I have an existing study in ePIRATE. Can I copy it for use as a template for new study submissions in the future?

- Principal Investigators (PI) are allowed, in ePIRATE, to copy an existing study for use as a template for future new study submissions. Only the PI can copy his or her existing study. Other study team members are not permitted to copy a study.

- In the ePIRATE workspace for his or her study the PI will find a button titled “Copy Study”. This button is located on the left side of the screen under the heading “My Activities”.

- Clicking this button will copy the study for immediate use as a template for a new study submission. The PI also has the option to copy a study, store the new template under his/her “My Templates” tab on their ePIRATE Home page and return to use the template as many times as they wish.

- PLEASE REMEMBER – You are copying an existing study. The responses and uploaded documents in the copied study/template relate to the existing study. When you are ready to create a new study submission using your copied study/template you must be sure to revise all responses and uploaded documents ensuring that the new study application accurately reflects the content of the new study.

- A new study submission, created from a template, where the responses and uploaded documents have not been properly revised to reflect the new study will be returned to the PI for modifications. This may result in the delay of approval of your new study.

- The following slides will provide you with instructions on how to copy a study in ePIRATE.
So you wish to copy an existing study for use as a template for future new study submissions. You may do this by using the "Copy Study" function. This tutorial will take you through the steps to copy a study.

Once you are logged in to your ePIRATE Home page select the study you wish to copy by clicking on the title of the study. This will take you to the study workspace.

For the purposes of this tutorial the study titled "How to Upload Documents in ePIRATE II" will be selected for copying.
Study: How to Upload Documents in ePIRATE II (UMCIRB 15-001143)

- **Principal Investigator:** UMCIRB UMCIRB
- **Study Type:** There are no items to display

This is the ePIRATE workspace for the study you wish to copy.

Click "Copy Study"

**Note:** Only the Principal Investigator (PI) of the study may copy his or her study.
This is the pop-up box that appears when you click "Copy Study".

Give your new study/template a name.
You have named your new study/template.

You now have two choices:
1. Do you wish to proceed with this as a new study submission immediately, or
2. Do you wish to make this a template, to which you can return, to be used for all future study submissions.

If you wish to copy this study for immediate use for a new study submission select "No" to the question "Copy study to My Templates". Selecting "No" will place the copied study in your "Inbox" on your ePIRATE Home page. (Note that "No" is the default selection).

Selecting "Yes" will place the copied study under your "My Templates" tab on your ePIRATE Home page for use later.

Click "OK" after you have named the new study/template and selected "Yes" or "No" to the question "Copy study to My Templates".
See below, your study titled "How to Upload Documents to ePIRATE II" has been copied and renamed and appears under the "Inbox" tab in your ePIRATE Home page.

See also, it is in a state of "Pre Submission" and you may now click on the new study title to enter the workspace to begin preparing it for submission.

DO NOT FORGET! Your new study is a COPY of another study, it contains all of the responses and uploaded documents related to the study you copied; you MUST revise the new study smart form to accurately reflect the content of the new study. This includes uploading new documents throughout, if necessary, to reflect the new study.
So, let’s say you have a study which is approved. You plan to conduct very similar studies in the future and you would like to copy this study and use it as a template for future new study submissions but you are not yet ready to begin preparing a new study using the template.

The “Copy Study” function allows you to create a “Template” using this existing study. You may then use this template repeatedly for copying. Your study template will be “stored” on your ePIRATE Home page under the tab titled “My Templates”. To do this take the following steps:

1. Select the study you wish to copy from your study list on your ePIRATE Home page, this will take you to the existing study workspace. (In this screen shot we have already selected the study we wish to copy and are in the study workspace.)
2. Click “Copy Study”
3. In the pop-up box, name the study template.
4. Select “Yes” in response to the question “Copy study to My Templates.”
5. Click “OK” below.
When you return to your ePIRATE Home page and click on the tab titled "Templates" you will see your template listed and available for use.

Click on the title of the template to go to the template workspace and use it to create a new study.
This is your template workspace.

Click on "Copy Study" and proceed with steps described in slide #5 to copy the template and create a new study.