



## VIRTUAL IRB MEETINGS

### Introduction

Management of virtual board meetings presents unique challenges and benefits in the IRB review environment. The key to a successful virtual meeting is navigating the missing visual and interpersonal cues that occur during in-person meetings. In the virtual space, it is critical that rules of order be followed and that a collegial culture of respect is fostered that allows for differences of opinion and healthy discourse to be expressed in an orderly manner. Consistency in virtual meeting practice will affirm the ongoing practices of the IRB and allow for reviews presented in the virtual environment to become more fluid over time.

### Regulatory Requirements

The regulatory requirements (e.g. quorum, representation, etc.) for a virtual IRB meeting are the same as a live meeting. Use of an electronic submission and review process supports the virtual review process and ensures compliance with IRB policies.

### Roles and Responsibilities of Attendees

Each virtual IRB meeting will be run consistent with the IRB [Standard Operating Procedures \(SOPs\)](#), IRB training materials and guidance. The standard roles and responsibilities of members and other meeting attendees also apply to virtual meetings.

**Technology check.** The University of Utah IRB will utilize **WebEx** for virtual IRB meetings.

- Please use an Ethernet connection (hard line) rather than Wi-Fi whenever possible.
- All attendees should use a video-capable connection, such as a desktop, laptop computer, tablet, or smartphone to participate in the meeting. Use your computer to view the shared screen, where the IRB will display the agenda, rules of order, and voting instructions.
- It is required that members call in with their phones for audio, rather than their machine's built-in microphone. If you use a cell phone to call in, please use a headset with a microphone. The IRB will supply you with a headset if you need one.
- Test your technology several days before your scheduled board meeting to ensure you are able to connect to the virtual meeting on time and be fully operational when the meeting is called to order.
- Please mute yourself when you aren't speaking. Make sure you are familiar enough with the WebEx interface to know how to complete basic operations in the program.

**Ensure the IRB Coordinator is aware of your conflicts ahead of time.** If you have a Conflict of Interest (CoI) with any item on the discussed agenda (not just the items assigned to you for review), you must alert the IRB Coordinator before the meeting begins. It is critical that this information is communicated to the IRB Coordinator early to ensure arrangements can be made in advance and that there are sufficient members connected to the meeting to maintain quorum.

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**Pay attention.** Members are expected to conduct themselves the same way they would for an in-person meeting. Do not disengage when you are not presenting. Refrain from multitasking (e.g., checking email, working on non-IRB items, talking with people in the room with you, etc.) during the virtual meeting. If you are connected to the call, it is assumed that you are “in the room” and available for questions, discussion, etc. Because attendees of virtual meetings cannot be physically present, it is more important than ever that all attendees be mentally present for the meeting.

**Audibly announce when you leave the room and return.** The IRB is required to note in the minutes whenever a voting member of the board enters or leaves the room. This assists us in keeping track of the votes, quorum, and other essential elements of running an IRB meeting. The same is true for virtual meetings. If you need to physically leave the room and be away from your computer, alert the meeting Coordinator that you will be temporarily “away from your keyboard.” Notify the Coordinator when you return.

**The virtual meetings have a Meeting Host.** The Meeting Host is a member of the IRB staff other than the IRB Coordinator and Administrator who attend to take minutes and manage quorum. The Host helps ensure the meeting runs smoothly from an operational standpoint by managing the virtual interface. The Meeting Host’s responsibilities include:

- Displaying the agenda and relevant information on the shared screen.
- Alerting the Chair when a hand is raised for a question or comment.
- Opening voting polls and announcing when the poll is closed.
- Muting and unmuting attendees as needed.

### Rules of Order: Opening the Meeting

1.	The <b>Chair</b> calls the meeting to order and reminds the attendees of the Conflict of Interest (Col) policy. <ul style="list-style-type: none"><li>• “Members with a conflict with any item on the agenda should declare their conflict during roll call. We will move the item to the end of the agenda and excuse you from the virtual meeting before the item is discussed.”</li></ul>
2.	The <b>Meeting Host</b> displays a list of the known board member Col's for the current meeting, as well as the attendance list for the meeting.  (Agenda items that must be moved to the end of the agenda will be communicated to the <b>Chair and Meeting Host</b> before the meeting by the <b>IRB Coordinator</b> .)
3.	The <b>Chair</b> turns the meeting over to the <b>Meeting Host</b> for roll call.
4.	The <b>Meeting Host</b> conducts a roll call of all voting members.

