Trigger	Subject Line	Standard Template	Sent To	Legend
Add Comment	<ID> received a comment	IRB_A_AddComment	Recipients selected in activity form (see the context help within the activity for details)	**PI:** Principal Investigator **ST:** Study Team **IRBC:** IRB Coordinator **CM:** Committee Member **DR:** Designated Reviewer
Add Participating Sites	<ID> added participating sites	IRB_A_AddParticipatingSites (for multi-site studies)	IRBC	
Add Private Comment	<ID> received a private comment	IRB_A_AddPrivateComment	Recipients selected in activity form	
Assign Coordinator	<ID> assigned as coordinator	IRB_A_AssignCoordinator	IRBC	
Assign To Committee Review	<ID> assigned to committee review	IRB_A_Assigned_To_Committee_Review	IRBC	
Assign Primary Contact	<ID> primary contact assigned	IRB_A_AssignPrimaryContact_Exchange (for site submissions)	sIRB IP points of contact	
Assign Responsible Party	<ID> responsible party has changed	IRB_A_AssignResponsibleParty	Submitter of RNI, new responsible party, plus related studies' PIs, PI proxies, and primary contacts	
Close Study (Admin)	<ID> has been closed	IRB_A_CloseStudy_Admin	PI, PI proxies, primary contact	
Confirm Reliance	<ID> reliance confirmed	IRB_A_ConfirmReliance	PI, PI proxies, primary contact	
Continuing Review Closed (when study has been closed)	<ID> has been closed	IRB_A_ContinuingReview_Closed	PI, PI proxies, primary contact	
Continuing Review Deadline Reminder	<ID> nearing deadline for continuing review	IRB_A_ContinuingReviewDeadlineReminder	PI, PI proxies, primary contact	
Continuing Review Not Required Periodic Reminder	<ID> reminder	IRB_A_ContinuingReviewNotRequiredPeriodicReminder	PI, PI proxies, primary contact	
Correspond with sIRB	Correspond with sIRB Activity	IRB_A_CorrespondWithSirb_Exchange	IRBC	
Correspond with Site	<ID> correspondence	IRB_A_CorrespondWithSite_Exchange	Recipients selected in activity form	
Create Study	<ID> study downloaded from IRB Exchange	IRB_A_CreateStudy	pSite PI	
	<ID> study downloaded from IRB Exchange - exchange*	IRB_A_CreateStudy_Exchange	sIRB IP points of contact	
Finalize Updates	<ID> updates finalized	IRB_A_FinalizeUpdates	IRBC (or if no IRBC is assigned, all IRBCs assigned to the associated IRB office)	
Manage Ancillary Reviews	<ID> assigned for ancillary review	IRB_A_ManageAncillaryReview_Organization	Organization's ancillary reviewers	
		IRB_A_ManageAncillaryReview_Personal	Ancillary reviewer	
Report Continuing Review Data	<ID> continuing review data reported	IRB_A_ReportContinuingReviewData	If site on pSite side§, sent to pSite PI, pSite primary contact, pSite reliance coordinators, pSite IRBC If site on sIRB side§, sent to sIRB PI, sIRB primary contact	
	<ID> continuing review data reported - exchange*	IRB_A_ReportContinuingReviewData_Exchange	If site on pSite side§, sent to sIRB PI If site on sIRB side§, sent to pSite PI, pSite primary contact, pSite IP points of contact	
Request Clarification by Committee Member	<ID> clarification was requested	IRB_A_RequestClarificationByCommitteeMember (for non-RNI submissions)	PI, PI proxies, primary contact	
		IRB_A_RNIRequestClarificationByCommitteeMember (for RNI submissions)	Submitter of RNI, plus related studies' PIs, PI proxies, and primary contacts	
Response Time Exceeded	<ID> is waiting for required action	IRB_A_ResponseTimeExceeds_ActionReminder	RNI responsible party	
	<ID> is waiting for clarification	IRB_A_ResponseTimeExceeds_ClarificationReminder (for non-RNI submissions)	PI, PI proxies, primary contact	
