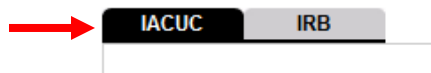


Create a Protocol

Important: A protocol can be created, edited and submitted by the Principal Investigator (PI), Laboratory Contact or Alternate Lab Contact. **However, ONLY the Principal Investigator can complete two sections of the protocol:**

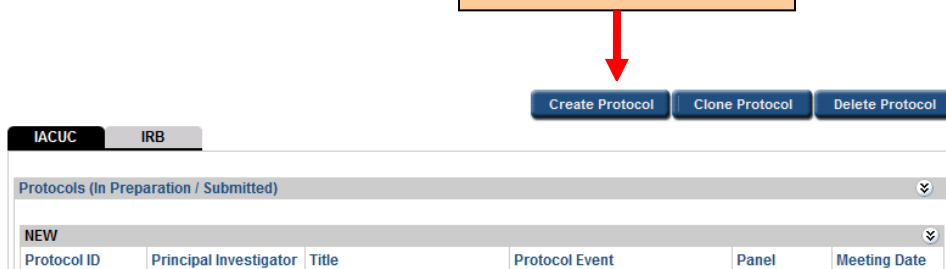
- Only the PI of the grant or subcontract can add his or her own SPO Funding information in the **Funding Sources** section of the protocol. The PI of the grant or subcontract must also be listed in the Personnel Information section of the protocol in one of the following roles: Principal Investigator, Laboratory Contact or Alternate Lab Contact. Training grants can be added by anyone in the one of the aforementioned roles.
- Before the eProtocol system will permit the protocol to be submitted, the PI must log into the system and check the appropriate box in the **Certification** section of the protocol, accepting the responsibilities of the PI. This requirement exists as an electronic substitute for an ink signature from the PI.

- 1) Log in to eProtocol with your CalNet ID & password at: <https://eprotocol.berkeley.edu>
- 2) UC Berkeley uses both IACUC and IRB modules of eProtocol. Click on the **IACUC** tab to see your Investigator Home Page for ACUC submissions.



- 3) Click on the **Create Protocol** button to start a new application.

Click on **Create Protocol** to start a new application.



- 4) Enter your **Study Title** in the text box.
 - a. The Study Title should be descriptive (e.g., “Mesodermal Specification and Segmentation in Zebrafish” rather than “Master Animal Use Protocol for Research”).



The screenshot shows a text input field labeled 'Study Title' with the placeholder text 'Type your study title here...'. To the right of the text box are two buttons: 'Create' and 'Cancel'.

5) Select the **IACUC checkbox** and the **Animal Use Protocol** radial button.

eProtocol » Investigator » [Home](#) » Create Protocol

Select the **IACUC** checkbox and the **Animal Use Protocol** button

IACUC IRB

IACUC

Animal Use Protocol

6) Scroll down and **enter the Principal Investigator**.

- a. The person listed on the protocol as Principal Investigator (PI) must be an employee of UCB (usually with an academic appointment) who is eligible under [University policy](#) to submit proposals for extramural support of a research, teaching, or public service project, and to perform research involving the use of animals.
- b. You will not be able to type into the name field. Click on the **binocular** icon to look up the person.

Click on the **binocular** icon to search for PI

Principal Investigator*

(Must have PI status or Exceptional PI status at UCB Berkeley)

Name	Title
<input type="text"/>	<input type="text"/>
Email	Office Phone
<input type="text"/>	<input type="text"/>
Lab Phone	Emergency Phone
<input type="text"/>	<input type="text"/>
Department	Mail Code
Select One <input type="text"/>	<input type="text"/>
Campus Mailing Address	
<input type="text"/>	

Laboratory Contact

Name	Title
<input type="text"/>	<input type="text"/>
Email	Office Phone
<input type="text"/>	<input type="text"/>
Lab Phone	Emergency Phone
<input type="text"/>	<input type="text"/>
Department	Mail Code
Select One <input type="text"/>	<input type="text"/>
Campus Mailing Address	
<input type="text"/>	

Alternate Lab Contact

Name	Title
<input type="text"/>	<input type="text"/>
Email	Office Phone
<input type="text"/>	<input type="text"/>

- c. In the **Find User** popup, enter the person's **first name** and/or **last name**. Then, click on the **Find** button.