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5.	<p>When a <b>Board Member's</b> name is called, they should audibly confirm their presence and that they can hear and speak.</p> <p><b>Members</b> who are calling from a phone-only connection should self-identify, as they will be unable to participate in on-screen voting and will have their votes taken audibly for each item.</p>
6.	<p>At the conclusion of roll call, the <b>Meeting Host</b> audibly turns the meeting over to the <b>Chair</b>.</p>
7.	<p>The <b>Chair</b> requests a motion to approve the minutes from the last meeting. Any voting Board Member may verbally move to approve the minutes. The <b>Chair</b> repeats the motion and opens the item for virtual vote, which signals the Meeting Host to open the vote poll.</p>
8.	<p>The <b>Meeting Host</b> opens the vote poll and announces to all attendees that the voting poll is open. Members cast their votes via the on-screen poll, while the Meeting Host unmutes phone-only members, and calls each member's name to request an audible vote one at a time.</p> <p>After all audible votes are cast and recorded, the on-screen poll is closed and recorded.</p> <p>Members who fail to log their vote either audibly or via the poll will be counted as abstaining.</p> <ul style="list-style-type: none"><li>Members who abstain from 3 or more consecutive votes during the meeting will be called out during the meeting to ensure they are still present and connected to the meeting.</li></ul> <p>When the voting has concluded, the <b>Meeting Host</b> audibly turns the meeting over to the <b>Chair</b> for the first review.</p>

### Rules of Order: Application Reviews, Discussion, and Voting Procedure

9.	<p>The <b>Meeting Host</b> displays the agenda on the shared screen. If there are any Business or Information Items, they will be displayed at this time.</p>
10.	<p>The <b>Chair</b> introduces the first item for board review and turns the meeting over to the <b>Primary Reviewer</b> for their presentation.</p>
11.	<p>The <b>Primary Reviewer</b> presents their review of the item, presents any questions they wish to have the board address, and then concludes with a motion.</p>
12.	<p>The <b>Chair</b> audibly turns the meeting over to the <b>Secondary Reviewer</b> for their presentation (if applicable).</p>
13.	<p>The <b>Secondary Reviewer</b> presents their review of the item, presents any questions they wish to have the board address, and then concludes with a motion.</p>
14.	<p>The <b>Chair</b> asks the membership if they have any questions or comments in response to the reviews presented.</p>

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15.	<p><b>Board Members</b> with questions or comments should raise their hand in the WebEx interface, ask their question in the chat box, or audibly say “I have a question” at this time. The <b>Meeting Host</b> helps the <b>Chair</b> identify individuals who would like to speak. <b>Members</b> should wait for the <b>Chair or Meeting Host</b> to turn the meeting to them before speaking to ensure attendees do not talk at the same time.</p>
16.	<p>The <b>Chair and Meeting Host</b> will manage questions and comments in an orderly fashion, ensuring each member’s question or comment is addressed.</p> <p>The <b>Meeting Host</b> will unmute members who raise their hands or ask questions aloud and audibly turn the meeting to them.</p>
17.	<p>After the presentation and discussion of an item has concluded, the <b>Chair</b> will repeat the motion on the floor for the item to ensure all membership has heard it.</p> <ul style="list-style-type: none"><li>• E.g., “<i>The motion is to approve this item as submitted.</i>”</li></ul> <p>The Chair audibly turns the meeting over to the <b>Meeting Host</b>.</p>
18.	<p>The <b>Meeting Host</b> opens the vote poll and announces to all attendees that the voting poll is open.</p> <p>Members cast their votes via the on-screen poll, while the Meeting Host unmutes phone-only members, and calls each member’s name to request an audible vote one at a time.</p> <p>After all audible votes are cast and recorded, the on-screen poll is closed and recorded.</p> <p>Members who fail to log their vote either audibly or via the poll will be counted as abstaining.</p> <ul style="list-style-type: none"><li>• Members who abstain from 3 or more consecutive votes during the meeting will be called out during the meeting to ensure they are still present and connected to the meeting.</li></ul> <p>When the voting has concluded, the Meeting Host audibly turns the meeting over to the <b>Chair</b>.</p>
19.	<p>The <b>Chair</b> introduces the next item and audibly turns the meeting over to the <b>Primary Reviewer</b> for the next presentation.</p>