		IRB_A_RNI_ResponseTimeExceeds_ClarificationReminder (for RNI submissions)	Submitter of RNI, plus related studies' PIs, PI proxies, and primary contacts	
	<ID> is waiting for required modifications	IRB_A_ResponseTimeExceeds_ModificationReminder	PI, PI proxies, primary contact	
Revert to Pre-2018 Requirements	<ID> reverting to pre-2018 requirements	IRB_A_RevertToPre2018Requirements	Recipients selected in activity form	
Review Required Actions	<ID> requires additional action	IRB_A_ReviewRequiredActions	Submitter of RNI, responsible party, plus related studies' PIs, PI proxies, and primary contacts	
Send Letter (in states other than Post-Review)	<ID> letter was updated	IRB_A_SendLetter (for non-RNI submissions)	PI, PI proxies, primary contact	
		IRB_A_RNI_SendLetter (for RNI submissions)	Submitter of RNI, responsible party, plus related studies' PIs, PI proxies, and primary contacts	
	<ID> letter was sent	IRB_A_SendLetter_MSS (for multi-site study RNI submissions)	Related studies' PI, primary contact	
		IRB_A_SendLetter_MSS_Exchange (for multi-site study RNI submissions)	Reporting pSite PI, primary contact	
Assign Designated Reviewer	<ID> assigned for designated review	IRB_A_RNI_Send to Designated Reviewer (for RNI submissions)	Designated reviewer	
		IRB_A_Send to Designated Reviewer (for non-RNI submissions)	Designated reviewer	
Submit†	<ID> assigned for ancillary review	IRB_A_Submit_AncillaryReview_Organization	Organization's ancillary reviewers	
		IRB_A_SubmitAncillaryReview_Personal	Ancillary reviewer	
Submit Response	<ID> updated	IRB_A_SubmitResponse_Exchange (for site submissions)	sIRB IP points of contact	
Submit Site Materials	<ID> site materials submitted	IRB_A_SubmitSiteMaterials	IRBC (or if no IRBC is assigned, all IRBCs assigned to the associated IRB office)	
Update from IRB Exchange	<ID> updated from IRB Exchange	IRB_A_UpdateFromIRBExchange	IRBC	
Update from IRB Exchange (Admin)	<ID> updated from IRB Exchange	IRB_A_UpdateFromIRBExchangeAdmin	IRBC	
Transition Active > Inactive	<ID> has been deactivated - pSite side*	IRB_T_Active_Inactive	PI, PI proxies, primary contact	
	<ID> has been deactivated - sIRB side*			
	<ID> has been deactivated - exchange*	IRB_T_Active_Inactive_Exchange (for site submissions)	If sIRB side, sent to pSite IP points of contact If pSite side, sent to sIRB IP points of contact	
Transitions Clarification Requested (Pre-	<ID> updated with clarifications	IRB_T_Changes Requested_Submit Changes (for non-RNI submissions)	IRBC	
Transition Clarification Requested (Designated			Designated reviewer	
Transition Deferred > Pending sIRB Review	<ID> updated	IRB_T_Deferred_PendingSirbReview	IRBC	
Deferred > Pre-Review	<ID> updated	IRB_T_Deferred_PreReview	IRBC	
Transition Disapproved > Pending sIRB Review	<ID> updated	IRB_T_DisApproved_PendingSirbReview	IRBC	
Transition Disapproved > Pre-Review	<ID> updated	IRB_T_Disapproved_PreReview	IRBC	

Transition	ID message	Notification template	Recipients
Transition External IRB > Closed	<ID> has been closed	IRB_T_ExternalIRB_Closed	PI, PI proxies, primary contact
Transition Inactive > Pre-Review	<ID> updated with clarifications	IRB_T_InactiveToPre-Review (for site submissions)	IRBC, Committee Chair
Transition Invitation Pending > Awaiting Site Material	<ID> participating site invitation approved	IRB_T_InvitationPendingToAwaiting SiteMaterials (for site submissions)	sIRB PI, primary contact
	<ID> participating site invitation approved - exchange*	IRB_T_InvitationPendingToAwaiting SiteMaterials_Exchange (for site submissions)	pSite IP points of contact
Transition Invitation Pending > Inactive	<ID> participating site invitation declined	IRB_T_InvitationPendingToInactive (for site submissions)	sIRB PI, primary contact
