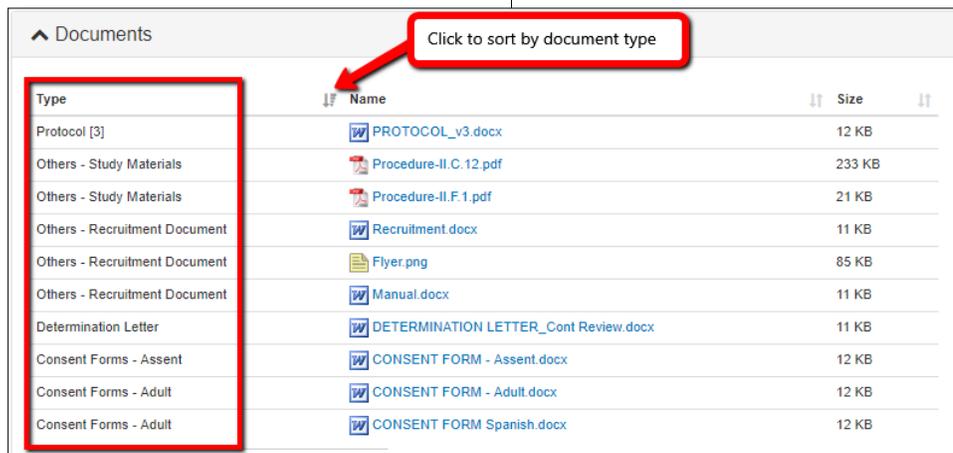
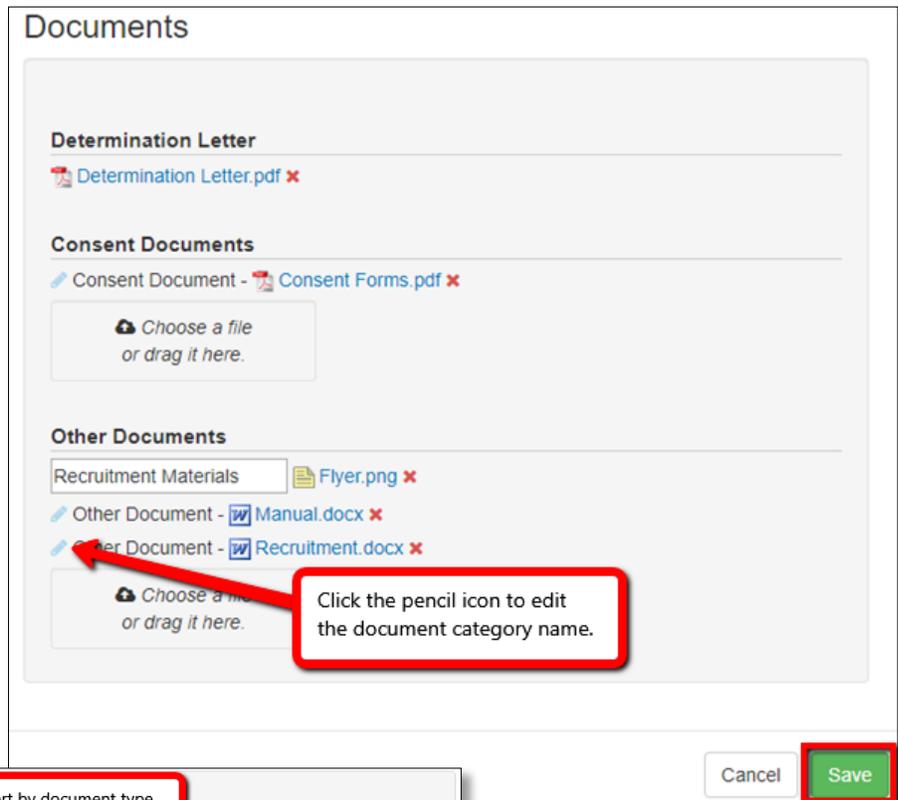
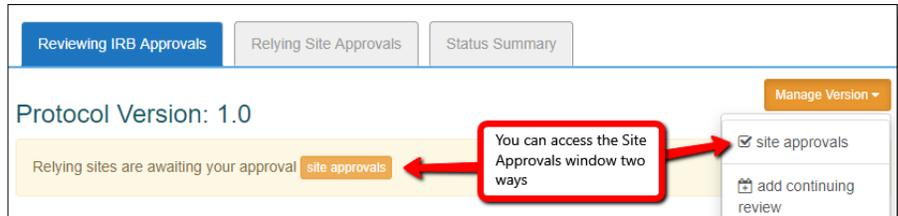


Customizing Approval Document Types in IREx

IREx Study Managers and Reviewing IRB Liaisons can customize certain types of approval documents to provide more specific labels and allow for better grouping of documents when sorted. Any document uploaded as an “Other” document can be renamed to include a specific document type (e.g., Recruitment materials, Questionnaires, Case Report Forms, Study Materials).

How to Customize the Approval Document Type:

1. On the study page, click **site approvals** to access the Relying Site Approvals upload window. [Note: The Reviewing IRB can also customize “Other” documents uploaded to the Reviewing IRB tab.]
2. For each site, click the **blue pencil icon** next to the document you wish to re-categorize. [Note: If you do not see a pencil, you cannot rename that type of document. It is a standard, required document.]
3. Enter or edit the new document name (e.g., recruitment materials, study materials, etc.). You can edit multiple documents before saving your changes.
4. Click **Save** to save your changes.
5. The new document type(s) will appear under the Relying Site Approvals “Documents” for that site.



6. Click the arrow icon to sort the documents alphabetically by document type.