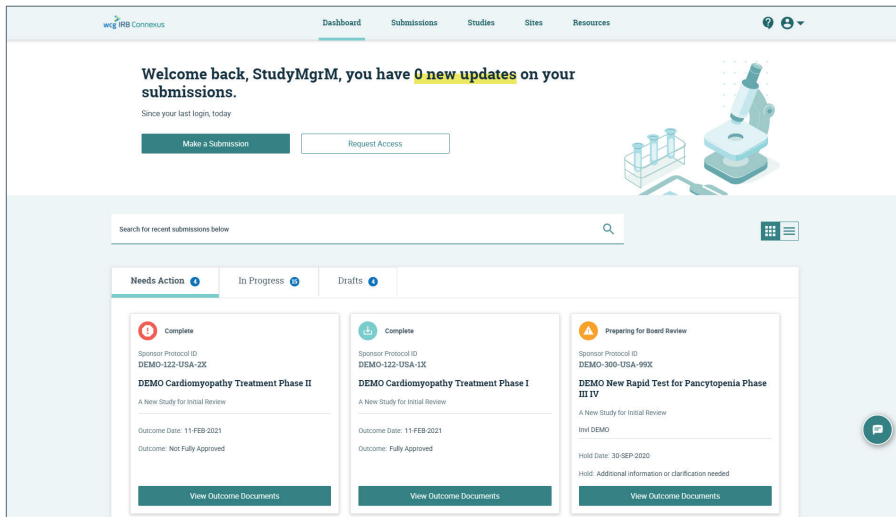
What if I don't have an account?

If you are new to Connexus (you have never used Connexus in the past), then you will need to create an account.

Method 1: Click the **Create a new account** button found on the login page to get started. Once you log in, you will need to **request access** to your study-sites.

Method 2: A Site Manager invites you to a study-site from within Connexus. This method will generate a notification with a link you can use to start the registration process. Once you log in, you will automatically have **access to that site**.

Navigation



Need Help?



Search the Resources page to learn more about working with Connexus. The Resources page can be accessed from the top navigation menu, and contains a user guide, instructional videos, and task-oriented quick reference guides.



If you need help, you can click the “Need Help” icon to access WGC IRB Client Services Contact Information.



You can live chat with a member of client services in real time by clicking on the chat icon on the bottom right side of the page. This tool can be used during Client Services hours of operation.

How do I use the Dashboard?

As the default landing page, the Dashboard is where you will likely spend a lot of your time in Connexus. The following can be achieved using the Dashboard:



Track “In Progress” Submissions:

The Dashboard spotlights your “In Progress” submissions, including any that require immediate attention. Use the submission information displayed within the **Needs Action** and **In Progress** tabs to:

- Monitor the progress submissions under review
- Learn more about additional actions that may need to be taken on any submissions tagged as “Needs Action”
- Download outcome documents from recently approved submissions (displayed under Needs Action for 10 days after approval).



Make a Submission:

Use the **Make a Submission** button to create a new submission for review. However, it is important to make sure the study-site does not already exist first. See **Add a New Site to a Study** before using **Make a Submission** to add your site to Connexus.



Request Access to a Site:

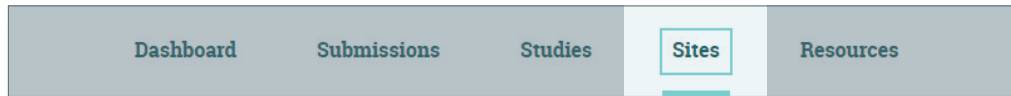
Used to request access to your specific study site. In most cases you will be requesting access to a site, and not the study. See **Proper Method for Requesting Access** to learn more.

Make a Submission

Request Access

Where is my Study-Site Information?

In Connexus, a study-site is the entry on the **Sites** page that displays your site information as it pertains to a specific study. Therefore, your site may be displayed multiple times on the sites page as each instance represents your site as it is associated with a specific study. Each site details page displays study-site information such as associated submissions, outcome documents, PI Name, and contacts.