Transition Modifications Required > Modifications Submitted	<ID> updated with required modifications	IRB_T_ModificationsRequired_ModificationsSubmitted	IRBC, Committee Chair
Transition Modifications Required > Pending sIRB Review	<ID> updated with required modifications	IRB_T_ModificationsRequired_PendingSirbReview	IRBC
Transition Post-Review > Active	<ID> has been activated - pSite side*	IRB_T_Post-Review_Active (for site submissions)	pSite PI, PI proxies, primary contact
	<ID> has been activated - sIRB side*		sIRB PI, PI proxies, primary contact
	<ID> has been activated - exchange*	IRB_T_Post-Review_Active_Exchange (for site submissions)	If pSite, sent to sIRB IP points of contact If sIRB, sent to pSite IP points of contact
Transition Post-Review > Approved	<ID> has been approved - sIRB side*	IRB_T_Post-Review_Approved	sIRB PI, PI proxies, primary contact
	<ID> has been approved - study, pSite*		Local PI, PI proxies, primary contact
	<ID> has been approved - exchange*	IRB_T_Post-Review_Approved_Exchange (for multi-site studies)	pSite PI, primary contact, IP points of contact
Transition Post-Review > External IRB	<ID> has been approved	IRB_T_Post-Review_Approved	PI**, PI proxies, primary contact
Transition Pending sIRB Review > Disapproved	<ID> has been disapproved - study, pSite*	IRB_T_Post-Review_Disapproved	PI, PI proxies, primary contact
Transition Post-Review > Disapproved	<ID> has been disapproved - study, pSite*	IRB_T_Post-Review_Disapproved	Local PI, PI proxies, primary contact
	<ID> has been disapproved - sIRB side*		sIRB PI, PI proxies, primary contact
	<ID> has been disapproved - exchange*	IRB_T_Post-Review_Disapproved_Exchange	If MSS, sent to pSite PI, primary contact, IP points of contact If site on pSite side§, sent to sIRB IP points of contact If site on sIRB side§, sent to pSite IP points of contact
Transition Post-Review > Inactive	<ID> has been disapproved - sIRB side*	IRB_T_Post-Review_Disapproved	sIRB PI, PI proxies, primary contact
	<ID> has been disapproved - pSite side*		pSite PI, PI proxies, primary contact
Transition Post-Review > Human Research, Not Engaged	<ID> is human research, not engaged	IRB_T_Post-Review_HumanResearchNotEngaged	PI, PI proxies, primary contact
	<ID> is human research, not engaged - exchange*	IRB_T_Post-Review_HumanResearchNotEngaged_Exchange	pSite PI, primary contact, IP points of contact
Transition Post-Review > Inactive	<ID> has been disapproved - exchange*	IRB_T_Post-Review_Inactive_Exchange	If pSite, sent to sIRB IP points of contact If sIRB, sent to pSite IP points of contact
Transition Post-Review > Not Human Research	<ID> is not human research	IRB_T_Post-Review_NotHumanResearch	PI, PI proxies, primary contact
	<ID> is not human research - exchange*	IRB_T_Post-Review_NotHumanResearch_Exchange	pSite PI, primary contact and IP points of contact
Transition Pre-Review > Approved	<ID> has been approved - study, pSite*	IRB_T_Pre-Review_Approved	PI, PI proxies, primary contact
Transition Pre-Review > Pending sIRB Review	<ID> site updates accepted	IRB_T_PreReview_PendingSirbReview_AcceptSiteUpdates_Exchange (for site modifications)	sIRB IP points of contact
	<ID> reliance confirmed	IRB_T_PreReview_PendingSirbReview_ConfirmReliance_Exchange (for external site submissions)	sIRB IP points of contact
	<ID> routed for sIRB Review	IRB_T_PreReview_PendingSirbReview_RouteForSirbReview_Exchange (for RNI submissions)	sIRB IP points of contact