Find User Find

User ID:

First Name:

Last Name:

Enter first & last name and click **Find**.

- d. To select the person, click on the **checkbox** next to their **name**, and then click on the **OK** button. Information from the CalNet Directory will merge into the fields under Principal Investigator. If this information is incorrect, you will be able to edit it (with the exception of the name field).

Find User Find

User ID:

First Name:

Last Name:

Select the **User** and click on **OK**.

	User ID	User Name	Title	Department	Email
<input checked="" type="checkbox"/>	212386	EMP-FACULTY TEST	Programmer Analyst IV		test@uclink.berkeley.edu
<input type="checkbox"/>	322587	EMP-FACULTY-02 TEST	Programmer/Analyst - IST-Infrastructure Services	Directory Architect	test-322587@berkeley.edu
<input type="checkbox"/>	322588	EMP-FACULTY-03 TEST	Programmer/Analyst - IST-Infrastructure Services	Directory	test-322588@berkeley.edu

Select User OK

IACUC - Research Protocol ID: 14-07-3748 (EMP-FACULTY TEST)

Protocol Title: Type your study title here... Save | Spell Check | Help | Close

Previous Next

Personnel Information

Principal Investigator*
(Must have PI status or Exceptional PI status at UC Berkeley)

Name	EMP-FACULTY TEST	Title	Programmer Analyst IV
Email	test@uclink.berkeley.edu	Office Phone	+1 (510) 643-1234
Lab Phone	<input type="text"/>	Emergency Phone	<input type="text"/>
Department	Select One	Mail Code	94720-3804

Directory data merged into fields, can edit

- 7) If you are NOT the Principal Investigator, **enter yourself** in the appropriate role as either Laboratory Contact or Alternate Lab Contact. *You do not need to enter other personnel at this point to proceed.*
- 8) Scroll to the top or to the bottom of the screen and click on the **Create** button. This will open the Animal Use Protocol form for you to complete.

eProtocol » Investigator » [Home](#) » Create

Click on the **Create** button to start your application form.

Study Title
Type your study title here...

IACUC IRB

IACUC

Animal Use Protocol

- 9) Using the eProtocol navigation buttons in the left margin and the top or bottom right corners, complete the screens from **Personnel Information** through **Certification**.

*Note: You must complete **Personnel Information** through **Funding Sources** before you will be able to move back and forth freely in the application form. Responses in the first five sections will dictate which questions are required in **Protocol Information**.*

IACUC - Research Protocol ID: 14-07-3748 (EMP-FACULTY TEST)

Protocol Title: Type your study title here...

Save | Spell Check | Help | Close

Previous Next

Personnel Information

Principal Investigator*
(Must have PI status or Exceptional PI status at UC Berkeley)

Name	Title
EMP-FACULTY TEST	Programmer Analyst IV
Email	Office Phone
test@uclink.berkeley.edu	+1 (510) 643-1234
Lab Phone	Emergency Phone
Department	Mail Code
Select One	94720-3804

- 10) Click on the **Next** arrow to save your entries and proceed to the next section of the protocol.
- 11) If you have not completed required field that are indicated by a red asterisk (*), you will not be able to proceed to the next section.
- 12) You can close the protocol at any time and access it again from your Investigator Home Page (see [eProtocol Quick Guide: Edit a Protocol Not Yet Submitted](#)).
- a. **Save** the page you are working before clicking on **Close** to close the protocol.
 - b. Always **Sign Out** to exit eProtocol and close your browser when you are done.
- 13) When ready to submit to OACU/ACUC, see eProtocol [Quick Guide: Submit Protocol Application](#).