Sites			
Search			
PI Name	Sponsor	Sponsor Protocol ID	IRB Tracking ID
DEMO_Inv100	DEMO_Sponsor9	DEMO-900-USA-1X	20200185

1 Locate the specific Study-Site:

Use the available search bar to locate the specific study-site you need to access, then click on the **PI Name** for that site to access the **Site Details** page.

2 Locate Study-Site Information and Documentation:

The **Site Details** page displays information about that study-site as well as providing links to any study-site specific submissions, and an interface to view or download outcome documents

Study Name			
DEMO Anti-Depressant Therapy Phase I			
Sponsor	Sponsor Protocol ID	Initial Approval	Last Review
DEMO_Sponsor10	DEMO-118-USA-1X	05-JAN-2021	05-JAN-2021
Expiration	IRB Tracking ID	Institution Tracking ID	Status
05-JAN-2022	20201230	n/a	Approved
PI Details			
InvK DEMO			
Independent Practice United States 11 West San Diego CA 88888			
epstrainingite+DEMOInvK@gmail.com 11			

Submissions Outcome Documents Contacts

Start Date End Date Search

What if I can't find my site?

- Ensure that you are looking on the **Sites** (✓) page and not on the **Studies** (✗) page



The Sites page displays your study-site information, whereas the Studies landing page is typically only used by Sponsors or CROs for protocol-level activities.

- If you still cannot find your study-site, you may have to request access to the study-site in Connexus. See **Proper Method for Requesting Access** for more information.

Proper Method for Requesting Access

To request access, click the **Request Access** button on the Dashboard.

Request Access

1 Select the option "Site":

This will allow you to request access for a study-site. Do **not** select "Study".

2 Search by the site's PI name:

Search for the study-site by entering the site's PI name in the form "Last Name, First Name", and then click **Search**.

3 Enter the IRB Tracking ID (if necessary):

This step is only necessary if the PI you searched for is associated with more than one site in the Connexus system. You can obtain the **IRB tracking ID** from the study team.

4 Submit your request for access:

After locating the correct study-site using the search tools above, you can click the **Submit Request** button. This will send an email notification to the study-site manager, who will be responsible for granting you access. You will receive a confirmation email notifying you if your request has been granted or denied, and if granted, what permission level you have been assigned for this study-site.

Request Access ✕

I'm asking the manager for access to a:

Study Site 💡 Select "Study" to request access that includes all sites in the study. Choose "Site" for access to one specific site.

Search

Search by PI name (format: last name, first name)

Submit ID

There is a match for your search

Sponsor	Sponsor Protocol ID	IRB Tracking ID
DEMO_Sponsor2	DEMO-250-CAN-37X	20200204

Submit request

Add a New Site to a Study

1 Search Connexus to ensure the study-site does not already exist:

To do this, first search your [sites page](#). If you do not find the site there, contact your study team to see if the site already exists in Connexus. If it does, you may [request access](#) to the study-site.

2 Add a new site to an existing study:

To add a new site to an existing study, click the **Make a Submission** button on the Dashboard.




Make a Submission

3 Select the option "Add Principal Investigator/Site":

This will allow you to submit the site for an existing study.



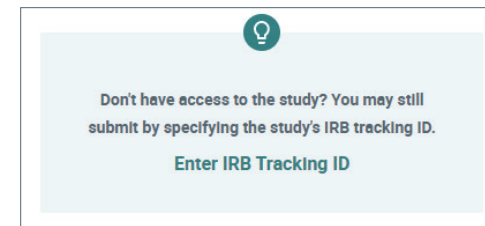
If you are the submitter for a new site, you will automatically receive Manager access to that new site.