Transitions‡ Pre-Review > Acknowledged Non-Committee Review > Acknowledged Committee Review > Acknowledged	<ID> review is complete	IRB_T_Review_Acknowledged	Submitter of RNI, responsible party, plus related studies' PIs, PI proxies, and primary contacts
Transition Pending sIRB Review > Action Required	<ID> requires action to resolve	IRB_T_RNI_ActionRequired	RNI responsible party
	<ID> assigned to responsible party for required action	IRB_T_RNI_ActionRequired byResponsibleParty	Submitter of RNI, plus related studies' PIs, PI proxies, and primary contacts
Transition Post-Review > Action Required	<ID> requires action to resolve	IRB_T_RNI_ActionRequired	RNI responsible party
	<ID> assigned to responsible party for required action	IRB_T_RNI_ActionRequired byResponsibleParty	Submitter of RNI, plus related studies' PIs, PI proxies, and primary contacts
Transitions Clarification Requested (Pre-Review) > Pre-Review Clarification Requested (Committee Review) > Committee Review	<ID> updated with clarifications	IRB_T_RNI_Changes Requested_Submit Changes (for RNI submissions)	IRBC
Transition Clarification Requested (Designated Review) > Non-Committee Review			Designated reviewer
Transitions‡ Post-Review > Acknowledged Post-Review > Complete	<ID> review is complete	IRB_T_RNI_Post-Review_Complete	Submitter of RNI, responsible party, plus related studies' PIs, PI proxies, and primary contacts
Transitions‡ Pre-Review > pSite Review	(ID) routed to pSite for review - exchange*	IRB_T_RNI_PreReview_pSiteReview_Exchange	Reporting pSite IP points of contact

Transitions	<ID> clarification was requested	IRB_T_Several States_ClarificationRequested (for non-RNI submissions)	PI, PI proxies, primary contact
Pre-Review > Clarification Requested (Pre-Review) Non-Committee Review >Clarification Requested (Designated Review)		IRB_T_RNI_Several States_ClarificationRequested (for RNI submissions)	Submitter of RNI, plus related studies' PIs, PI proxies, and primary contacts
Transition All > Pre-Submission	<ID> has been withdrawn	IRB_T_Withdrawn (for non-RNI submissions)	PI, PI proxies, primary contact, IRBC
		IRB_T_RNI_Withdrawn (for RNI submissions)	Submitter of RNI, plus related studies' PIs, PI proxies, and primary contacts
Transitions‡ Pre-Submission > Pending sIRB Review	<ID> submitted	IRB_T_RNIPreSubmission_to_AwaitingsIRBReview_Exchange	sIRB related study PI and IP points of contact
Transitions Inactive > Active Pending sIRB Review > Active Pending sIRB Review > External IRB	<ID> has been activated - pSite side*	IRB_T_SeveralStates_Active	PI, PI proxies and primary contact
Transitions Inactive > Active	<ID> has been activated - exchange*	IRB_T_SeveralStates_Active_Exchange (for site submissions)	If pSite side§, sent to sIRB IP points of contact If sIRB side§, sent to pSite IP points of contact
Transitions Pending sIRB Review > Active			sIRB IP points of contact
Transitions Suspended > Closed Active > Closed Inactive > Closed	<ID> has been closed - sIRB side*	IRB_T_SeveralStates_Closed	sIRB PI, PI proxies, primary contact
Transitions Active> Closed Inactive > Closed	<ID> has been closed - pSite side*		pSite PI, PI proxies, primary contact
Transitions Suspended > Closed Active > Closed Inactive > Closed	<ID> has been closed - exchange*	IRB_T_SeveralStates_Closed_Exchange	If site on pSite side§, sent to sIRB IP points of contact If sIRB side, sent to pSite IP points of contact
Transitions Pending sIRB Review > Deferred	<ID> has deferred - pSite*	IRB_T_SeveralStates_Deferred	pSite PI, PI proxies, primary contact
Transitions Post-Review > Deferred	<ID> has been deferred - study, pSite*		If study, sent to sIRB PI, PI proxies and primary contact If site or site mod on pSite side§, sent to pSite PI, PI proxies, primary contact
