

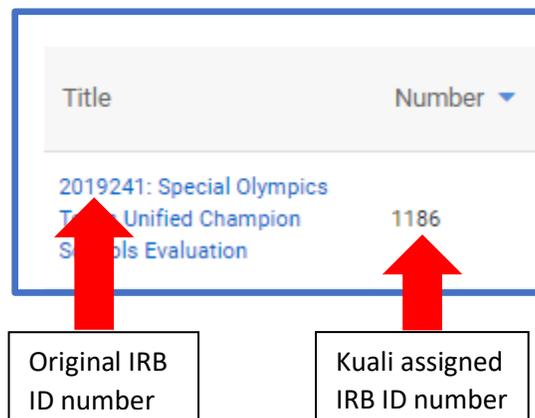
How to Navigate “Legacy” Studies

“**Legacy**” studies are the existing IRB studies prior to 3/15/22 that were migrated to Kuali. Over 1500 legacy studies were migrated to Kuali including studies in “closed” status.

The following were NOT migrated to Kuali:

- Purged studies (closed studies already destroyed per retention policy)
- Withdrawn studies (studies that were withdrawn/abandoned by the PI from IRB review)

All legacy studies will include the **original IRB number** in the study title to assist researchers in finding studies. They will also have a **new IRB ID number** assigned by Kuali.



Note: New studies going forward that are created in Kuali will only have the IRB ID number assigned by Kuali. This is a system-assigned number, and the Kuali numbering convention is consecutive.

Basic study information has also been populated into the online form such as the PI, study title, department, funding. Below the Personnel table, there is a list of the names of “other personnel (legacy data).”

Other Personnel (Legacy Data)

This section should not be used on new protocols created in Kuali.

	NAME
No Action Items	Anna Dalton

The “**other personnel (legacy data)**” section is for Legacy studies only. Names may not be current. Through an Amendment, the PI must move the names to the Personnel table above. Then, delete from the Other Personnel (Legacy Data) section.

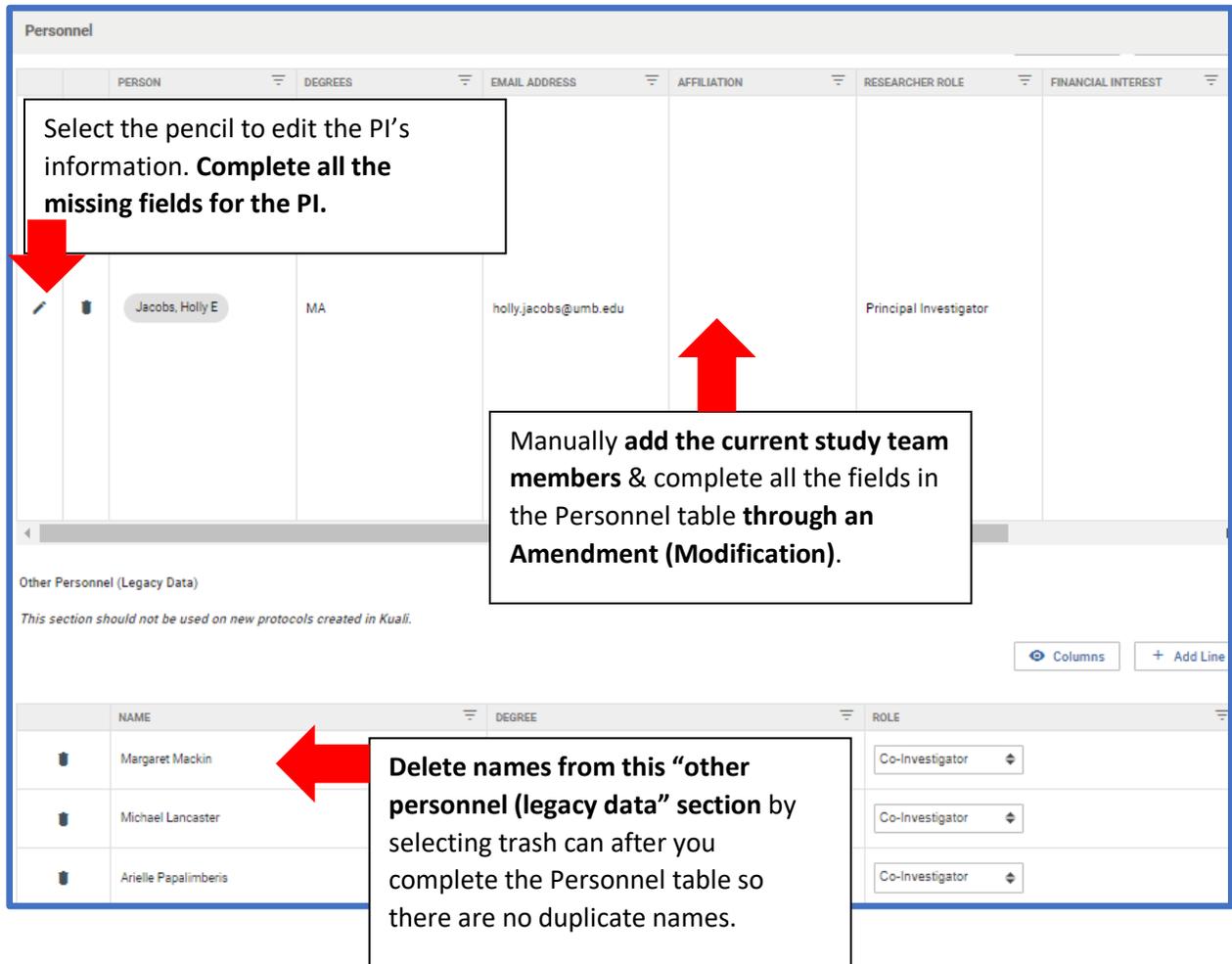
Please note that the “**other personnel (legacy data)**” section is text only and does not give the people in this section any user abilities to the study in Kuali. Also, this section may be incomplete and may not be accurate at the time of continuing review or modification. To add project personnel to the Personnel table, you must do so with an **amendment** (see additional details below).