Add Principal Investigator/Site

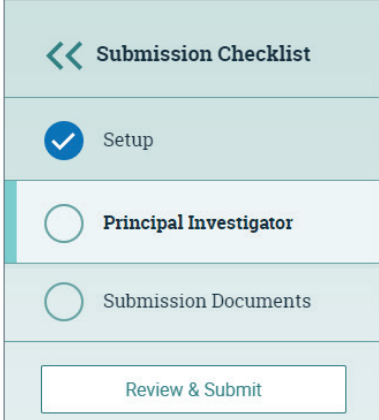
4 Define your submission and select the study to which you're adding a new site:

One of the first steps in the submission process is to indicate to which study the new site being submitted for approval should be associated. When submitting a new site yourself, you will likely need to enter the IRB Tracking ID to associate the study.



5 Complete your submission form and submit for IRB Review:

The Submission Checklist will guide you through the submission process by presenting you with questions based on your submission type, answers to your setup questions, and answers to some questions within the checklist itself. After you have completed the submission checklist, you can submit for IRB review by clicking the **Review & Submit** button.



← Submission Checklist

- Setup
- Principal Investigator
- Submission Documents

Review & Submit

Manage Study-Site Contacts

The screenshot shows the 'Sites' tab selected in the navigation menu. The study name is 'DEMO, InvK'. Below the name, there is a 'Manage Contacts' button. The study details are as follows:

Study Name	DEMO Osteomyelitis Treatment Phase 1 Study		
Sponsor	Sponsor Protocol ID	Initial Approval	Last Review
DEMO_Sponsor10	DEMO-100-USA-1X	02-OCT-2020	02-OCT-2020
Expiration	IRB Tracking ID	Institution Tracking ID	Status
02-OCT-2021	20200197	n/a	Approved

1 Navigate to the Manage Contacts page:

To access the Manage Contacts page, click the **Manage Contacts** button on a study-site's Site Details page. See [Where is my Study-Site Information](#) to learn how to access a site details page.

2 Manage existing contacts:

On the **Contacts** tab of the Manage Contacts page, you can edit permissions and remove access for existing contacts. You can also directly invite new contacts from this tab.

3 Manage requests for site access:

This is where all pending requests for access to this site queue until they are reviewed by a study manager. Requests can be approved or rejected. Requesting users will receive an email letting them know if their request has been approved or rejected.

The screenshot shows two tabs: 'Contacts' and 'Requests'. The 'Requests' tab has a blue circle with the number '2' next to it, indicating it is the focus of the next step.

What if I don't see the Manage Contacts Button?

Only site users with the Manager permission can access the Manage Contacts page. See [Site Roles and Notifications](#) for more information.

- Ensure that you are starting your search from the Sites (✓) page and not on the Studies (✗) page
- Verify that you are viewing the correct study-site. You may have different permissions for each site that you can access in Connexus.
- Contact the site manager to update your permissions if you believe you should have manager access

Site Roles and Notifications

	Manager	Submitter	Read Only
Manage user access (add/edit/remove)	✓		
Make submissions	✓	✓	
View and download submission documents	✓	✓	✓
View and download outcome documents	✓	✓	✓

What notifications can I expect to receive?

All three roles will receive notifications when submissions were made on behalf of the site, or when outcome documents have become available. Users with the manager role will additionally receive notifications whenever requests for access are submitted, or when they are processed for the site. Therefore, it is important for site managers to plan accordingly to receive those additional notifications.

What are the site roles and permissions?

The three available roles for each site are:

Manager: This role is specifically tasked with managing user access to the site. **Therefore, each site must have at least 1 manager.**

Submitter: This role has the ability to make submissions on behalf of the site.

Read Only: This role can view the site details page, as well as view and download any available submission documents and outcome documents.

	Notification Types		
	Access requests	Submissions made on behalf of the site	Outcome documents available for the site
Manager	✓	✓	✓
Submitter	N/A	✓	✓
Read Only	N/A	✓	✓