	<ID> has been deferred - sIRB side*		sIRB PI, PI proxies, primary contact
Transitions Pending sIRB Review > Deferred	<ID> has been deferred - exchange*	IRB_T_SeveralStates_Deferred_Exchange	sIRB IP points of contact
Transitions Post-Review > Deferred			If MSS, sent to pSite PI, primary contact, IP points of contact If site on pSite side§, sent to sIRB IP points of contact If site on sIRB side§, sent to pSite IP points of contact
Transitions All transitions > Discarded	<ID> has been discarded	IRB_T_SeveralStates_Discarded	IRBC
Transitions Pending sIRB Review > Inactive	<ID> has been disapproved - pSite side*	IRB_T_SeveralStates_Inactive	pSite PI, PI proxies, primary contact
Transitions Suspended > Inactive	<ID> has been deactivated - sIRB side*		sIRB PI, PI proxies, primary contact
Transitions Pre-Review > Inactive	<ID> reliance declined - pSite side*		pSite PI, PI proxies, primary contact
Transitions Pending sIRB Review > Inactive	<ID> has been disapproved - exchange*	IRB_T_SeveralStates_Inactive_Exchange (for site submissions)	sIRB IP points of contact
Transitions Suspended > Inactive	<ID> has been deactivated - exchange*		If pSite side§, sent to sIRB IP points of contact If sIRB side§, sent to pSite IP points of contact
Transitions Pre-Review > Inactive	<ID> reliance declined - exchange*		
Transitions Approved > Lapsed Suspended > Lapsed Human Research, Not Engaged > Lapsed Not Human Research > Lapsed	<ID> has lapsed	IRB_T_SeveralStates_Lapsed	PI, PI proxies, primary contact
Transition Post Review > Modifications Required	<ID> modifications are required - study, pSite*	IRB_T_SeveralStates_ModificationsRequired	Local PI, PI proxies, primary contact
	<ID> modifications are required - sIRB side*		sIRB PI, PI proxies, primary contact
Transition Pending sIRB Review > Modifications Required	<ID> modifications are required - pSite*		Study's PI, PI proxies, primary contact
Transition Modifications Submitted > Modifications Required	<ID> modifications are required		PI, PI proxies, primary contact

Transition Post Review > Modifications Required	<ID> modifications are required - exchange*	IRB_T_SeveralStates_ModificationsRequired_Exchange (for multi-site study and site submissions)	If MSS, sent to pSite PI, primary contact and IP points of contact If site on pSite side§, sent to sIRB IP points of contact If site on sIRB side§, sent to pSite IP points of contact
Transition Pending sIRB Review > Modifications Required			sIRB IP points of contact
Transitions Approved > Suspended Lapsed > Suspended	<ID> has been suspended	IRB_T_SeveralStates_Suspended	PI, PI proxies, primary contact
Transitions Active > Suspended Inactive > Suspended	<ID> has been suspended - sIRB side*		sIRB PI, PI proxies, primary contact
Transitions Active > Suspended Inactive > Suspended	<ID> has been suspended - exchange*	IRB_T_SeveralStates_Suspended_Exchange (for site submissions)	pSite IP points of contact
Approved > Terminated Lapsed> Terminated Suspended > Terminated	<ID> has been terminated	IRB_T_SeveralStates_Terminated (for non-site submissions)	PI, PI proxies, primary contact
Transitions Suspended > Terminated Active > Terminated Inactive > Terminated	<ID> has been terminated - sIRB side*	IRB_T_SeveralStates_Terminated (for site submissions)	sIRB PI, PI proxies, primary contact
Transitions Suspended > Terminated Active > Terminated Inactive > Terminated	<ID> has been terminated - exchange*	IRB_T_SeveralStates_Terminated_Exchange	pSite IP points of contact