Important information regarding legacy studies:

1. It is important to note that **initially only the PI has access to a legacy study. If a study/project coordinator was provided, they will also have full access initially.** The remaining study team members were not migrated to the study in Kuali except for in text form only in the “other personnel (legacy data)” section.
2. **Initially, only the PI will be able to view and edit their legacy studies in Kuali.*** If the PI is a graduate student, the faculty advisor will also have full access. If a study/project coordinator was provided, they will also have full access initially.
3. Therefore, the **first time the PI creates an amendment (modification)** for the study, they must complete the missing fields in the study, **add the study team members to the Personnel table, and update the PI information** (see Image 1 on next page). If a study/project coordinator was provided, they can also complete these steps, but the PI will need to “submit” the amendment (the study/project coordinator can “notify the PI to submit”). [Refer to the written instructions in the Kuali IRB User Manual or watch the short videos on the IRB web site.](#)
 - a. Through an amendment, the PI (or study/project coordinator) **must** complete the missing fields in the form including **manually adding the current study team members to the Personnel table** (see Image 1 on next page).
 - b. Once the appropriate people are manually added to the Personnel table by the PI (or study/project coordinator), then those additional people will also have access (full access or read only as specified by the PI) to the study in Kuali.
 - c. Delete the names from the “other personnel (legacy data)” section once you have completed the Personnel table (see Image 1 on next page).
 - d. The PI (or study/project coordinator) must continue to complete the other sections of the form that are blank and **upload the IRB-approved study attachments** (protocol, consent, recruitment materials, data collection instruments, etc.) **at the time of their first amendment (modification) submission in Kuali.**

***Important!** The PI may need assistance with Kuali from another study team member in creating the amendment or renewal & amendment. Contact the IRB (irb@umb.edu) if you need to allow someone on the study team other than the PI have full access to the specific study in Kuali to help create the submission in Kuali. The IRB can give that person “permission” to access the specific study in Kuali.

Image 1



The screenshot displays the 'Personnel' table in the Kuali system. The table has columns for PERSON, DEGREES, EMAIL ADDRESS, AFFILIATION, RESEARCHER ROLE, and FINANCIAL INTEREST. A callout box with a red arrow pointing to the pencil icon in the first row says: "Select the pencil to edit the PI's information. **Complete all the missing fields for the PI.**" The first row contains the name 'Jacobs, Holly E', degree 'MA', email 'holly.jacobs@umb.edu', and role 'Principal Investigator'. A second callout box with a red arrow pointing to the first row says: "Manually **add the current study team members** & complete all the fields in the Personnel table **through an Amendment (Modification).**" Below the main table is a section titled 'Other Personnel (Legacy Data)' with a note: "This section should not be used on new protocols created in Kuali." This section contains a table with columns NAME, DEGREE, and ROLE. It lists three names: Margaret Mackin, Michael Lancaster, and Arielle Papalimberis, all with the role 'Co-Investigator'. A callout box with a red arrow pointing to the trash can icon in the first row of this section says: "Delete names from this **“other personnel (legacy data”** section by selecting trash can after you complete the Personnel table so there are no duplicate names."

PERSON	DEGREES	EMAIL ADDRESS	AFFILIATION	RESEARCHER ROLE	FINANCIAL INTEREST
Jacobs, Holly E	MA	holly.jacobs@umb.edu		Principal Investigator	

Other Personnel (Legacy Data)
This section should not be used on new protocols created in Kuali.

NAME	DEGREE	ROLE
Margaret Mackin		Co-Investigator
Michael Lancaster		Co-Investigator
Arielle Papalimberis		Co-Investigator