### Rules of Order: Items with Attendee Conflicts of Interest

20.	<p>The <b>Chair</b> announces that the next item discussed will be an agenda item where a voting member has a conflict of interest (Col).</p> <p>The <b>Chair</b> audibly excuses the conflicted <b>Member</b> with a Col from the meeting, signaling the <b>Meeting Host</b> to use the “Excuse to Lobby” WebEx function to temporarily excuse the <b>Member</b> from the virtual meeting.</p>
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21.	The <b>Meeting Host</b> audibly confirms the member has been excused to the WebEx Lobby, stating the <b>Member's</b> name for the minutes. <ul style="list-style-type: none"><li>• "I can confirm that Dr. John Doe has been excused to the Lobby."</li></ul>
22.	The conflicted <b>Member</b> waits in the Lobby until they are invited to rejoin the meeting by the <b>Meeting Host</b> .
23.	The <b>Chair</b> introduces the next item and turns the meeting over to the <b>Primary Reviewer</b> for the next presentation.  After the discussion and vote, the <b>Chair</b> audibly asks the <b>Meeting Host</b> to invite the excused <b>Member</b> back into the virtual space.
24.	The <b>Meeting Host</b> invites the <b>Member</b> back to the meeting. When it appears the <b>Member</b> has rejoined, the <b>Meeting Host</b> asks them to audibly confirm that they have successfully rejoined and can hear and see the meeting.
25.	The <b>Member</b> states that they are back and can hear and see.
26.	The <b>Chair</b> introduces the next item and turns the meeting over to the <b>Primary Reviewer</b> for the next presentation.

### Rules of Order: Closing the Meeting

27.	The <b>Chair</b> announces that the last item has been discussed and asks if there are any outstanding items, questions, comments, or Expedited items that need additional discussion.
28.	<b>Members</b> who have items to discuss should raise their hand, type their question/comment in the Chat box, or for phone-only participants, audibly indicate they have something to say.
29.	The <b>Meeting Host</b> will take note of all members who have questions or comments, and will either: <ol style="list-style-type: none"><li>1. Go through each member's question/comment one at a time, naming the member who commented and allowing them time to speak, or</li><li>2. Audibly confirm to the Chair that there are no pending matters to discuss.</li></ol>
30.	The <b>Chair</b> will audibly confirm that all pending matters have been satisfactorily resolved and declares that the IRB board meeting is over, signaling to the <b>Meeting Host</b> to disconnect the online session.
31.	The <b>Meeting Host</b> will audibly confirm that attendees may disconnect from the meeting. <ul style="list-style-type: none"><li>• "This IRB meeting is now concluded. Attendees, you may now disconnect from the virtual space."</li></ul>

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## WebEx User Guides & Resources

- [Complete WebEx User Guide](#)
- [Join a WebEx Meeting from an Email Invitation](#)
- [Choose Your Audio and Video Settings Before You Join a WebEx Meeting](#)
  - **Connect your audio via phone:** Select the “**Call in**” option — Dial in from your phone when the meeting starts. A list of global call-in numbers is available after you join the meeting.
- [Mute or Unmute in WebEx](#)
- [Using Chat and Raising Your Hand in WebEx](#)

## References

- Webinar: Running a Virtual IRB Meeting. Hosted by CITI Program, presented by Angela L. Brunch, PhD, Capella University, 2/6/2020.
- University of Utah Standard Operating Procedures. <https://irb.utah.edu/guidelines/irb-sops.php>.

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